EDUCATION ENVIRONMENT SCAN 2026

Navigating a world of accelerating change.

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Future Makers

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Cover Image by Derek Wenmoth

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Executive Summary

Four Years of Accelerating Change

This document is the 2026 edition of the Education Environment Scan, first published by FutureMakers in 2022. It is not a minor update. The four years between editions have seen more consequential change - geopolitical, technological, social, and pedagogical - than any comparable period in recent memory. The world our learners are entering is not the world we prepared for when current education systems were designed. The purpose, structure and delivery of education must evolve: not incrementally, but transformationally.

The intervening years have brought the emergence of generative AI as a mainstream tool - arguably the most significant technological shift since the internet - alongside a pronounced philosophical shift toward direct instruction and structured approaches to literacy and mathematics. Cyclone Gabrielle reshaped how we think about school resilience. A new coalition government has reset significant elements of the educational landscape. And the persistent challenges of teacher supply, achievement equity, and child poverty have deepened, not resolved. Each of these would represent a substantial challenge in isolation. Taken together, they define the terrain of this scan.

From Two Burning Platforms to Four

The 2022 scan identified two 'burning platforms' - conditions so urgent and consequential that education cannot afford to respond slowly. They were **extreme climate and pandemic events**, and **escalating cyber threats**. Both remain fully relevant. But this edition adds two further burning platforms to that list, reflecting changes that have emerged or intensified since 2022.

The first is the **AI disruption** to learning, assessment, and professional practice - a shift so rapid and so fundamental that it challenges the validity of existing assessment models and demands an urgent, principled response from every level of the system. The second is the **teacher workforce crisis**. A profession in crisis cannot sustain a system in transformation. Teacher shortages and a workforce navigating rapid change without adequate professional learning support raise urgent questions about quality and consistency across the system. This is not merely a resourcing issue - it is an existential threat to the education our young people deserve.

These four burning platforms - climate change, cyber threats, AI disruption, and teacher workforce - are not parallel problems to be addressed in sequence. They interact, amplify one another, and converge. That convergence is the central analytical insight of this edition.

The Convergence Imperative: No Trend is an Island

Perhaps the most important contribution of this scan is its argument about how to read it - and how to think about the future more generally. This edition introduces what is referred to as the Convergence Imperative: the recognition that the forces shaping education in 2026 do not arrive one at a time, neatly packaged by domain. They collide, interact, and amplify one another in ways that make single-domain responses not merely insufficient, but potentially harmful.

This insight is not merely theoretical. At the start of 2026, the Future Today Strategy Group (one of the world's most respected strategic foresight organisations) deliberately discontinued their landmark annual Tech Trends Report after nearly two decades, replacing it with a Convergence Outlook. Their reasoning: "*The future no longer arrives one trend at a time.*" This is certainly true for education.

AI is not only a technology story - it is simultaneously an equity issue, a workforce challenge, an assessment crisis, and a legal frontier. Climate disruption is not only an environmental concern - it is an infrastructure investment question, a digital equity issue, and a driver of hybrid learning adoption. The cost-of-living crisis is not only an economic matter - it shapes attendance, engagement, and the very possibility of participation in education. No single trend, addressed in isolation, can be meaningfully resolved.

This document is therefore designed not as a catalogue of separate challenges, but as a shared map - a tool for building the cross-domain awareness that effective leadership in 2026 requires. Its aim is to create a common platform of understanding from which leaders, at every level of the system, can develop coherent, coordinated responses to a genuinely convergent future.

The Most Urgent Argument in This Report: Long-Term Commitment to Education

This scan closes with what is, in the view of its author, its most important argument - and the one most deserving of wide readership and serious debate.

Almost every significant challenge identified in these pages - the teacher workforce crisis, persistent achievement gaps for Māori and Pasifika learners, hybrid learning infrastructure, AI in education, climate resilience of school buildings, digital equity - shares one defining characteristic: none of it can be meaningfully addressed within a single three-year parliamentary term. These are generational challenges. They require sustained investment, consistent direction, and institutional patience over periods of ten, fifteen, or twenty years. They require the kind of commitment that outlasts governments.

And yet the dominant rhythm of educational policy in New Zealand has been the electoral cycle. Each incoming government arrives with genuine intent to improve the system; each outgoing government leaves behind a landscape of partially implemented reforms and a workforce that has learned - through hard experience - to wait out policy change rather than invest deeply in it. The cumulative effect is not stagnation, but something almost worse: perpetual motion without sustained progress.

What is needed - and what this scan explicitly calls for - is a **cross-party commitment to an agreed long-term strategic trajectory for education in Aotearoa New Zealand**: a set of enduring goals, grounded in evidence and shaped by genuine community engagement, that successive governments commit to sustaining regardless of which party holds power.

Crucially, this is not a vague call for consensus. A durable cross-party commitment would require structural mechanisms to give it teeth: protected principles that sit above the policy preferences of any single government; agreed progress measures and independent monitoring that survive changes in administration; staged implementation with genuine review points; and authentic partnership with iwi, the profession, communities, and the wider education sector. The architecture for this kind of commitment exists in other policy domains (e.g. New Zealand's Superannuation Fund operates on exactly this principle.) There is no reason education cannot develop its own.

The challenges facing New Zealand education in 2026 are not confined to just one political party. They are challenges belonging to this generation - and they demand a generational response. The communities of Aotearoa New Zealand, and especially those whose children have been most consistently underserved by our education system, deserve a system that makes and keeps promises across time. Achieving that requires political courage from all parties: the courage to agree, in public and on the record, that the education of the next generation matters more than political point-scoring.

The measure of a society's commitment to its future is not the policies it announces, but the investments it sustains. This document is offered in that spirit - as a contribution to the shared awareness, honest reckoning, and cross-sector collaboration that genuine educational transformation will require.

1. Summary Overview

This document draws on national and international literature to provide an education environment scan for 2026, assisting education leaders in Aotearoa New Zealand determine the future direction of their organisations and the wider system. Building on the 2022 Edition, it reflects the profound shifts that have occurred over the intervening years. Key messages include:

GLOBAL DISRUPTIONS	
Accelerating disruption	Our world remains in a state of accelerating, multi-dimensional disruption - spanning geopolitical instability, economic volatility, climate crisis, and technological transformation at a pace that now exceeds previous projections.
Generative AI as a paradigm shift	The emergence and rapid proliferation of generative AI since late 2022 has fundamentally altered the educational landscape, requiring urgent rethinking of purpose, pedagogy, assessment, and professional practice.
Climate impacts on schooling	Environmental disruptions - extreme weather events, flooding, and natural hazards/earthquakes - are increasingly causing school closures and damaging infrastructure, requiring new levels of preparedness across the sector.
NATIONAL CONTEXT	
NZ political reset	A significant shift in political direction since the 2023 election has led to substantial changes in curriculum design, teaching methodology, assessment, and the legislative framework for education.
Science of learning	The "sciences of learnings" have emerged as a dominant evidence-based framework informing curriculum and pedagogy in NZ and internationally, with government mandating structured literacy and mathematics approaches.
SYSTEM PRESSURES	
Hybrid learning models	Hybrid and flexible learning models have moved from 'emergency response' status to a genuine strategic necessity, driven by escalating climate events, rising cost-of-living pressures , and the ongoing need for educational continuity.
Equity imperative	Equity remains a deep and persistent challenge - including the digital divide, Māori and Pasifika achievement gaps, and the growing impact of child poverty and absenteeism on educational engagement.
Teacher workforce crisis	The teacher workforce crisis has deepened, with significant shortages in secondary specialist subjects, declining enrolments in teacher education, and concerns about workload, pay, and professional autonomy.
CHANGING LANDSCAPES	
Demographic shifts	New Zealand is experiencing significant population change and diversity. In addition, international education sector is experiencing renewed growth post-COVID, but faces complex questions about quality, equity, and national identity.
Changing expectations	Beneath every trend in this scan lies a deeper question of purpose - whether education exists primarily to serve economic ends, or to enable every young person to flourish as a human being. Resolving this shapes everything else.
Convergence, not isolation	Critically, none of the trends in this scan operates in isolation. This scan emphasises that the most significant educational challenges of our era emerge from the collision and amplification of multiple forces simultaneously - not from any single driver alone.

The world our learners are entering is not the world we prepared for when these systems were designed. The purpose, structure and delivery of education must evolve - not incrementally, but transformationally.

2. Introduction

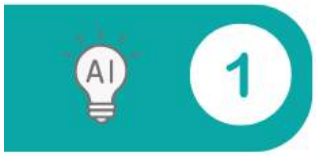
In 2022, the Education Environment Scan noted that we live in an era of accelerating change affecting every sphere of human existence. Four years on, that assessment remains not only valid but significantly amplified. The pace of change has intensified to a degree that even our most sophisticated forecasting frameworks struggle to keep up.

The concept of a VUCA world - Volatile, Uncertain, Complex, Ambiguous - has not diminished. If anything, the events of 2022–2026 have validated and deepened its application. Russia's invasion of Ukraine in 2022, the Hamas-Israel conflict from 2023 onwards, the ongoing US-China tensions, the current war in Iran and tensions in the Middle East, together with the extraordinary emergence of generative AI tools accessible to the general public have each, in their own way, reconfigured the terrain on which education is practised.

For New Zealand, these global forces interact with a domestic political transformation. The coalition government elected in October 2023 moved swiftly to reverse key elements of the previous Labour government's educational programme, including the curriculum refresh, decision to replace NCEA, and key structural elements of the system. This has created significant turbulence within the sector - though also, for some, welcome clarity and direction.

2.1 New and Intensified Burning Platforms

The 2022 Scan identified two principal 'burning platforms' for education: extreme events (including pandemic and climate events) and cyber-attacks. Both remain highly relevant in 2026, but are now joined by two additional burning platforms that present as being similarly urgent in terms of the consequences we'll face if they aren't addressed:



AI Disruption

The release of ChatGPT in late 2022 marked the beginning of a period of extraordinary disruption to almost every assumption about how knowledge is created, verified, and transmitted. Schools and tertiary institutions were caught largely unprepared, with policies struggling to keep pace. This is not merely a 'technology issue' - it is a fundamental challenge to the purpose and practice of education.

Teacher Workforce

A profession in crisis cannot sustain a system in transformation. Teacher shortages and a workforce navigating rapid change without adequate professional learning support raise urgent questions about quality and consistency across the system. This is not merely a resourcing issue - it is an existential threat to the education our young people deserve.

Climate Change

The frequency and severity of weather-related school closures has increased markedly. Cyclone Gabrielle (February 2023), which devastated large parts of the North Island, is the defining example for NZ, but extreme weather events affecting schooling are now a near-regular occurrence both here and globally.

Cyber Threats

The threat identified in 2022 has continued to escalate. Multiple school systems and educational data platforms have been compromised globally, and the sophistication of attacks - including AI-assisted phishing and ransomware - continues to grow.

2.2 Pain Points: 2026 Update

The pain points identified in 2022 have largely persisted, with several deepening significantly as illustrated below:

1 The foundations are cracking

Literacy and numeracy remain stubbornly below where they need to be, prompting the government's mandating of structured literacy and structured mathematics approaches - the most significant pedagogical intervention in NZ schooling for decades.

2 Reform without rootedness

Relentless policy change, without the professional learning infrastructure to support it, has left many teachers feeling under-prepared, undervalued, and overwhelmed. When reform is imposed faster than capability can be built, the cost is borne by the profession - and ultimately by learners.

3 Present in body, absent in mind

Student attendance and engagement is at historically poor levels, and post-COVID patterns of disengagement have proved difficult to shift. The underlying causes are complex. A student who is not there, or who is there but disengaged, is being failed by the system regardless of the quality of curriculum or teaching.

4 A system that still doesn't reach everyone

Māori and Pasifika learner outcomes remain persistently below those of their peers, and there are genuine concerns that some aspects of the current policy direction - including changes to curriculum and legislative frameworks - may exacerbate rather than address these gaps.

5 A generation under pressure

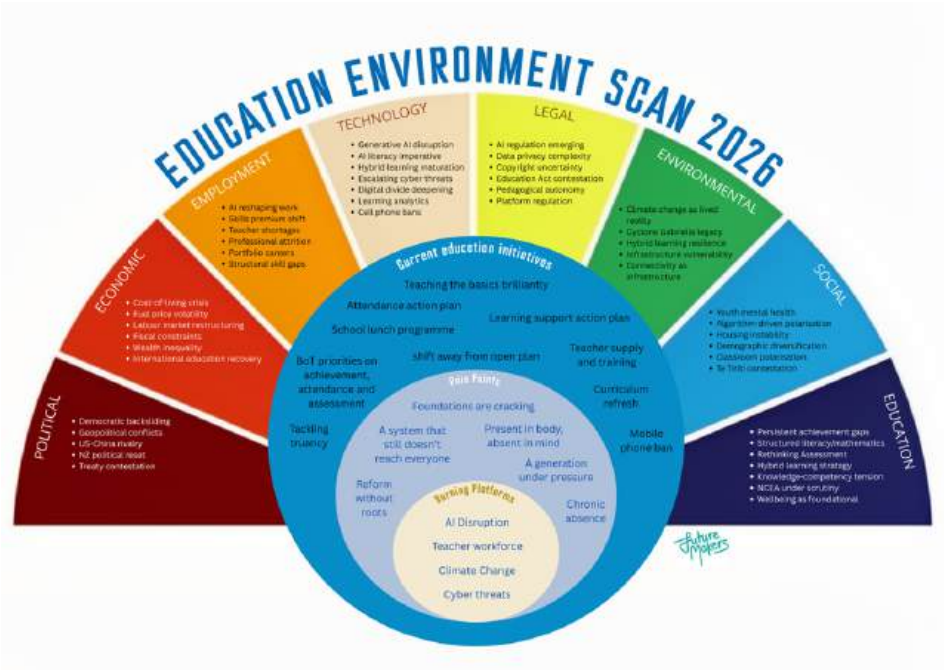
Student and staff wellbeing continues to be under significant pressure. Mental health presentations among young people and reports of teacher bun-out have increased markedly. A system that asks more of its people while providing less support is consuming the very human capital on which its recovery depends.

6 Chronic absence

Truancy rates remain at critical levels. While some improvements have been noted following government initiatives, the structural drivers - including poverty, housing instability, and disengagement - persist.

3. Navigating the framework ‘map’

To help with accessibility the key information provided in this scan has been presented in the form of a ‘map’ shown below (see appendix one on page 36 for a larger version).



PESTLE Themes

As with the 2022 environment scan, the outer rim contains a bullet point summary of the key themes in each of the eight dimensions of the (adapted) PESTLE[1] framework. These are explained in more detail in chapters 5 – 12 of this document.

Burning Platforms

The central part of the illustration focuses on the four ‘burning platforms’ identified in this scan. These are issues identified as being so critical, so time-sensitive, that it becomes the lens through which other choices must be made. Without that shared understanding, people can continue to debate, delay, or prioritise differently; with it, there’s a collective recognition that “we have to act, and we have to act now,” which brings focus and alignment to what happens next.

Pain Points

Alongside the more urgent “burning platforms,” there are a number of persistent pain points—the issues that may not demand immediate crisis response, but are felt day to day across the sector. These are the ongoing frustrations, inefficiencies, and gaps that quietly drain energy, limit progress, and, if left unaddressed, can compound over time into much larger challenges. Naming these pain points helps surface what people are experiencing on the ground and creates an opportunity to respond more deliberately, rather than simply working around them.

Current Education Initiatives

Finally there’s a list of current education initiatives, largely sourced from government priorities, that reflect where effort, policy attention, and funding are being directed. These initiatives represent the system’s targeted attempts to address immediate pressures while also improving underlying conditions. Understanding this landscape helps make sense of why certain actions are being prioritised, and where there may be alignment, gaps, or opportunities for more coherent and sustained impact.

[1] Ref https://www.cipd.org/en/knowledge/factsheets/pestle-analysis-factsheet/

4. Reading This Scan: The Convergence Imperative

This section contains a note on how to use this document - and why the way we have traditionally read environment scans may itself need to change.

4.1 The limits of trend-by-trend thinking

Environment scans - including this and the 2022 edition of this document - are traditionally structured around discrete domains: political, economic, social, technological, legal, environmental. Each domain is analysed in relative isolation, with cross-references made where obvious. This approach has genuine value: it provides structure, enables depth, and gives readers a clear map of the landscape.

But it carries a hidden risk. It can encourage us to read the future one trend at a time - as if AI is a technology story, climate is an environmental story, and political polarisation is a governance story - each with its own implications, each manageable within its own lane. That is not how the future actually arrives.

4.2 The Convergence Era

For nearly two decades, the Future Today Strategy Group (FTSG) - one of the world's most respected futures and strategic foresight organisations - published an annual Tech Trends Report that reached millions of readers and informed strategy in organisations worldwide. At the start of 2026, they made a deliberate, public decision to discontinue that report and replace it with something fundamentally different: the Convergence Outlook.

> *"The future no longer arrives one trend at a time. Technological progress, scientific breakthroughs, regulatory shifts, capital constraints, geopolitical pressure, and human behaviour are increasingly interacting with one another. Barriers between systems have disappeared, as the forces of disruption amplify, accelerate, or destabilize one another. Change now spreads sideways as fast as it moves forward. In this environment, understanding individual trends is necessary, but it is insufficient." - Future Today Strategy Group, Convergence Outlook 2026 (ftsg.com/convergence)*

FTSG's CEO Amy Webb described the shift as an act of deliberate self-disruption - recognising that even a once-great innovation, if held onto too long, becomes a liability. Their new Convergence Outlook is built around the insight that we have entered a Convergence Era, defined not by isolated trends but by the collision of technologies, capital flows, geopolitics, climate pressures, and behavioural shifts at scale. In this era, the most dangerous leadership posture is to remain a well-informed observer of your own disruption.

4.3 What convergence means for education

The implications for how we read - and act on - an environment scan are significant. The sections that follow examine each PESTLE domain in turn. But the deeper work of interpretation lies in understanding how these domains interact and amplify one another. A few illustrative examples:

Politics × Pedagogy. The current NZ government's mandate of structured literacy and mathematics is not simply a pedagogical choice - it is a political act, embedded in a particular view of the relationship between government, evidence, and professional autonomy. At the same time, the defunding of some equity-focused initiatives reflects economic priorities. The result for schools is a pedagogical environment that cannot be understood without understanding the political and economic convergence that shaped it.

AI × Cost of Living × Attendance. Rising fuel costs make travel to school more expensive. Generative AI makes high-quality educational content accessible from home. The convergence of these two trends - one economic, one technological - significantly strengthens the case for hybrid learning, not as a pedagogical preference, but as a structural response to converging pressures.

Climate × Infrastructure × Equity. Extreme weather events close schools. But not all closures are experienced equally - rural schools, low-decile schools, and schools in flood-prone areas face disproportionate disruption. When digital infrastructure is inadequate in these same communities, the climate event compounds the existing equity gap. The convergence of environmental, technological, and social factors produces an outcome far worse than any single factor would predict.

AI × Assessment × Teacher Workforce. Generative AI challenges the validity of traditional assessment. Redesigning assessment requires teacher expertise, time, and professional learning investment. But the teacher workforce is under severe strain, with little capacity to absorb new demands. These three forces - technological disruption, assessment reform, and workforce crisis - converge into a challenge that no single solution can address.

Geopolitics × International Education × Identity. Global conflict and political polarisation affect the perception of New Zealand as a study destination, the mix of nationalities in NZ classrooms, and the geopolitical sensitivities teachers must navigate when discussing world affairs. The international education revenue target ($4.4B by 2027) adds an economic layer. The result is a convergence of geopolitical, economic, and social forces that shapes something as seemingly local as a Year 12 social studies lesson.

4.4 How to use this scan

The PESTLE structure that follows is a tool for analysis, not a description of reality. Reality is messier, more interconnected, and more dynamic than any framework can capture. We encourage readers to use this document in the following ways:

- **Use the sections as entry points**. Read each section for its specific insights - but resist the temptation to treat sections as self-contained.
- **Look for intersections**. After reading each section, ask: which other domains does this intersect with most powerfully? Where are the amplifying effects?
- **Apply locally**. Consider the 'convergence implications' for your specific context. A rural school faces different convergences than an urban school; a secondary school faces different pressures than a primary. The convergence that matters most is the one most relevant to your community.
- **Map the interactions**. Use the summary table in Section 11 not just as a reference, but as a starting point for mapping convergences: which cells in the table interact with each other in your context?
- **Treat it as dynamic.** Return to this scan periodically - not as a static document but as a living framework. As new events unfold, the convergences will shift. The scan is a map; the territory changes.

The most important question this document can prompt is not 'What is happening in each of these areas?' but 'How are these things happening together - and what does that mean for the learners in my care or the community our school is a part of?'

The eight themes:

The following chapters address the eight theme areas of the (adapted) PESTLE framework as illustrated in the diagram on page 9. They may be read in any order as interest arises, and referenced during discussions relating to the issues identified in the central part of that diagram.

5. Global Political Landscape

The global political landscape has become significantly more turbulent since 2022. The international order that underpinned relatively stable globalisation is under strain from multiple directions, with direct consequences for education policy, international student mobility, and the values and competencies schools must cultivate.

5.1 **Democratic backsliding and populist nationalism.**

Concerns about the health of democracy have intensified in the 2022–2026 period. The rise of populist-nationalist movements across Europe and the Americas has produced governments that - in some cases - are actively challenging institutions, the media, and international cooperation frameworks. The political polarisation visible in the US, UK, France, and elsewhere creates a challenging environment for education systems that seek to develop globally oriented, critically literate citizens.

5.2 **Geopolitical conflict and its educational implications.**

The wars in Ukraine and the Middle East have not only caused immense human suffering - they have disrupted global supply chains, driven energy prices upwards, and created new migration pressures. These conflicts are not distant abstractions for New Zealand educators: rising fuel prices directly affect school transport costs and family decision-making about attendance; refugee and migrant students from affected regions are entering NZ classrooms; and teachers are navigating the challenge of addressing geopolitical events in ways that are age-appropriate, culturally safe, and intellectually honest.

5.3 **US-China tensions and the restructuring of alliances.**

The deepening strategic competition between the United States and China has significant implications for New Zealand, which has important trade relationships with China and security relationships with the US and Australia (through ANZUS and Five Eyes). For education, this manifests in questions about research partnerships, international student recruitment, and the geopolitical dimensions of curriculum - including how we discuss global histories, emerging technologies, and democratic values.

5.4 **Post-COVID global health preparedness.**

While acute COVID-related disruption has largely passed, the pandemic has fundamentally changed how schools think about continuity planning, hybrid delivery, and the relationship between physical attendance and effective learning. The global public health infrastructure has been strengthened in some respects, but significant vulnerabilities remain - and the likelihood of future pandemic-style disruptions remains elevated.

5.5 **Misinformation, disinformation and media literacy as political challenges.**

The weaponisation of social media for political purposes, the proliferation of AI-generated content, and the general decline of shared epistemic frameworks represent a profound challenge for education. Preparing young people to navigate an information environment characterised by disinformation, deep fakes, and algorithmic manipulation is now a core educational responsibility - not an optional extra.

5.6 **Significant political shift post-2023 election.**

The National-ACT-NZ First coalition government elected in October 2023 has pursued an ambitious programme of educational reform, reversing many of the Labour government's initiatives. Key changes include: the mandating of structured literacy and mathematics approaches; revision of the curriculum framework; decision to replace NCEA; the introduction of charter schools; and significant legislative changes affecting the role of Māori language and culture in education. These changes have been welcomed by some as a necessary reorientation toward educational basics and evidence-based practice, and critiqued by others as ideologically driven and potentially harmful to Māori learners and community trust.

5.7 **Treaty of Waitangi and the legislative framework.**

The government's Education and Training Amendment Act proposals have included provisions that critics argue effectively reduce the statutory obligations of schools in relation to tikanga Māori, mātauranga Māori, and Te Reo Māori. This is a significant point of contention within the sector, with strong objections from Māori communities, educators, and civil society. The implications for Māori-medium education and for the bicultural foundations of the New Zealand Curriculum are the subject of ongoing debate.

5.8 **Charter schools.**

The re-introduction of charter schools (Kura Hourua) represents a significant structural change to the NZ education system. Proponents argue they will provide innovative, responsive options for learners not well served by the mainstream system. Critics raise concerns about accountability, equity of funding, and the risk of fragmenting a broadly coherent system.

5.9 **NZ's stable democracy under scrutiny.**

New Zealand continues to rank highly on global democracy indices, but there are concerns - both domestically and internationally - about the pace and nature of some legislative changes, the treatment of minority rights, and the influence of coalition partner dynamics on policy. The health of democratic norms and institutions remains a matter of active civic interest.

6. Economic Landscape

The global economy has entered a period of sustained uncertainty, characterised by the aftermath of COVID-era stimulus, supply chain disruption, inflationary pressure, rising interest rates, and the escalating costs of climate adaptation. Added to this are the rising tensions in various parts of the world, including Ukraine and the Middle East, all adding further pressure on global supply chains and pressures on the economy that trickle down to citizens in all parts of the globe. For education, these dynamics have profound implications - for school funding, for family economic stress, and for the kind of skills and capabilities that learners will need to thrive.

6.1 **Cost of living crisis and family economic stress.**

Rising costs of food, fuel, housing, and essential services have placed enormous pressure on lower and middle-income families in New Zealand and globally. For education, this translates into reduced ability to participate in school activities, increased reliance on school-provided resources, and - critically - the cost of travel to school becoming a factor in attendance decisions. The integration of transport costs into thinking about hybrid and flexible learning is no longer optional for equity reasons alone.

6.2 **Fuel price volatility.**

Global oil markets have been significantly disrupted by geopolitical conflict, with flow-on effects for fuel prices in New Zealand. This directly affects the cost of school bus services, private transport to school, school camps and field trips, and the broader economic wellbeing of families in rural and low-income communities. It reinforces the case for hybrid learning as a resilience strategy rather than merely a convenience.

6.3 **AI and the future of work.**

The rapid advancement of generative AI has accelerated what was already a significant transformation of the labour market. While the 2022 Scan noted McKinsey's estimate that 800 million people could lose their jobs to automation by 2030, the emergence of large language models and generative tools capable of performing knowledge-work tasks has brought these forecasts closer to realisation. At the same time, new roles are emerging - and the skills premium is shifting decisively toward creativity, critical thinking, emotional intelligence, and AI literacy.

6.4 **Green economy transition.**

New Zealand's commitment to the Paris Agreement and the transition to a low-carbon economy continues to create both challenges and opportunities. New 'green jobs' - in renewable energy, sustainable agriculture, environmental management, and clean technology - require new skill profiles from the education system. Simultaneously, some traditional industries face significant disruption, creating workforce adjustment pressures in rural communities.

6.5 **International education as economic driver.**

New Zealand's international education sector is recovering strongly from the COVID-related collapse, with the government targeting $4.4 billion in international education revenue by 2027. This brings significant economic benefits - but also raises questions about the quality and sustainability of provision, the experience of international students, and the implications for domestic learners when institution funding becomes dependent on international enrolments.

6.6 **Economic inequality.**

Wealth inequality in New Zealand has continued to grow, with the gap between the highest and lowest income quintiles increasing. The impact on education is direct and measurable: children from economically disadvantaged backgrounds are significantly less likely to attend school regularly, achieve NCEA qualifications, or access post-secondary education. Any serious account of educational transformation must grapple with the economic structures that produce and perpetuate these disparities.

6.7 **Fiscal constraint and school funding.**

The government's programme of fiscal consolidation has placed pressure on education budgets, including reductions in some programmes and the restructuring of support services. Schools are navigating tighter operational funding while managing increasing demands - including from the implementation of new curriculum and assessment frameworks.

6.8 **Infrastructure and the physical vs. virtual investment question.**

The question of how to balance investment in physical school infrastructure against investment in digital infrastructure and virtual learning capability has become more pressing. Cyclone Gabrielle and other extreme weather events demonstrated both the vulnerability of physical infrastructure and the critical importance of being able to pivot to online/hybrid delivery. A sophisticated national strategy is needed that treats physical and digital infrastructure as complementary, not competing, investments.

7. Employment and the Workforce

The world of work is undergoing its most profound transformation since the Industrial Revolution, driven by the convergence of AI, automation, globalisation, and the green transition. Education systems that are primarily preparing young people for the jobs of today risk sending them into a labour market that will be dramatically different by the time they enter it.

7.1 **The AI disruption to employment.**

Since the 2022 Scan, the application of AI to knowledge work tasks has accelerated significantly. Large language models, generative AI tools, and AI-assisted workflows are transforming roles in law, accountancy, medicine, education, design, and many other fields. This does not mean mass unemployment - but it does mean a rapid restructuring of what skills are valuable and how work is organised. For education, this requires urgent attention to what we are teaching and why.

7.2 **New competency priorities.**

The World Economic Forum's Future of Jobs Report (2025) identifies the fastest-growing skills as including AI and big data literacy, leadership and social influence, creative thinking, resilience and flexibility, and systems thinking. Notably, the skills that are currently[2] most resistant to AI displacement are those grounded in human judgment, ethical reasoning, empathy, and contextual understanding - the very skills that a well-designed education system should be developing.

7.3 **The teacher workforce as a critical employment challenge.**

In New Zealand as globally, the teacher workforce is in a state of significant stress. Teachers are leaving the profession at rates that exceed the supply of new graduates from ITE (Initial Teacher Education) programmes. Secondary specialist subjects - mathematics, sciences, and te Reo Māori - face the most acute shortages. The causes are complex. Workload, pay, loss of professional autonomy, and the cultural and political pressures of the current moment all contribute. Without a credible response to the teacher workforce crisis, all other educational reforms are at risk.

7.4 **Gig economy and portfolio careers.**

Young people entering the workforce can expect multiple career changes and extended periods of portfolio work. This requires different skill foundations from those needed for stable, long-term employment - including entrepreneurship, financial literacy, self-management, and continuous learning capabilities. The NZ Curriculum's key competencies remain broadly relevant, but their expression in learning design needs to be more deliberate and consistent.

7.5 **The global talent market.**

New Zealand continues to compete for skilled workers in a global talent market. While the post-COVID return of many New Zealanders from overseas provided a temporary boost, structural skill shortages in engineering, healthcare, digital technology, and education persist. NZ's relative quality of life remains a draw - but cost of living and housing affordability have eroded some of this advantage.

7.6 **Teacher recruitment and retention.**

New Zealand's teacher workforce challenges are well-documented but have not yet been systematically resolved. The government has announced targeted initiatives, including pathway programmes for career changers and overseas-trained teachers, but the structural issues of workload, pay relativity, and professional respect remain significant. The implementation of new curriculum and assessment frameworks creates an additional pressure on teachers who may feel under-prepared or insufficiently supported.

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[2] Consider https://www.theguardian.com/technology/2026/apr/30/ai-outperforms-doctors-in-harvard-trial-of-emergency-triage-diagnoses

7.7 **Digital skills shortage.**

NZ Tech continues to identify a critical shortage of digitally skilled workers. As AI becomes embedded in most industries, the breadth of this shortage widens - it is no longer only about coders and software engineers, but about workers at all levels who can work effectively with AI tools, understand their limitations, and apply critical judgment to their outputs[3].

[3] See https://tuanz.org.nz/tuanz-launches-2026-digital-priorities-report-warning-of-growing-innovation-gap-for-new-zealand/

8. Technology

> *"The most powerful technology in human history is not the atomic bomb or the internet. It is a machine that can think - and it arrived in our classrooms while we were still arguing about whether to allow laptops."*
> *(Wenmoth, 2026)*

The technological landscape has shifted more dramatically between 2022 and 2026 than in any comparable four-year period in recent history. The emergence of generative AI as a mainstream, accessible technology represents a categorical shift - not merely an incremental advancement - in the relationship between humans and machines.

8.1 **Generative AI: a paradigm shift for education.**

The release of ChatGPT in November 2022 and the subsequent proliferation of large language models (LLMs) and generative AI tools has fundamentally disrupted assumptions about learning, assessment, and professional practice in education. Students can now generate essays, solve problems, write code, and produce images at a level of sophistication that makes traditional assessment tasks - if unchanged - essentially meaningless. At the same time, these tools offer extraordinary potential for personalised learning, differentiated support, and creative exploration. The challenge for education is not whether to engage with AI, but how to do so in ways that develop rather than diminish human capabilities.

8.2 **AI literacy as a core competency.**

Just as digital literacy became a recognised necessity in the 2010s, AI literacy - the ability to understand, critically evaluate, and work effectively with AI tools - has become a core competency for the 2020s and beyond. This includes understanding how AI systems work (at a conceptual level), the nature and sources of their biases, the ethical dimensions of their use, and how to leverage them as tools for augmenting human thinking rather than replacing it.

8.3 **Hybrid and flexible learning platforms.**

The pandemic catalysed the adoption of hybrid learning tools, and the 2022–2026 period has seen these mature significantly. Video conferencing, asynchronous learning platforms, digital collaboration tools, and AI-assisted tutoring systems have all advanced. More importantly, pedagogical understanding of how to design effective hybrid learning experiences has also deepened. Hybrid learning is increasingly understood not as a compromise but as a genuine pedagogical model with distinctive affordances - particularly for learner flexibility, geographic inclusion, and resilience planning.

8.4 **Cyber security: an elevated and evolving threat.**

The cyber threat landscape has intensified significantly, with AI-assisted attacks - including highly convincing phishing campaigns, AI-generated disinformation, and automated vulnerability probing - presenting new challenges for schools and educational systems. The data schools hold on students and families is of high value to malicious actors, and the consequences of a successful attack extend well beyond operational disruption.

8.5 **Internet connectivity: the persisting digital divide.**

While New Zealand's UFB rollout has achieved high penetration rates in urban areas, significant connectivity inequities persist in rural and remote communities. The shift toward AI-powered and cloud-based learning tools - which are inherently bandwidth-intensive - risks deepening this divide unless active mitigation strategies are in place. While all schools in NZ are connected to the Internet, many homes aren't, which becomes problematic when considering the potential of hybrid learning. Connectivity should be treated as essential infrastructure.

8.6 **Data analytics and personalised learning.**

The maturation of learning analytics platforms, combined with AI-assisted data interpretation, is enabling more sophisticated approaches to tracking and responding to student progress. When implemented well - with appropriate ethical guardrails and teacher agency at the centre - these tools have genuine potential to support more personalised and responsive teaching. When implemented poorly, they risk reducing learners to data points and undermining professional judgment.

8.7 **Virtual and augmented reality.**

VR and AR technologies have continued to mature, and applications in education - from virtual field trips to immersive historical simulations to vocational training environments - are becoming more accessible and pedagogically sophisticated. These technologies are particularly promising as partial substitutes for physical excursions and travel-intensive activities in an era of rising fuel costs and climate consciousness.

8.8 **Renewable energy and school sustainability.**

New Zealand's electricity grid is already predominantly renewable, and the electrification of school transport and heating systems is proceeding. Schools that invest in solar generation and energy efficiency improvements are both reducing their operational costs and modelling sustainability practices for their communities.

8.9 **NZ government's approach to AI in education.**

The Ministry of Education has issued guidance on the use of generative AI in schools, but sector feedback has been that the policy environment remains insufficiently developed relative to the pace of adoption. Many schools are navigating AI policy in the absence of a coherent national framework, with inconsistent approaches across the system. This is an area requiring urgent attention.

8.10 **Digital Technologies curriculum.**

The Digital Technologies and Hangarau Matihiko curriculum strand, introduced in 2020, remains in the curriculum framework - but concerns have been raised about the consistency and quality of its implementation, and about the supply of teachers with the required expertise to teach it effectively. As AI literacy becomes an urgent priority, the demand on this curriculum space will only increase.

9. Legal Landscape

The legal and regulatory environment for education continues to evolve in response to technological change, political priorities, and shifting social norms. In New Zealand, the current legislative reform programme represents the most significant change to the legal framework for education in many years.

9.1 **AI regulation and intellectual property.**

Globally, jurisdictions are grappling with how to regulate AI in ways that protect citizens, preserve competition, and support innovation. The EU AI Act (2024) established the most comprehensive regulatory framework to date, with implications for EdTech companies operating in the European market. In New Zealand, AI regulation is less developed, but is increasingly on the policy agenda. Critical issues for education include: who owns AI-generated student work; how AI use in assessment should be treated; and what data protections apply when student information is processed by AI systems.

9.2 **Data privacy and student information.**

The protection of student data - including learning analytics, assessment data, and behavioural records - is a growing area of legal and ethical concern. As AI-powered platforms become more embedded in school operations, the amount and sensitivity of student data being collected increases significantly. Parents, students, and educators need clear frameworks for understanding what data is collected, how it is used, and by whom.

9.3 **Copyright in the age of AI.**

The use of AI tools to generate text, images, and code raises complex questions about intellectual property that existing copyright frameworks were not designed to address. For schools, practical questions include: can students submit AI-generated work for assessment? Who owns content created by a student using an AI tool? How should schools handle AI-generated materials in their own resources and communications?

9.4 **Online safety and platform regulation.**

The regulation of social media platforms and online environments - particularly in relation to harm to children and young people - has become a more active area of legislation in many countries. New Zealand's Harmful Digital Communications Act has been under review, and the government has signalled interest in stronger platform accountability measures. For schools, this intersects with policies on student device use, social media, and digital citizenship education[4].

9.5 **Education and Training Amendment Act.**

The current government's amendments to the Education and Training Act have generated significant controversy, particularly regarding the proposed reduction in statutory requirements relating to Māori language, culture, and student rights. Critics argue these changes undermine the bicultural foundations of New Zealand education and the rights of ākonga Māori. Supporters argue they simplify the legislative framework and return focus to core educational outcomes. The implications for schools - particularly in terms of their obligations to Māori learners and communities - are still being worked through.

9.6 **Charter school legislation.**

The reintroduction of charter schools has required new legislative frameworks governing their establishment, funding, accountability, and governance. Questions remain about how these schools will be inspected and held accountable, and how their performance will be evaluated relative to the wider system.

[4] For examples of approaches to digital citizenship see https://netsafe.org.nz/schools-and-kura

9.7 **Curriculum and assessment regulation.**

The government's decision to mandate specific pedagogical approaches - particularly in literacy and mathematics - represents a significant expansion of regulatory reach into what has traditionally been considered professional practice. This raises important questions about the relationship between government, the Teaching Council, and the professional autonomy of educators.

10. Environmental Landscape

The environmental landscape has moved from a background concern to a foreground reality for New Zealand education. Cyclone Gabrielle in February 2023 - the most costly natural disaster in New Zealand's recorded history - was a pivotal moment for the sector, demonstrating in visceral terms the vulnerability of school infrastructure, the critical importance of hybrid learning capacity, and the inadequacy of existing emergency response protocols.

10.1 Climate change: from trend to lived experience.

For New Zealand schools, climate change is no longer a distant, abstract threat - it is an immediate operational reality. The 2023 cyclone season, recurrent flooding events, drought conditions in eastern regions, and increasing wildfire risk in dry summers are all tangible manifestations of a changing climate. Schools are dealing with the consequences in multiple ways: through physical damage to buildings and grounds; through the emotional and psychological impact on students and staff in affected communities; and through the increasing frequency of unplanned closures.

10.2 Hybrid learning as a climate resilience strategy.

One of the clearest lessons from the 2023 cyclone events was that schools with established hybrid learning capability were able to continue educational provision far more effectively than those relying entirely on physical attendance. This makes investment in hybrid learning infrastructure and pedagogy not merely a matter of educational innovation, but of risk management and community resilience. Schools that cannot pivot to online delivery when their buildings are inaccessible are increasingly vulnerable.

10.3 Rising fuel costs and school attendance.

The combination of global oil market volatility and NZ's relatively high transport costs creates a direct link between fuel prices and school attendance - particularly in rural areas and for families in financial stress. As fuel costs increase, the cost-benefit calculation of travelling to school shifts. Hybrid and flexible learning options reduce this barrier, making them an equity strategy as much as a resilience strategy.

10.4 Biodiversity and environmental sustainability in curriculum.

There is growing expectation that schools will integrate environmental literacy - including climate science, biodiversity, and sustainability - across the curriculum in meaningful ways. The challenge is to do this in ways that are age-appropriate, scientifically accurate, and empowering rather than anxiety-inducing. Schools in Aotearoa New Zealand have the additional resource of mātauranga Māori - indigenous ecological knowledge - to draw upon, though current legislative trends may affect how prominently this can feature in the curriculum.

10.5 School infrastructure and environmental risk.

A significant proportion of New Zealand's school building stock is located in areas of elevated environmental risk - coastal zones, flood plains, and areas susceptible to landslip. The long-term strategy for school property investment must increasingly account for climate risk, with decisions about maintenance, upgrade, and new construction made in the context of projected sea-level rise, flood frequency, and changing rainfall patterns.

10.6 Digital infrastructure as environmental infrastructure.

Just as roads and buildings are considered essential infrastructure, reliable high-speed internet connectivity is now a prerequisite for educational resilience. The argument for treating broadband as critical social infrastructure - with public investment obligations similar to those for roads and utilities - is strengthened by every climate-related school closure.

10.7 Cyclone Gabrielle and systemic lessons.

The February 2023 cyclone had devastating impacts on schools in Hawke's Bay, Tairāwhiti, and other affected regions. Some schools were closed for weeks; others lost irreplaceable resources and faced significant emotional trauma within their communities. The disaster exposed gaps in emergency planning, insurance coverage, and the ability to continue learning remotely. It also highlighted the extraordinary resilience and community spirit of affected school communities - and the critical importance of pastoral care in the recovery process.

10.8 Environmental policy under the current government.

The National-led government has signalled a more business-friendly approach to environmental regulation, including the fast-tracking of infrastructure projects and a recalibration of some emissions reduction targets. This has been welcomed by some economic sectors but criticised by environmental groups. For education, the policy context affects both the messages schools receive about environmental responsibility and the resources available for environmental education initiatives.

11. Social Landscape

The social environment in which New Zealand schools operate has become more complex, more stressed, and in some ways more polarised than the 2022 scan identified. The intersecting pressures of economic inequality, post-pandemic adjustment, political division, and the pervasive influence of social media on young people's development and identity all shape the context in which teachers and school leaders work. The 2026 Social Cohesion report[5] suggests these factors all contribute to the identification of three distinct groups of people in our society – and these are likely reflected in all of our school communities.

11.1 **Youth mental health.**

The mental health of children and young people has continued to deteriorate since 2022, with increased rates of anxiety, depression, and eating disorders - particularly among adolescent girls. The relationship between social media use and youth mental health has been the subject of growing research and policy attention internationally, with some jurisdictions moving to restrict smartphone use in schools. In New Zealand there is now a government mandate for schools to enforce phone-free policies, with generally positive feedback from both students and teachers - though the policy debate continues.

11.2 **Social media and identity formation.**

Platforms such as TikTok, Instagram, YouTube, and Snapchat play an enormous role in the social lives, identity formation, and information environments of young people. The algorithms that drive these platforms are designed to maximise engagement - which means they preferentially surface content that is emotionally arousing, divisive, or extreme. For educators, this means students are navigating information environments that are in many respects hostile to the kind of careful, nuanced thinking that good education seeks to develop.

11.3 **Changing demographics.**

New Zealand's population continues to diversify, with growth in Asian and Pacific communities and increasing diversity in religious and cultural backgrounds. This diversity is both a strength and a challenge for schools - requiring culturally responsive practice, community engagement, and a commitment to inclusive learning environments. At the same time, demographic change is reshaping regional patterns of school enrolment, with some communities facing declining rolls while others struggle with rapid growth.

11.4 **Housing, poverty, and educational disadvantage.**

The relationship between housing instability and educational disadvantage is well-established and remains a profound challenge in New Zealand. Children who move frequently, live in overcrowded housing, or lack stable access to basic necessities are at significantly elevated risk of educational disengagement and underachievement. The current government's housing policies have produced mixed results, and child poverty indicators remain deeply concerning.

11.5 **Polarisation and the challenge of cohesion.**

Both globally and in New Zealand, social and political polarisation has intensified. For schools - which are constitutionally committed to providing balanced, inclusive education for diverse communities - navigating this polarisation is a genuine challenge. Teachers report increasing difficulty in discussing contested social and political issues in classrooms, particularly when communities are divided along political lines.

[5] https://www.helenclark.foundation/research/social-cohesion-in-new-zealand-2026

11.6 **Bicultural Aotearoa in a contested moment.**

The relationship between Māori and the Crown - and by extension, the place of te Tiriti o Waitangi in the governance of public institutions - is at a point of significant contestation. The government's approach to Treaty principles, including its Treaty Principles Bill (subsequently defeated), and changes to education legislation have been experienced by many Māori communities as a regression. At the same time, genuine progress on Māori achievement, Te Reo revitalisation, and rangatahi leadership continues in many communities and kura. Schools must navigate this contested terrain with care, grounded in relationships, genuine cultural competence, and a commitment to rangatiratanga.

11.7 **Pacific community strengths.**

Pasifika learners and communities bring extraordinary strengths to New Zealand education - including strong values of service, community, and collective responsibility; cultural richness; and growing leadership in multiple sectors. Outcomes for Pasifika learners, while still below the system average in many measures, have shown improvement in some areas. The Pacific Education Plan framework continues to provide useful guidance, though funding and support for its implementation needs sustained attention.

11.8 **Refugee and migrant learners.**

New Zealand continues to receive refugee and migrant families from a range of conflict and crisis contexts. Schools with high proportions of recently arrived students face significant challenges - including language support, trauma-informed practice, and the integration of students with interrupted schooling. These challenges are also profound opportunities to develop the intercultural competence and empathy that a globally oriented education requires.

12. Education

The education landscape in 2026 reflects the cumulative impact of global trends, technological disruption, and specific national policy choices. Several themes have emerged as particularly significant for New Zealand's educational direction.

12.1 Science of Learning and structured approaches.

The most significant pedagogical shift in New Zealand education in the 2022–2026 period has been the government's embracing of the 'Science of Learning' as the evidential foundation for curriculum and pedagogy. This has manifested in the mandating of structured literacy (based on the Reading Wars research resolving firmly in favour of systematic phonics instruction) and structured mathematics approaches. These mandates are claimed to be grounded in genuine research evidence and while they have been welcomed by many teachers and parents, questions remain about implementation quality, teacher professional learning support, and the risk of a narrow interpretation that excludes other valuable learning approaches.

12.2 Generative AI and the reinvention of assessment.

The educational assessment landscape faces an existential challenge from generative AI. Traditional essay-based, take-home assignment formats are now effectively compromised as valid assessments of individual student capability. Schools and examination systems globally are responding in different ways - from banning AI use (largely unenforceable) to redesigning assessments around AI-assisted work, to returning to oral and in-person assessment. In New Zealand, the NCEA review has had to incorporate AI considerations, and the sector is in active dialogue about what authentic assessment looks like in an AI-saturated environment.

12.3 Hybrid learning: from emergency to strategy.

What began as an emergency response to COVID has evolved - in the most forward-thinking institutions - into a deliberate pedagogical and operational strategy. Hybrid learning is not 'online learning with students at home'; it is a sophisticated approach to learning design that leverages the complementary strengths of physical and virtual environments. Its relevance in 2026 is driven by: climate resilience (maintaining learning during extreme weather events); equity and access (reducing transport and cost-of-living barriers); student wellbeing (offering flexibility during periods of illness or family stress); and pedagogical innovation (enabling access to expertise and communities beyond the local). Schools that have invested in hybrid capability - including both infrastructure and teacher professional learning - are significantly better positioned.

12.4 Curriculum reform and the knowledge-competency balance.

The pendulum in NZ curriculum design has swung toward a more explicit knowledge-rich approach, reflecting concerns that the previous curriculum framework - while admirable in its competency orientation - led to inconsistent depth of content knowledge across the system. The challenge going forward is to hold both: a knowledge-rich foundation AND the development of transferable competencies[6]. The most effective school systems globally - including those in Singapore, Finland, and Canada - demonstrate that this is achievable and should be the aspiration for Aotearoa[7].

12.5 NCEA replacement confirmed.

NCEA will be phased out between 2028 and 2030[8]. In March 2026, Education Minister Stanford confirmed the Government will proceed with replacing all three levels: a Foundational Skills Award (literacy and numeracy) at Year 11 from 2028, the New Zealand Certificate of Education at Year 12 from 2029, and the New Zealand Advanced Certificate of Education at Year 13 from 2030. Students will be required to study five subjects and pass at least four, with results reported as letter grades (A–E).

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[6] https://www.oecd.org/content/dam/oecd/en/about/projects/edu/education-2040/publications/section_5.pdf

[7] https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/12/curriculum-reform_16f39dcc/efe8a48c-en.pdf

[8] https://www.education.govt.nz/news/ncea-update-structure-new-qualification-system-agreed

The professional debate that characterised NCEA has not been resolved by this decision - it has intensified. Equity concerns remain live, with many secondary school principals publicly opposing the changes on the grounds that a higher-stakes, subject-based model risks disadvantaging Māori, Pasifika, and learners from lower socioeconomic backgrounds. How the new qualifications signal achievement to employers and tertiary providers will require close monitoring as implementation proceeds.

12.6 **Learner wellbeing as foundational.**

There is now wide acceptance - evidenced by both research and lived experience - that learner wellbeing is not a 'soft' additional concern but a foundational prerequisite for effective learning. Schools that invest in wellbeing infrastructure - counselling, pastoral systems, restorative practices, and community connections - are not trading off academic outcomes; they are enabling them. The challenge in 2026 is resource: wellbeing support demand is outstripping supply in many schools.

12.7 **Teacher professional learning and the structured curriculum.**

The mandating of new curriculum and pedagogical approaches has created a significant professional learning challenge. Many teachers - particularly those trained in more constructivist pedagogical traditions - need genuine, high-quality support to implement structured approaches with fidelity and effectiveness. This requires investment in professional learning that is: sustained over time, grounded in practice, and delivered by people with credibility and expertise. 'One-off PD days' are not adequate to the scale of the change required.

12.8 **Global citizenship and local identity.**

In a polarised and interconnected world, education must hold together two complementary imperatives: a deep grounding in local identity, culture, and place; and the capacity to engage effectively and empathetically with a diverse global community. For Aotearoa New Zealand, this means honouring the bicultural foundations of the nation - including te ReoMāori and mātauranga Māori - while also preparing young people for a world in which global collaboration, intercultural competence, and cosmopolitan values are increasingly essential.

The New Zealand Context: Key Developments 2022–2026

- **Structured curriculum.** Mandating of structured literacy and structured mathematics from 2023–2024, representing the most significant government intervention in classroom pedagogy in NZ history.
- **Curriculum revision.** Revision of the National Curriculum framework, moving away from the previous refresh's te ao Māori integration and toward a more traditional, knowledge-structured approach.
- **NCEA changes.** Changes to NCEA, including the introduction of a new Level 1 qualification structure and ongoing review of Levels 2 and 3.
- **Charter schools.** Reintroduction of partnership schools (charter schools) from 2024.
- **Legislative reform.** Significant legislative amendments to the Education and Training Act, with contested provisions relating to Māori language and student rights.
- **International education recovery.** Growth in international student numbers post-COVID, with government targeting $4.4B in international education revenue by 2027.
- **Climate events.** Increased frequency of climate-related school closures, with Cyclone Gabrielle (February 2023) as the defining event.
- **AI in education.** Growing sector adoption of generative AI tools, with policy frameworks still developing.
- **Teacher supply.** Continued and deepening teacher workforce shortages, particularly in secondary specialist subjects.

13. Environment Scan Summary Table

The following table provides a summary of key global trends and their NZ-specific expressions across the extended PESTLE framework:

Domain	Global Trends	NZ Context
Political	Democratic backsliding and populist nationalism Geopolitical conflict (Ukraine, Middle East) US-China strategic rivalry Disinformation and epistemic fragmentation	Major political reset post-2023 election Structured literacy/maths mandates Charter school reintroduction Contested Education Act amendments
Economic	Cost-of-living crisis; inflation and interest rates Fuel price volatility from geopolitical conflict AI disruption of labour markets Green economy transition	Fiscal constraint on education budgets Fuel costs affecting school attendance (esp. rural) International education recovery ($4.4B target) Growing inequality; child poverty concerns
Social	Youth mental health crisis Social media and algorithm-driven polarisation Refugee and migrant growth Housing instability and educational disadvantage	Treaty principles contestation Pacific community strengths and aspirations Growing cultural and religious diversity Phone-free school policies emerging
Technological	Generative AI: a paradigm shift AI literacy as core competency Hybrid/flexible learning maturation Escalating cybersecurity threats (AI-assisted)	AI in education: policy gap Digital Technologies curriculum: implementation challenges Persistent rural connectivity gaps Growing VR/AR applications
Legal	AI regulation (EU AI Act and emerging frameworks) Data privacy and student information Copyright and AI-generated content Online safety and platform regulation	Education Act amendments (contested) Charter school regulatory frameworks Pedagogical mandate and teacher autonomy questions Harmful Digital Communications Act review

Domain	Global Trends	NZ Context
Environmental	Climate events increasing school disruption Hybrid learning as resilience strategy Fuel costs and attendance equity Net-zero transition and green jobs	Cyclone Gabrielle (2023) as defining event Climate infrastructure risk for coastal schools Environmental literacy in curriculum Mātauranga Māori as ecological resource
Education	Redefining 'success' beyond academic achievement toward competency and human flourishing Generative AI forcing fundamental redesign of curriculum, pedagogy, and assessment Science of Learning reshaping instructional approaches and curriculum design globally Growing recognition that learner wellbeing is foundational to - not separate from - achievement Tension between economic drivers of education and the broader goal of enabling young people to thrive	Mandated structured literacy and mathematics - the most significant pedagogical intervention in decades NCEA fitness for purpose in an AI-saturated environment actively questioned Persistent achievement gaps for Māori, Pasifika, and low-income learners remain the system's most urgent unresolved challenge Hybrid learning transitioning from emergency response to deliberate strategic and equity model Absence of cross-party, long-term educational strategy leaving the system vulnerable to reform-cycle disruption

14. Key recommendations for system leaders

14.1 Build the capacity to hold complexity

The PESTLE framework in this scan deliberately separates the landscape into distinct domains. That structure is analytically useful. But as Section 3 of this document argues, following the Future Today Strategy Group's insight, the future does not arrive domain by domain. It arrives as a convergence of several factors - geopolitical pressure, economic constraint, technological disruption, climate reality, social fracture, and legislative change - all simultaneously, all interacting, all amplifying one another.

The leader who approaches 2026 with a single-domain lens - focused only on curriculum implementation, or only on technology adoption, or only on wellbeing - will find themselves perpetually surprised by the ways that forces outside their frame of reference reshape the terrain beneath their feet. The AI tool that changes how students complete assignments is also an equity issue (who has access?), a legal issue (whose data is it?), a workforce issue (who has the professional learning to use it well?), and a social issue (what does it mean for the development of human capability and connection?). These dimensions do not sit in separate boxes. They converge.

Holding complexity means developing the cognitive and institutional capacity to act on multiple fronts simultaneously - not sequentially. It means being able to implement a government-mandated structured literacy programme with rigour and fidelity, while simultaneously ensuring that the programme is implemented in ways that are culturally responsive to Māori and Pasifika learners. It means investing in hybrid learning infrastructure for resilience reasons, while also ensuring that technology adoption serves human connection rather than eroding it. It means being financially prudent in a climate of fiscal constraint, while refusing to cut the pastoral and wellbeing supports that are, for many students, the difference between engagement and disengagement.

None of these tensions resolves neatly. That is the point. The leader who waits for clarity before acting will wait indefinitely. The leader who acts without acknowledging complexity will cause harm they did not intend. The work of educational leadership in 2026 is to act wisely, in conditions of irreducible complexity, with the wellbeing of every learner as the non-negotiable compass bearing.

14.2 Plan for a long-term, cross-party commitment to education

There is, however, a deeper structural challenge that no individual school leader - however wise, however capable of holding complexity - can resolve alone. And this scan would be incomplete without naming it directly.

Almost every significant issue identified in this document - the teacher workforce crisis, the persistent achievement gaps for Māori and Pasifika learners, the need for hybrid learning infrastructure, the challenge of AI in education, the long-term resilience of school buildings against climate risk, the development of genuine digital equity - shares a common characteristic: it cannot be meaningfully addressed within a single three-year parliamentary term.

These are not problems that a well-designed policy, announced in a Budget and implemented over an electoral cycle, can solve. They are structural, generational challenges that require sustained investment, consistent direction, professional trust, and institutional patience over periods of ten, fifteen, or twenty years. They require the kind of commitment that outlasts governments.

And yet the dominant rhythm of educational policy in New Zealand - and in most comparable democracies - is the electoral cycle. Each incoming government arrives with a mandate, a set of priorities, and a genuine desire to improve the system. Each outgoing government leaves behind a landscape of partially implemented reforms, disrupted initiatives, and a workforce that has learned - through hard experience - to wait out policy change rather than invest deeply in it. The cumulative effect of this cycle is not stagnation, but something almost worse: perpetual motion without sustained progress. Schools are always moving, always adapting, always absorbing the next wave of change - but never quite arriving at the sustained improvement that the effort should produce.

The 2022 environment scan noted that New Zealand's education system is highly decentralised, with pockets of excellence but insufficient system coherence. That observation remains true in 2026. What has changed is the urgency. The convergence of forces described in this document - AI disruption, climate pressure, teacher workforce crisis, entrenched inequity, geopolitical instability - means that the cost of continued short-termism is rising rapidly. We can no longer afford a system in which the strategic direction of education is reset every three years according to the priorities of whichever party holds the Treasury benches.

> *The challenges facing New Zealand education in 2026 are not Labour challenges or National challenges. They are generational challenges - and they demand a generational response.*

What is needed is a cross-party commitment to an agreed long-term strategic trajectory for education in Aotearoa New Zealand: a set of enduring goals, grounded in evidence and shaped by genuine community engagement, that successive governments commit to sustaining regardless of which party holds power. This is not a naïve suggestion. It has precedent. New Zealand's Superannuation Fund operates on exactly this principle - insulated from short-term political interference, guided by an agreed long-term mandate, and consequently able to make decisions that deliver results over the decades-long horizon they require.

Such a commitment would require more than goodwill - it would need structural mechanisms to give it durability. These would include...

- Agreeing on a set of **protected principles** - values and commitments that sit above the policy preferences of any single government and cannot be quietly dismantled when the political wind changes.
- Establishing agreed **progress measures** that survive changes in government: indicators of equity, achievement, wellbeing, and workforce health that are reported against consistently, regardless of who holds the Treasury benches.
- Ensuring **independent monitoring and public reporting** - an authoritative, non-partisan voice that holds the system accountable to its long-term goals in the way that, for example, the Productivity Commission[9] or the Climate Change Commission holds other policy domains accountable.
- Planning for a **staged implementation** and review points that allow for adaptation without wholesale reversal - building in the flexibility to learn and adjust without abandoning the trajectory.
- Working in **genuine partnership**: with iwi, with the profession, with communities, and with the full range of government-linked education agencies - not as consultees at the margins of decision-making, but as co-architects of the shared framework. A commitment of this kind is not a constraint on democratic government; it is an expression of it - a decision by successive parliaments to honour an obligation to the next generation that no single term of office is long enough to fulfil alone.

Such a commitment would not require all parties to agree on every policy. Genuine political difference about method, priority, and emphasis is healthy and necessary in a democracy. What it requires is agreement on the destination: that every child in Aotearoa New Zealand, regardless of their background, their location, their ethnicity, or their economic circumstances, deserves an education that equips them to flourish in the world they will actually inhabit. And agreement that the institutional knowledge, professional trust, and sustained investment required to deliver on that destination will not be dismantled when the political wind changes.

The teaching profession itself has a role to play here. A workforce that is constantly adapting to policy reversals cannot develop the deep professional expertise that transforms educational outcomes. The

[9] Reference here to the productivity commission is to illustrate the potential role of such a body, however the Productivity Commission in New Zealand was disestablished by the current government in 2024 (https://www.treasury.govt.nz/information-and-services/nz-economy/productivity/productivity-commission-2011-2024_)

relationship between government and the profession needs to shift - from one of periodic mandate and compliance to one of sustained partnership, grounded in mutual respect, shared evidence, and genuine professional autonomy within an agreed framework. The Science of Learning research that informs current policy provides some value, but is very narrow in its view and fails to recognise a much broader and richer input sometimes referred to as the ‘sciences of learnings’ . The real value here will only be realised if teachers have the time, the support, and the professional security to implement it with depth and fidelity - not as a compliance exercise, but as a professional commitment.

The communities of Aotearoa New Zealand - and especially those communities whose children have been most consistently underserved by our education system - deserve better than a system whose direction shifts with each electoral cycle. They deserve a system that makes and keeps promises across time. Achieving that requires political courage from all parties: the courage to agree, in public and on the record, that some things matter more than political point-scoring, and that the education of the next generation is one of them.

> *The measure of a society's commitment to its future is not the policies it announces, but the investments it sustains. An education system worthy of Aotearoa New Zealand - and of the learners who depend on it - requires leaders at every level willing to act beyond their own tenure, in service of something larger and longer than any single term of office.*

15. Implications for Education Leaders

Drawing together the threads of this environment scan, the following broad implications emerge for education leaders in Aotearoa New Zealand as they plan for 2026 and beyond:

15.1 Invest in hybrid learning capability - now

Hybrid learning is no longer optional. It is a resilience strategy (climate/seismic events, illness, family financial stress), an equity strategy (reducing transport and cost barriers), and a pedagogical innovation strategy. Every school should have a credible plan for maintaining learning continuity when physical attendance is not possible - and that plan should be regularly tested, not merely documented.

15.2 Develop a whole-school AI strategy

Generative AI requires a coherent, principled response - not ad hoc individual decisions. School leaders should develop clear frameworks covering: student use of AI in learning and assessment; teacher use of AI in planning and professional practice; data privacy obligations when using AI tools; and how AI literacy will be taught. These frameworks should be developed with staff, students, and communities - and revisited regularly as the technology evolves.

15.3 Centre equity in every decision

The cost-of-living crisis, persistent achievement gaps for Māori and Pasifika learners, and the growing impact of family economic stress on attendance and engagement all demand that equity is not a peripheral consideration but is centred in every significant decision a school makes - from timetabling to technology investment to professional learning priorities.

15.4 Invest in teacher wellbeing and professional learning

The teacher workforce is under extraordinary pressure. Leaders who invest seriously in teacher wellbeing - through workload management, collaborative culture, genuine professional autonomy, and high-quality professional learning - will be better positioned to retain capable educators and attract the next generation into the profession.

15.5 Hold the knowledge-competency balance

The Science of Learning evidence for explicit instruction and knowledge-rich curriculum is real and should be taken seriously. But the deepest learning - learning that builds capability for an uncertain future - requires both a strong knowledge foundation and the development of higher-order thinking, creativity, collaboration, and ethical judgment. Schools that implement structured approaches with fidelity while also preserving space for inquiry, creativity, and student agency will be best positioned.

15.6 Cultivate relationships with community

In a polarised environment, schools are among the few institutions that retain significant community trust. That trust is built through genuine, sustained relationships - with whānau, with hapū and iwi, with local businesses, and with community organisations. Leaders who invest in these relationships - particularly in this contested political moment - will be building the social capital that makes all educational transformation possible.

> *Education in 2026 requires leaders who can hold complexity: implementing evidence-based practice while remaining pedagogically flexible; embracing AI while developing distinctly human capabilities; honouring national curriculum frameworks while remaining locally responsive; and navigating political turbulence while maintaining unwavering focus on the learning and wellbeing of every child.*

16. Using this scan: a practical guide for leaders

An environment scan is only as useful as the conversations it generates. This section offers a series of practical activities designed to help school leaders, boards, kura, and organisational teams move from reading to thinking - and from thinking to action. They are designed to be flexible. Some will suit a staff meeting, others may be better suited to a board workshop or leadership team retreat. None require specialist facilitation, though an experienced facilitator will deepen the quality of discussion.

(*For some of these activities you may find it helpful to use the Leaders Planning Tool on page 36*)

Activity 1: The Driving Forces Audit

Best for: *Leadership teams, senior staff, boards of trustees Time: 60–90 minutes*

Take a current change initiative, strategic priority, or persistent challenge your organisation is facing. It might be a curriculum shift, a wellbeing concern, a staffing issue, or a question about your community's changing needs.

Using the PESTLE framework from this scan, work through each domain as a team and ask: what external forces are driving or influencing this issue for us, right now, in our context? Not every domain will be equally relevant - and that itself is useful information. The goal is not to produce an exhaustive list, but to surface the forces that are most significant and least visible in your current planning conversations.

Capture your responses on a shared whiteboard or chart. Look for patterns: where are the forces clustering? Where are there connections you hadn't previously noticed? What does this suggest about the response your organisation needs to develop?

Activity 2: Our Burning Platforms

Best for: *Leadership teams, staff, community groups Time: 45–60 minutes*

This scan identifies four burning platforms at a national level. But burning platforms look different in different contexts - a rural kura faces different urgencies from a large urban secondary school; a small independent school faces different pressures from a primary school located in a lower socio-economic context for example.

Working in small groups, ask: which of the four burning platforms identified in this scan feel most urgent in our context - and why? Then ask a second question: are there burning platforms specific to our community or organisation that this scan doesn't name?

Bring the groups together to share and compare. Where there is consensus, that is a signal about shared priority. Where there is divergence, that is equally valuable — it surfaces the different realities that exist within your own organisation and community, and opens a conversation about whose urgency the organisation is currently organised around.

Activity 3: The Convergence Exercise

Best for: *Leadership teams, strategic planning workshops Time: 60–90 minutes*

One of the central arguments of this scan is that no trend arrives in isolation — forces converge, interact, and amplify one another in ways that make single-domain responses insufficient.

Choose two or three of the signals or trends identified in this scan that feel most relevant to your context. Map them on a large sheet of paper, leaving space between them. Then ask: how do these forces interact with each other in our setting? Draw lines between them and annotate what the interaction produces - does one amplify another? Does addressing one create a new challenge in another area?

The aim is not to produce a finished strategic plan, but to develop the habit of convergent thinking - the capacity to hold multiple pressures in view simultaneously and look for responses that address more than one challenge at a time.

Activity 4: Signals to Strategies

Best for: *Senior leadership teams, boards Time: 90 minutes–half day*

This activity moves from environmental awareness to strategic response. Working through the eight domains of the PESTLE framework, identify the three to five signals from this scan that your organisation judges to be most significant for your context over the next three to five years.

For each signal, work through three questions:

What does this mean for us specifically - our learners, our community, our staff?

What are we already doing that addresses this, even partially?

What is the most important thing we are not yet doing - and what would it take to start?

The output of this activity is not a finished strategy, but a prioritised set of strategic questions that can inform your next planning cycle. It is designed to complement, not replace, your existing strategic planning processes.

Activity 5: The Long View - A Conversation About What Matters Most

Best for: *Boards of trustees, community forums, iwi education authorities Time: 60–90 minutes*

This scan argues that the most significant challenges facing New Zealand education require commitment and consistency that outlasts any single government term - or any single leadership team. The same is true at the level of individual schools and organisations.

This activity invites your board or community to step back from operational concerns and ask a more fundamental question: what kind of school or organisation do we want to be in ten years' time, and what will it take to stay the course?

Use the burning platforms and long-term implications sections of this scan as a prompt. Identify the one or two commitments your organisation is prepared to make and sustain regardless of changes in leadership, staffing, or external policy direction. Consider what accountability mechanisms would help you honour those commitments over time.

This is a values conversation as much as a strategic one. It works best when it includes voices from beyond the leadership team - community members, whānau, and where appropriate, learners themselves.

A Note on Facilitation

These activities work best when participants have had the opportunity to read at least the Executive Summary and Summary Overview of this scan in advance. For deeper workshops, the relevant domain sections can be assigned as pre-reading to different members of the group, who then bring their domain to the full team - a useful way to distribute the reading load while building collective awareness.

If your organisation would like support in facilitating any of these activities, or in developing a more comprehensive environmental scanning process tailored to your context, please get in touch with FutureMakers. (email: derek@futuremakers.nz)

17. Leaders Planning Tool

PART 1 — Setting the Context	
Our focus *Name the issue, initiative, or challenge you are exploring today*	
Who is in the room? *Note the perspectives represented - and any that are missing*	

PART 2 — Driving Forces (PESTLE)	What signals from this domain are most relevant to our focus?	What does this mean for us in our context?	Convergence: how does this interact with other forces we have named?
Political			
Economic			
Social			
Technological			

Legal			
Environmental			
Education			
Employment			

PART 3 — Burning Platforms: local implications		PART 4 — What will we do? Our next steps	
AI disruption	**Teacher workforce crisis**	*What are the 2–3 priorities that emerge from this conversation?*	*Who will do what, and by when?*
Climate change / continuity of learning	**Cyber threats**	*What do we need to learn more about?*	*Who else needs to be part of this conversation?*

18. Key References and Further Reading

This environment scan draws on national and international literature across all domains. Key sources referenced include:

Global Frameworks and Research

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New Zealand Specific

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- Helen Clark Foundation (2026) Social Cohesion in New Zealand 2026 - https://www.helenclark.foundation/research/social-cohesion-in-new-zealand-2026

Technology and AI

- Brookings Institute (2026) A new direction for students in an AI world: Prosper, prepare, protect - https://www.brookings.edu/wp-content/uploads/2026/01/A-New-Direction-for-Students-in-an-AI-World-FULL-REPORT.pdf
- DemandSage (2025) 77 AI in Education Statistics 2026 (Global Trends & Facts) - https://www.demandsage.com/ai-in-education-statistics/
- European Commission. (2024). EU AI Act: Implications for Education. Brussels: EC.
- NECC (2024) Framework for AI-Powered Learning Environments - https://ncee.org/framework-for-ai-powered-learning-environments/

- OECD (2025) AI Literacy Project - https://ailiteracyframework.org/
- OECD (2026) – Digital Education Outlook 2026 - https://www.oecd.org/en/publications/oecd-digital-education-outlook-2026_062a7394-en.html
- UNESCO (2021) AI in education: guidance for policy makers - https://unesdoc.unesco.org/ark:/48223/pf0000376709

Climate and Resilience

- Earth Sciences NZ (formerly NIWA) (2025) Climate Change and Possible Impacts for New Zealand - https://niwa.co.nz/climate-change-information-climate-solvers/climate-change-and-possible-impacts-new-zealand
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Appendix One