

Cabinet Paper material

Proactive release

Minister & portfolio Hon Chris Hipkins, Minister of Education
Name of package Refresh of the New Zealand International Education Strategy 2022-2030
Date considered 3 August 2022
Date of release 16 August 2022

These documents have been proactively released:

Cabinet Minute: CAB-22-MIN-0299

Date considered: 8 August 2022

Author: Cabinet office

Cabinet Minute: SWC-22-MIN-0139

Date considered: 3 August 2022

Author: Cabinet office

Cabinet paper: Refresh of the New Zealand International Education Strategy 2022-2030 and Annex 1

Date considered: 8 August 2022

Author: Minister of Education

Some deletions have been made from the documents as the information withheld does not fall within scope of the Minister's portfolio responsibilities, and is not relevant to the proactive release of this material.

You can read the Official Information Act 1982 here:

<http://legislation.govt.nz/act/public/1982/0156/latest/DLM64785.html>



Cabinet

Minute of Decision

This document contains information for the New Zealand Cabinet. It must be treated in confidence and handled in accordance with any security classification, or other endorsement. The information can only be released, including under the Official Information Act 1982, by persons with the appropriate authority.

Report of the Cabinet Social Wellbeing Committee: Period Ended 5 August 2022

On 8 August 2022, Cabinet made the following decisions on the work of the Cabinet Social Wellbeing Committee for the period ended 5 August 2022:

Out of scope



SWC-22-MIN-0139

**Refresh of the New Zealand International Education
Strategy 2022-2030**
Portfolio: Education

CONFIRMED

Out of scope



Rachel Hayward
Acting Secretary of the Cabinet



Cabinet Social Wellbeing Committee

Minute of Decision

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Refresh of the New Zealand International Education Strategy 2022-2030

Portfolio Education

On 3 August 2022, the Cabinet Social Wellbeing Committee (SWC):

- 1 **noted** that in April 2022, SWC agreed to the release of the draft New Zealand International Education Strategy 2022-2030 (the Strategy) and noted that the Minister of Education intended to report back following consultation and finalisation of the Strategy [SWC-22-MIN-0068];
- 2 **noted** that the Minister of Education has refreshed the Strategy to reflect the 2022 operating environment for international education and embed a focus on high-value international education;
- 3 **noted** that:
 - 3.1 the Ministry of Education undertook public consultation during May and June 2022 on the draft Strategy;
 - 3.2 the Strategy has been amended to account for feedback received through the consultation process;
- 4 **noted** that a number of actions from the International Education Strategy 2018-2030 have not been included in the Strategy, as they have either been completed or are no longer relevant, and others have been amended for inclusion in the Strategy based on consultation feedback;
- 5 **noted** that new actions have been incorporated into the Strategy based on consultation feedback;
- 6 **noted** that the achievement of all actions within the Strategy requires an all-of-government collaboration and the Ministry of Education will coordinate the necessary relationships across government;
- 7 **noted** that the Minister of Education intends to launch the new Strategy at the Education New Zealand conference in the week of 15 August 2022;

8 **authorised** the Minister of Education to publish and release the new Strategy.

Rachel Clarke
Committee Secretary

Present:

Rt Hon Jacinda Ardern
Hon Kelvin Davis
Hon Dr Megan Woods
Hon Chris Hipkins
Hon Carmel Sepuloni (Chair)
Hon Andrew Little
Hon Damien O'Connor
Hon Peeni Henare
Hon Willie Jackson
Hon Jan Tinetti
Hon Aupito William Sio

Officials present from:

Office of the Prime Minister
Office of the Chair
Officials Committee for SWC

Proactively Released

In Confidence

Office of the Minister of Education

Cabinet Social Wellbeing Committee

Refresh of the New Zealand International Education Strategy 2022 – 2030

Proposal

- 1 This paper seeks agreement to publish and release the New Zealand International Education Strategy 2022-2030.

Relation to government priorities

- 2 This proposal aligns with the Government's plan Reconnecting New Zealanders to the World as it strengthens our international education. It also relates to the Government's priority of securing our economic recovery as it links to the recovery of the international education industry. It also aligns with the priorities within the Immigration Rebalance, which improves New Zealand's immigration system and ensures it delivers better outcomes for our communities and economy.

Background

- 3 In 2018, I released the latest New Zealand International Education Strategy 2018-2030 which set out the direction for international education. It reflected a sector that had grown rapidly and made a significant contribution to New Zealand's economy, but also one which was facing increased competition from other countries. It indicated a long-term direction move from international education as a revenue generating export industry, to focusing on quality of education, higher value, diversification, and benefitting all of New Zealand. It came after changes to regulatory settings aimed at improving the quality of international education provision to address previous poor performance.
- 4 I have refreshed the Strategy to reflect the 2022 operating environment for international education and embed a focus on high-value international education. The International Education Strategy 2022-2030 (the Strategy) sets out two focus areas for international education: helping providers to build back their onshore international offerings, and building capability and investment in a diversified international education future to deliver on the Strategy's vision and goals.
- 5 The Strategy's vision is 'a thriving and globally connected New Zealand through world-class international education'. It has three goals:
 - 5.1 Delivering an excellent education and student experience
 - 5.2 Ensuring international education is sustainable and resilient
 - 5.3 Developing global citizens.

- 6 The refresh also involved re-evaluating the original actions from the 2018 Strategy. Some of these actions had been completed, or were no longer relevant, so they are not included in the Strategy.
- 7 In March I presented a draft copy of the Strategy to Cabinet, seeking agreement to release it for consultation. Cabinet noted that I would report back to it following consultation and the finalisation of the New Zealand International Education Strategy 2022-2030 [SWC-22-MIN-0068].

I have completed public consultation

- 8 The Ministry of Education undertook public consultation from 13 May – 28 June 2022. This included online and in-person workshops, an online survey, and written submissions. Over 100 people registered to participate in workshops, and 30 completed survey responses and 12 written submissions were received. There were both individual responses and joint responses, including from international education peak bodies and the eight universities.
- 9 Overall, most people broadly supported the vision of the Strategy. Actions in the Strategy have been grouped around four themes: Focus Area One (helping providers build back their onshore offerings), and the three goals in Focus Area Two (which are outlined in paragraph 5).
- 10 Some submitters asked for the Strategy to include actions for Immigration New Zealand. The Ministry of Education worked with Immigration New Zealand to develop actions that will help to ensure important and relevant information about visa processing is shared with education providers, and to monitor immigration settings related to international education.
- 11 Successfully implementing the Strategy will require coordinated government actions that are supported by the sector. The Strategy includes actions across the range of agencies involved in international education including the Ministry of Education, Education New Zealand, Immigration New Zealand, the New Zealand Qualifications Authority, and the Tertiary Education Commission to help meet its goals.
- 12 Submitters stressed the need for student experience to be a focus throughout the Strategy, and that during the recovery it is important for government to focus on the students who are already onshore as well as on recruitment and building back numbers of international students.
- 13 There was strong support for improving global citizenship education in our education system.
- 14 There was also a strong preference expressed for focusing on onshore delivery as international education recovers. This will be a key part of the first Focus Area. Education New Zealand is piloting some different modes of delivery that utilise online and offshore delivery, and the lessons and evidence from these pilots will be used to inform ongoing online and offshore delivery.

The Strategy has been amended in light of feedback received

- 15 I have made changes to the Strategy (attached as Annex 1) to account for feedback received, where changes would help to achieve the vision and goals of the Strategy.
- 16 Some of the feedback did not align with the direction I have set for the sector – that international education will be of high-value, and that we want to attract international students because of the high quality of our education offerings, not because of the ability for graduates to work in New Zealand. I have not made changes based on this feedback.
- 17 I want to highlight some new actions from the draft I shared with you in April:
 - 17.1 I have added new actions to the Strategy related to immigration. These are largely intended to improve information-sharing between Immigration New Zealand and education providers regarding application processing, to ensure that prospective international students are getting accurate and up-to-date advice.
 - 17.2 I have also added new actions to the Strategy to support the experience international students have in New Zealand, and to support providers in developing global citizens.
 - 17.3 I have added new actions to contribute to the goal of ensuring international education is resilient and sustainable.
 - 17.4 I have also amended some actions in the Strategy, in order to strengthen them and ensure they will help to achieve the vision and goals of the Strategy.
 - 17.5 I have made changes to the Strategy narrative, in response to feedback that parts of it were unclear or that the sector did not interpret them in the way that was intended.

Release and publication of the Strategy

- 18 I intend to launch the finalised Strategy at Education New Zealand's annual conference, which will take place in the week of 15 August 2022. This will be a soft launch, as the content of the Strategy will have been finalised but it will not yet be publication ready.
- 19 I will then direct the Ministry of Education to undertake design and printing processes, and to publish the Strategy on its website.

Financial Implications

- 20 This proposal has no immediate financial implications. Existing Crown resources in the sector will be used to implement actions, including Education New Zealand's \$31.247 million baseline for international education programmes for the 2022/2023 financial year as well as CRRF funding of \$4

million for the diversification of products and services in the same financial year.

Legislative Implications

- 21 This proposal has no legislative implications. If future actions under the Strategy have legislative implications, I will bring them to Cabinet.

Population Implications

- 22 There are no direct implications for specific population groups.

Human Rights

- 23 This proposal has no inconsistencies with the New Zealand Bill of Rights Act 1990 or the Human Rights Act 1993.

Communications

- 24 The Ministry of Education will lead a communications and engagement process that will include those involved in international education.

Consultation

- 25 This paper was prepared by the Ministry of Education. The Ministry of Business, Innovation and Employment, Ministry of Foreign Affairs and Trade, Ministry for Pacific Peoples, Te Puni Kokiri, New Zealand Qualifications Authority, Tertiary Education Commission, Education Review Office, Immigration New Zealand and Education New Zealand were consulted in the development of this paper. The Department of Prime Minister and Cabinet was informed.

Proactive Release

- 26 I intend to proactively release this Cabinet paper subject to redaction as appropriate under the Official Information Act 1982.

Recommendations

The Minister of Education recommends that the Committee:

- 1 **note** that the Minister of Education has refreshed the New Zealand International Education Strategy 2022-2030 to reflect the 2022 operating environment for international education and embed a focus on high-value international education;
- 2 **note** that the Ministry of Education has undertaken a public consultation on the draft Strategy;
- 3 **note** that the new Strategy has been amended to account for feedback received through the consultation process;

- 4 **note** that a number of actions from the International Education Strategy 2018-2030 have not been included in the new Strategy, as they have either been completed or are no longer relevant; and others have been amended based on public consultation feedback;
- 5 **note** that some actions from the International Education Strategy 2018-2030 have been amended for inclusion in the new Strategy, based on public consultation feedback;
- 6 **note** that new actions have been incorporated into the refreshed International Education Strategy 2022-2030 based on public consultation feedback;
- 7 **note** that the achievement of all actions within the New Zealand International Education Strategy 2022-2030 requires an all-of-government collaboration and that the Ministry of Education will coordinate the necessary relationships across government where relevant;
- 8 **note** that the Minister of Education intends to launch the new Strategy at the Education New Zealand conference in the week of 15 August 2022;
- 9 **authorise** the Minister of Education to publish and release the new Strategy.

Authorised for lodgement

Hon Chris Hipkins

Minister of Education

International Education Strategy 2022 – 2030

Foreword

As I present this refreshed International Education Strategy, New Zealand is reconnecting with the world. Borders are open, and international education is ready to build back strong. The Government is committed to international education. International education has delivered a wide range of social, cultural and economic benefits to New Zealanders. Our classrooms, lecture theatres, workplaces and communities have been enriched by international education, which enables New Zealanders to successfully live, work and learn across borders and across cultures. It connects New Zealand to the world and helps to strengthen our overall reputation offshore.

The world we live in is changing. Technology is an integral part of the way new generations live, learn, work, and play, and means they are more globally connected than ever before. New international realities will continue to evolve, and to remain globally connected we will need new kinds of courage and creativity. We will need to identify opportunities to develop world-leading education products that are distinctly New Zealand. The international education landscape that we aspire to will look different to what we had in 2019, but I'm confident that we are all up for the challenge. I'm conscious, particularly, of the innovative use of digital delivery modes that are already proving successful. The pandemic has accelerated a lot of innovation, which will serve us well as we now begin to build back.

The Government wants the build back to support sustainable, resilient providers. This refreshed Strategy is the first step towards that. It sets out where government will put its focus in international education and the associated investment it will make over the lifespan of the Strategy. We need to build back a strong base and then we will be able to build a new future that is even better than what we had before.

COVID-19 has given us a window to ensure that we're clear about what high-quality and high-value international education looks like and that we are heading in that direction. Before the pandemic we were already in the process of change, working towards a shared vision of a diverse high-value, high-quality offering. Some parts of the sector had already started to build a more diversified and resilient sector, but we all need to contribute to work towards this goal.

New Zealand's response to COVID-19 has been internationally recognised. We are seen as a safe place to be, and as a country that highly values people's health and wellbeing, a place that people want to come to.

International education intersects with lots of different areas and government portfolios, and the Strategy presents a long-term vision that delivers on the Government's broader priorities, such as diplomacy and trade. I encourage agencies to consider what synergies there are for them, and how they can support the Strategy, starting with the build back.

I'm looking forward to working together in the coming years to rebuild a thriving, if a bit different, international education sector here in New Zealand.

AN INTERNATIONAL EDUCATION STRATEGY FOR NEW ZEALAND 2022 – 2030

This International Education Strategy enables international education to thrive and grow. It builds on New Zealand's quality education system and focuses on delivering good education outcomes for international students, global opportunities for domestic students and our educational institutions, as well as economic, social and cultural benefits for all of New Zealand.



Focus Area One: Help providers of international education to build back onshore offerings.

This phase responds to the immediate needs of providers and focuses on ensuring a sound base. It is short-term. The focus is on shoring up delivery, having regard for the three goals.

Focus Area Two: Building a new international education future.

This phase positions international education to step into a different future that is focused on high-value international education that benefits all New Zealanders. International education will grow and diversify, becoming more resilient and less reliant on onshore education delivery. This phase is medium to long-term. Activity in this space will demonstrably help us achieve our goals. There are also ongoing activities that will be undertaken during both phases to deliver on the Strategy.

Measures and indicators

To ensure we are on track, we will measure success in areas that link to our three overarching goals. One of our actions for Focus Area One is to develop a monitoring framework and useful indicators.

We do not yet know what an optimal base of onshore and offshore offerings is that will best support sustainability. These are things we will discover while we are building that base. At that point, we will also have a better idea of what the trajectories look like as we build the future for international education and what targets will be realistic and useful.

Introduction

This International Education Strategy (the Strategy) has a vision of ‘a thriving and globally connected New Zealand through world-class education’. It takes a broad view of ‘international education’ that encompasses providers, industries, communities, different modes of education delivery, research, New Zealand’s domestic education system and our international connections. International education is focused on high-quality and high-value education that benefits all of New Zealand, not just those within the sector. It will support the Government’s broader objectives, including those in diplomacy, research and trade. International education also includes offshore experiences for domestic students, through student exchanges, undergraduate and postgraduate study, research and internships.

The refreshed Strategy comes as New Zealand reconnects with the world, and we prepare to welcome international students again and New Zealanders are able to participate in offshore study experiences. It will help to guide the sector as it builds back its onshore delivery offerings and reconnects with international markets. This is Focus Area One of the Strategy – the build and recovery.

As we build back, it is an opportunity to craft a new future for international education that is sustainable, resilient and diversified. International education will embody high-value and benefit all New Zealand. This is Focus Area Two of the Strategy – building a new future for international education.

The sector had already begun to deliver on these goals pre-COVID-19 and we want to build on that good work. Education New Zealand Manapou ki te Ao has been piloting diverse delivery modes and testing different aspects of delivery. Updating the Strategy now has allowed us to incorporate this progress into the actions and set a clearer direction for the sector. The disruption of COVID-19 has set us on a faster track towards a high-value sector and given us an opportunity to become more focussed and targeted about how we deliver on the Strategy.

The Strategy sets out the Government’s vision for international education

The success of international education relies on students wanting to study with New Zealand, its wide range of providers, and system settings set by government. This is a government strategy, and the actions in it use the tools and levers available to government. The Strategy indicates where government will put its focus in international education and the associated investment it will make over the lifespan of the Strategy. It aims to give the sector certainty about what settings it will operate under and where it can put its own efforts and investment.

International education intersects with a range of government portfolios, particularly immigration, tourism, trade and foreign affairs. Achieving a thriving and globally connected New Zealand requires contributions from everyone involved in international education, such as tertiary education providers, schools, businesses, researchers, students and communities. This enables international students to benefit from the high-quality education and excellent student experience offered by New Zealand and build long-term global connections between New Zealand and the rest of the world. This Strategy is one contribution.

Government agencies will work together, and with the sector, to implement the Strategy

International education agencies will meet with each other regularly to discuss, plan, and review how we are implementing the Strategy.

We will engage with the sector on the development and implementation of policy, utilising the sector’s knowledge of what works and how things play out on the ground to inform our work. This will include

formal consultation, as well as informal discussions when it is timely. We will maintain relationships we have with the sector, with many international education agencies developing new relationships with parts of the sector they have not previously engaged with, including EdTech and education publishing. We want to have ongoing conversations with different aspects of the sector.

Immigration will be an important factor as we work to build back international education. Immigration New Zealand and the Ministry of Business, Innovation and Employment will work with education agencies on immigration settings that affect education, and to understand and share information about the processing of visa applications, including what a good application looks like and needs to include, and what processing timeframes are like.

New Zealand is reconnecting with the world

In 2022, our borders are opening and we are reconnecting with the world. Some international students have entered the country already, with small cohorts given special permission as a border-class exception. By the middle of 2022, students from visa waiver countries will be able to enter the country, as will those who already hold a valid visitor visa. Some students were in New Zealand when the pandemic began and renewed their visas before they left, and others had had visas granted but not travelled from their home country yet. They, too, will now be able to return to New Zealand. From 31 July 2022, normal visa processing resumed, enabling international students to enrol for study in New Zealand in 2023.

With New Zealanders now able to travel offshore, New Zealand students can also undertake a study experience in another country. Exporters of education products and services are able to travel to strengthen their relationships with their new and existing partners.

A changing global picture

International education operates in a global environment and its fortunes are highly sensitive to global activity and demographic and policy changes that affect the flow of international students. We have seen over the past two years how COVID-19 and the resulting border closures affected significant parts of international education, leaving prospective students offshore and leading to an increase in online teaching and learning. This has created new possibilities for ways of delivering education, and education sectors worldwide are exploring how they can be incorporated into education offerings as providers can now return to face-to-face learning.

China and India have been significant markets for New Zealand's and other countries' international education sector. The international education market is becoming more competitive as more countries are now offering international education, alongside the rising use of online channels to deliver education. In addition, more and more destination countries are adopting ambitious government-supported strategies and targets that are designed to maximise the economic and social benefits of international education.

The contribution that international education makes to New Zealand will rely on attracting students from a wider range of markets than we have previously. New Zealand has been increasing its focus on high-value, high-quality education, seeking to maximise and promote its high-value offerings, and attract students who want to benefit from the excellent education and student experience that we are known for. There are many opportunities for growth, and New Zealand must stay alert to these opportunities in both new and established markets and in a range of education products and services.

A high-value offering that benefits New Zealand

This Strategy recognises that the benefits of international education go beyond the national economy, and that it is of value to all New Zealand. It seeks to build on these communal benefits, building an industry that focuses on high-quality and high-value education, and to ensure that system settings are in place to provide broader benefits for students and for New Zealand.

New Zealand's 'high-value' offering will provide quality education that helps strengthen the education system, contributions to research and innovation, and other socio-cultural, economic and diplomatic benefits for New Zealand. When we can give students a high-quality, high-value experience, New Zealand experiences these benefits in return. Any international education offering should maintain, deepen or broaden one or more of the following values for New Zealand.

Educational value

International education enhances our education system by developing students' global citizenship and strengthening our education offerings. All students, both domestic and international, will gain the knowledge, skills and capabilities that they need to live, work and learn globally.

Integrating international students into New Zealand's education settings will support internationalisation in the New Zealand curriculum. This will allow all students to develop reciprocal relationships internationally and learn from each other's cultures, experiences and backgrounds.

International education also sees New Zealand students study abroad. A focus area for us is supporting and promoting opportunities to study abroad for all domestic students and providing targeted scholarships to groups who traditionally have had less opportunity. In particular, Māori, Pacific Peoples and disabled people have participated in outbound mobility at a proportionally lower rate than other domestic students. An equitable approach to international education would ensure that all learners have these opportunities to enrich their education and experiences.

Lastly, the additional revenue from international students, along with delivering cultural and social benefits, enables education providers to further develop the offerings they have for international and domestic students alike. In the tertiary sector, international students are also important because they can help ensure critical student mass that sustains parts of domestic offerings that align with areas where New Zealand is world-leading or where we offer a unique product of high-quality.

Longer-term economic value

International education boosts our economy by strengthening our research and innovation partnerships, our economic relationships and contribution to our human capital, knowledge and skills base development. This includes aligning any post-study work rights or other pathways to work in New Zealand with areas of skills needs with potential long-term economic returns to New Zealand.

International relations value

International education strengthens and diversifies our international connections, reputation, diplomacy and trade with a wide range of countries. This includes government-to-government diplomacy which helps New Zealand address wider goals and objectives, like meeting global environmental objectives. This also includes soft diplomacy on an education provider and education agents' level through, for example, knowledge exchange with international providers. It builds a global network of alumni with ties to New Zealand.

Socio-cultural value

International education benefits the wider community, providing international exposure to and understanding of New Zealand's culture and Te Ao Māori. It also exposes New Zealanders to different cultures to raise awareness, acknowledgement and respect for differences in background.

Immediate economic value

International education creates immediate financial benefits to New Zealand education providers, education agents and the wider community. This includes diversified revenue streams from international education fees, products and services. It also includes a positive impact on New Zealand's regional economies through wider international student spending, such as accommodation, travel, tourism and other expenditure.

Key areas that contribute to high-value international education

As we build the future for international education, we need to consider where we will be offering incentives to protect and enhance areas of high-value and where we will pivot and develop new offerings. The table below sets out areas that are important contributors to high-value.

Value	Students, offerings and markets
Educational value	<ul style="list-style-type: none">Markets that support outbound mobility for domestic students, including reciprocal arrangements between providers.Students interested in offerings that need a critical mass to increase choice for domestic students.Education offerings that align with key priorities or areas where New Zealand is world-leading or where we offer a unique product.
Long-term economic value	<ul style="list-style-type: none">Students that contribute to our international academic relationships that will feed into research and innovation.Students who strengthen New Zealand's long-term capability and capacity in areas of skill need.Students that may help New Zealand develop unique products and services.
International relations value	<ul style="list-style-type: none">Relationships with a range of priority countries that will support New Zealand's diplomacy, development objectives and trade opportunities/commitments overseas.Education offerings that contribute to addressing government's wider goals and objectives, like meeting global environmental objectives.Education offerings that contribute to a strong New Zealand international reputation.Students that support international connections through our global network of alumni with ties to New Zealand.Tertiary offerings where students start their New Zealand study experience offshore, including transnational education.
Socio-Cultural value	<ul style="list-style-type: none">Students who are interested and motivated to learn about New Zealand's culture and Te Ao Māori.Diversifying markets to contribute to increased cultural diversity in New Zealand.

Immediate economic value	<ul style="list-style-type: none"> • An optimal mix of markets, sectors, modes of delivery, products and services to diversify revenue streams to support New Zealand's economic resilience. • Long-term students (staying for multiple years) and ākonga/students who will likely pathway from one education provider to another. • Students who will be more evenly spread across the country to strengthen regional economic development. • Students who will likely spend in the community, including educational tourism, travel and accommodation. • Students who could contribute to skills needs during study.
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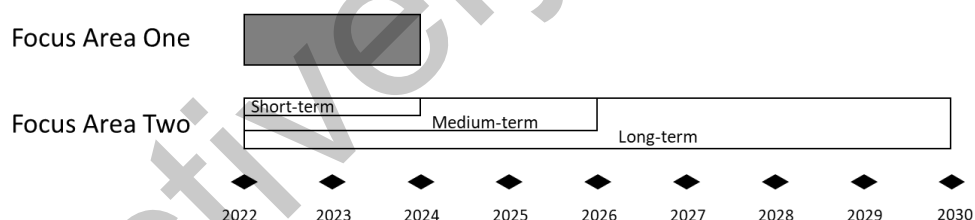
The Strategy has two focus areas and three overarching goals

The Strategy sets out two focus areas for government: helping international education to build back and recover from the border closures that occurred as part of New Zealand's response to COVID-19, and to build a new future for international education. This is to indicate where the Government's focus will be in the immediate and long-term. The two focus areas are simultaneous phases, but the first focus area will conclude earlier than the second.

Some actions will continue across the two focus areas. Many things that we consider are urgent and need to be immediate focuses (such as promoting New Zealand's brand and using evidence and research to inform ongoing development of international education) will become ongoing activity over the longer-term.

Timeframes

The actions are either short, medium, or long-term. Short-term actions will take place over 12-18 months, medium-term over three years, and long-term over eight years (to the conclusion of this Strategy).



Focus Area One: Build and recovery

There is an immediate need to build international education, and the first priority is to help providers rebuild their bases for onshore student delivery, and to rebuild sustainably so that international education can come back even better than it was before and give us the foundation we need to build a new future that is diversified, high-value and resilient.

Key actions:

Action	Agency	Timeframe
Build preference for and promote New Zealand's international education brand through marketing and public relations activity to attract learners to study with New Zealand	ENZ	Short-term
Use global brand research to inform a sustainable recovery	ENZ	Short-term
Refresh the Prime Minister's Scholarships for Asia and Latin America to create a more responsive scholarship programme and enhance connections and partnerships	ENZ	Short-term
Review the Education New Zealand Recognised Agency Programme to support building and thriving international education, ensuring that it is supporting high-quality agents who will support the sector's recovery	ENZ	Short-term

Develop a framework for evaluating how well New Zealand is implementing the NZIES and monitoring progress towards its three goals.	MoE	Short-term
Leverage other diplomatic reconnecting and travel activity to promote international education.	MoE, ENZ	Short-term
Undertake regular reporting to education providers on processing time of student visas across key stages of the visa application process	INZ/MoE/ENZ	Short-term
Provide information to education providers on visa processing time for complex markets	INZ/MoE/ENZ	Short-term
Establish guidance and forums on requirements for what constitutes a good applications with education providers and agents	INZ/ENZ	Short-term

Student recruitment is a big part of this. We will focus on the key connections and partnerships we have around the world to promote New Zealand's international education brand and let prospective students know that our high-quality education system is an option for them once again. We will also ensure we are providing timely, accurate information to prospective students, their families and agents to encourage study with New Zealand.

New Zealand was praised internationally for its handling of COVID-19, seen as a country that valued the health and wellbeing of those who live here. As the pandemic response continued, and other countries opened up to international travellers, some students began to view New Zealand less favourably and it was seen as 'closed'. As we reconnect with the world, we will focus on promoting New Zealand and letting our international partners and prospective students know that we are open again. We will continue to use research and our overseas connections and networks to understand how we are seen internationally, and what our outward messaging needs to focus on.

As international education opens back up there will be a focus on identifying and addressing provider capability needs to continue to offer high-quality programmes. We will work with providers to prioritise and respond to their needs.

People working in New Zealand who represent education products or services, such as publishers, can now travel overseas and reconnect with markets, including the new markets for education technology that have emerged in the past two years. They will be building new relationships, and strengthening existing ones which have only existed virtually, helping to build another part of the international education base.

We will actively look for opportunities to promote international education where there is other diplomatic travel as part of New Zealand's reconnecting with the world.

Focus Area two: Building a new future for international education

The international education future we are working towards will be different to what we had in 2019. As well as centring it on high-value, we will diversify the products, services and modes of delivery to create more sustainable and resilient provision and ensure that international education benefits New Zealand and New Zealanders long-term.

The direction we are heading in is not completely different to the direction we set in 2018. However, the shift towards high-value international education has been accelerated and this requires new action. We have the same goals, but the opportunities we see, and the way we will work towards them will look different.

Goal 1: Delivering an excellent education and student experience

What does success look like?

- International students receive a high-quality education
- International students are welcome and safe
- New Zealand delivers an excellent overall student experience

Key actions:

Action	Agency	Timeframe
Work with the New Zealand international education sector to identify and address its capability needs	ENZ	Short-medium term
Maintain the Education (Pastoral Care of Tertiary and International Learners) Code of Practice in line with the vision and aims of the International Education Strategy, including updated expectations for schools	MoE	Medium-long term
Explore options for the regulation of agents in order to improve and ensure quality of their service	MoE	Medium-long term
Ensure international students are aware of services and supports available to them, including how to access them. This will include undertaking a stocktake of supports available for international students and identifying any gaps.	ENZ	Short-term
Continue to rigorously monitor the quality of international education provision through programme monitoring, external evaluation and review and investigations, as necessary	NZQA	Ongoing
Continue research on the quality of the experience international students have when studying with New Zealand, and separately, how New Zealand's education is perceived internationally	ENZ	Ongoing
Deliver clear, timely and learner-focused information about studying with New Zealand education providers to learners, partners and agents	ENZ	Ongoing
Foster and maintain key connections and partnerships in targeted markets that contribute to a connected New Zealand	ENZ	Ongoing

International students receive a high-quality education

Our international reputation for quality has been built on the high standards of the best providers. Quality education is at the heart of what we do, and all providers have a critical role in delivering it.

To support the ongoing success of international education, we need to keep delivering high-quality education and make sure that we provide an excellent student experience, prioritise student wellbeing, and attract students who are looking for internationally recognised qualifications. We also need to make sure that New Zealand remains valued and recognised internationally for the quality of our qualifications, products, services, providers, educators and research.

International students come to New Zealand, often at considerable cost, for a limited period of time. Without the benefit of previous experience of New Zealand education, they rely on schools, providers and our regulatory settings to give them a high-quality education.

Government has an important role in setting clear guidelines on responsibilities for quality education, that is, education that prioritises student wellbeing and seeks good education outcomes. To protect students and preserve our reputation, we will make sure that we address quality issues quickly, efficiently and fairly.

International students are welcome and safe

We want all international students to have a great time living and studying in New Zealand, but we know that international students have unique challenges. They are in unfamiliar surroundings, often have English as a second language, and are far from family and social networks.

The International Student Wellbeing Strategy was developed to ensure that student wellbeing is at

the heart of our international education – that international students feel welcome and safe, enjoy a high-quality education and are valued for their contribution to New Zealand. It was developed with input from international students, education providers and community groups on what would make the biggest difference to international students' experiences in New Zealand. It sets out four focus areas that cover the whole international student experience, inside and outside the classroom – economic wellbeing, education, health and wellbeing, and inclusion. It can be used to guide local initiatives aimed at improving student wellbeing support – for example, initiatives that aim to provide international students with better information, lift the capabilities of those working with international students, and help international students to feel they belong and are engaged and connected.

Education providers will ensure students' safety and wellbeing in line with the requirements set out in the Education (Pastoral Care of Tertiary and International Learners) Code of Practice, as well as outcomes described in the Wellbeing Strategy. The Code of Practice must be embedded in all our systems.

New Zealand delivers an overall excellent international student experience

An excellent education goes beyond a person's learning in the classroom; it is their 'whole experience' as an international student and as a visitor in New Zealand. Providing students with new perspectives and truly authentic New Zealand experiences while they study is an important way to differentiate ourselves from our competitors.

International education providers can support this goal by delivering high-quality education and an excellent student experience and demonstrating their support for student wellbeing. International students will look back positively on their overall New Zealand experience, including in education, community engagement, quality accommodation and appropriate wraparound support.

Goal 2: Ensuring international education is sustainable and resilient

What does success look like?

- International education is a high-value, high-quality sector, sought out for its distinctive New Zealand proposition
- Regions throughout New Zealand increasingly share the benefits of international education
- The international education sector flourishes through diversification of markets, people flows and innovative products and services

Key actions:

Action	Agency	Timeframe
Promote New Zealand's high-value offerings in new and existing markets	ENZ	Short-medium term
Use COVID-19 Response and Recovery Funding to support the diversification of international education products and services, including assisting successful applicants of the Product Innovation Fund to create new products and services pilots, providing thought leadership for the sector, and exploring diversifying modes of education delivery	ENZ	Short-term
Build a greater understanding of the opportunities for the diversification of education products and modes of delivery across both the existing sector and potential new entrants	ENZ	Medium-long term
Explore whether English language schools should be considered as a distinct sub-sector of tertiary education	MoE	Short-term
Work with Te Pūkenga and other providers to strengthen vocational education opportunities for international students	MoE	Medium term
Regularly share market information and insights with the sector to inform its marketing and recruitment efforts	ENZ	Ongoing

Develop and support alumni networks in order to maintain connections with markets and promote New Zealand to prospective students	ENZ	Medium – long term
Monitor the impact of the immigration rebalance policy changes made for student visas, in particular the changes made regarding post-study work rights	INZ/MBIE/MoE/ENZ	Long-term
As the goals of the International Education Strategy and the Immigration Rebalance are realised, review the medium-term visa products for international students (e.g. the pathway visa)	MBIE/INZ/ENZ	Long-term

Sustainable, resilient international education is dependent on our delivering quality education and student wellbeing, connecting with a diversity of markets, producing innovative products and services, and taking account of immigration and labour market considerations. We need to prepare for students' appetite for travel to change and ensure the sector can flex to meet this. Some students may not want to travel as often or for as long while the global situation remains uncertain. There are likely to be more students who want to reduce their air travel because of the impact it has on climate change.

Prior to COVID-19, some providers had shown interest in online and offshore provision. Experiences during the pandemic have shown how online delivery can be used to maintain education delivery, and there has been a lot of investment put into technology. The ability to provide education online is something that we need to maintain as a tool that providers can use in the event of any future shocks to international education.

We will also explore how blended, online and offshore delivery can be used in the future as part of New Zealand's international education offering. ENZ will continue to pilot different models of delivery, and the lessons and evidence from these will be used to inform what we focus on and support in the future. Many students will still want an onshore international experience, but others will be interested in online delivery when the right products are targeted to the right markets.

Understanding and investing in areas of international education that bring value to New Zealand is a key part of sustainability. The sector needs to be able to seize new opportunities and respond to a future environment that may be quite different from the current one. That response must be backed up by research and evidence, and supported through policies, practices and regulations.

Stable and predictable education and immigration settings are important to providers and students. They give certainty and enable providers to deliver quality education and support students to make informed decisions about where and what they choose to study.

Most students return home at the conclusion of their studies. Those wanting to stay longer in New Zealand must have the skills and qualifications we need.

International education is high-value and high-quality, sought out for its distinctive New Zealand proposition

We want to ensure that international student enrolment continues to be based on quality education and a great student experience. Government and providers must work together to focus on high-quality, high-value programmes and services that attract and meet the needs of international students and enhance our distinctive New Zealand offering. We will build greater collaboration between education providers and other industries, support the development of niche products, and develop our brand to focus on our high-quality education experience.

We will aim to attract students who can provide benefits to New Zealand by helping to lift the educational performance of our institutions and, where relevant, meeting skill needs in our labour market. We will facilitate the entry of students who are coming to New Zealand for genuine study reasons, and make sure they understand their study and work options and obligations while they are here.

Regions throughout New Zealand increasingly share the benefits of international education ...

International education has a positive impact on New Zealand's regional economies and populations. However, it can be difficult to attract students to regions outside Auckland. We will work alongside regional economic development agencies and others to achieve a greater balance across regions. We will help regions to identify how they can attract international students and how international education can benefit those regions.

... and international education can help to meet our skill needs

International education can attract students who want to gain the qualifications and skills that the New Zealand labour market needs. We will continue to improve and strengthen policies, regulations and practices that help international education providers to attract these students. This will include working with international education agencies to ensure that education, immigration and labour market policies work positively for both international students and New Zealand.

We will also help industries to attract international students and keep graduates with the skills and qualifications that New Zealand needs. This could include providers working with employers to establish pathways from education to associated employment. We will explore how we can support both providers and industries to establish and deliver innovative, bespoke products that meet New Zealand's needs.

Other industries benefit from our having international students in New Zealand. International students are often accompanied by parents or caregivers and often attract their friends and relatives to visit New Zealand. The Government will explore ways to strengthen the connections between the international education sector and other industries such as tourism and information technology, so that we can identify and act upon opportunities across sectors and regions.

The international education sector flourishes through diversification of markets, people flows and innovative products and services

We are committed to working with the international education sector to identify and understand the opportunities and risks in both existing and new markets.

China and India will remain key focus markets, but we need to diversify our markets. This diversification means attracting a greater proportion of students from other countries, as well as developing a greater range of innovative products and services, including modes of delivery, offered by New Zealand providers and businesses. Government will support the sector to find more opportunities to develop its educational offerings (including through free trade agreements and the removal of non-tariff barriers) and attract skilled people from other countries to help grow New Zealand's economy.

Diversification may also include expanding New Zealand's education consultancy services and the products marketed to countries overseas, including technology and publishing, for use in their own education systems.

When we talk about 'diversification', we are referring to international education as a whole becoming more diversified. Many providers are already diversified and we do not expect smaller or niche providers to diversify to the extent that larger providers can, or into areas that are outside of their core purpose. Diversification will also happen within the bounds of the market and what the demand is from students and customers, so we will need to take a flexible approach while focusing on high-value offerings that can adapt as global situations change.

Goal 3: Developing global citizens

What does success look like?

- All students gain the knowledge and skills they need to live, work and learn globally
- International education provides stronger global connections, research links and partnerships
- New Zealanders understand and embrace the benefits of international education

Key actions:

Action	Agency	Timeframe
Work with Māori to understand their aspirations for international education, and what it would mean for it to be high-value and of benefit to Māori	MoE	Short-Medium term
Establish an understanding of what it means to honour Te Tiriti in international education.	MoE	Short-Medium term
Undertake policy work on how we can best support outbound mobility, particularly as sectors recover from COVID-19. This will include looking at how student scholarships and exchanges contribute to outbound mobility and if they could be better supported.	MoE	Medium-term
Help students to develop global competencies through delivery of the national curriculum.	MoE	Short-medium term
Enhance our connections with education systems and key stakeholders in the Pacific and create education opportunities for Pacific students both in the region and in New Zealand.	MFAT/MoE	Short-long term
Promote supports that enable schools to offer language learning, including the development of a National Language Strategy and the refresh of the New Zealand Curriculum in 2024	MoE	Medium-long term
Support Centres of Asia-Pacific Excellence to develop globally informed citizens, and work with them to monitor their effectiveness	TEC	Short-Medium term
Support providers in integrating international education and global citizenship into the learning environment.	MoE/ENZ	Long-term
Ensure that students who participate in ENZ-managed scholarship programmes develop global citizenship skills	ENZ	Ongoing
Proactively tell the story of international education in New Zealand and the benefits it delivers to New Zealand.	ENZ	Ongoing

Global citizens can study, work and live across cultural and national boundaries. They are open to new ideas, connected internationally, outward focused and interested in other people and their cultures, and they know that what is accepted in one culture may not be accepted in another. We need to be global citizens so that we can tackle global issues of the 21st century, such as sustainability, globalisation and climate change.

Global citizenship refers to a sense of belonging to a broader community and common humanity. It emphasises political, economic, social and cultural interdependency and interconnectedness between the local, the national and the global.

We want to produce global citizens who are well equipped for the world in which they will be living and working. Global citizenship must be based on knowing who we are, what we stand for and where we sit in the world. The New Zealand Curriculum already enables schools to address citizen education. Activities that support global citizenship can support and expand on that education.

It is also important to align global citizenship education with developments in the broader education work programme, such as the 30-year Education Plan, so that our future education system acknowledges and is able to meet the need for global citizenship education.

All students gain the knowledge and skills they need to live, work and learn globally

New Zealanders benefit from enhanced knowledge and understanding of other cultures and languages. People who are comfortable in diverse cultural contexts are needed in greater numbers, both within New Zealand's increasingly diverse population and overseas. They are able to interact

and form positive connections with international students, migrants and tourists to New Zealand.

Global skills and knowledge are developed in part through the mobility of students across our borders, whether they are international students coming to New Zealand or New Zealand students going overseas for part of their studies. Global skills and knowledge for New Zealand students may be explicitly taught through classroom studies or experienced through opportunities to study overseas under offshore scholarships.

The number of New Zealand students learning other languages is low compared to other learning areas. We want to encourage more New Zealanders to learn other languages alongside English and te reo Māori, for both the insights into other cultures and the cognitive skills they support.

International education provides stronger global connections, research links and partnerships

International contacts between students and researchers can encourage and enable the spread of knowledge and ideas from one country to another. Such connections lift the quality of research and help to improve the quality of education, leading to collaborative innovation. Relationships fostered through alumni networks and exchanges also help us to understand our key trading partners and develop opportunities for growth in many other sectors.

The Centres of Asia-Pacific Excellence (CAPEs), established in 2017, enhance economic, trade, political and cultural relationships with the Asia-Pacific region. For example, they utilise university networks and expertise to connect research to practice through workshops, resources and mobility programmes that increase New Zealanders' readiness to engage with the Asia-Pacific. We will work with the CAPEs, which have developed their own evaluation and monitoring system, to understand and improve their effectiveness and identify where their expertise can be used to support other global citizenship initiatives.

Using this Strategy as a basis for activity, the Government will encourage links between international education, research and business activities. We will keep growing New Zealand's research capabilities by helping international postgraduate research students to study in New Zealand – and we will look for ways to attract and retain academic talent that can help lift our institutions' capabilities.

Individual institutions in New Zealand already connect internationally through a range of partnerships with overseas institutions. The Government's recent Green Paper, Te Ara Paerangi Future Pathways sets out the importance of researchers and institutions working with international partners to co-ordinate and support science and innovation collaborations. We want to build on these partnerships and investments to encourage greater levels of collaboration and cooperation internationally. By building bilateral relationships using our educational diplomacy networks, we can support the sharing of best practice.

Part of global citizenship education is helping students to understand their place in the world. To contribute to this, we are committed to actively exploring how to enhance our connections with education systems in the Pacific, and what we can learn from these systems to create opportunities for Pacific students in New Zealand and the wider Pacific region.

New Zealanders understand and embrace the benefits of international education

Thriving and sustainable international education needs the support and buy-in of New Zealanders. Helping New Zealanders to understand international education as a high-value activity that brings social, cultural and economic benefits for all New Zealand will help to sustain growth and development. We will look for opportunities to promote the value of international education domestically.

Appendix 1: International education agencies group

Many government agencies have a stake in international education, including, but not limited to, New Zealand Trade and Enterprise, G2G Know How, Tourism New Zealand, and the Asia New Zealand Foundation. A broad range of agencies including Ministry of Health, New Zealand Police, Ministry of Social Development and the Human Rights Commission helps to set the environment in which international students live, learn and work. The following is a list of key government agencies that are members of the International Education Agencies group, and that have direct responsibility for the future of international education in New Zealand.

Education New Zealand Manapou ki te Ao (ENZ)

ENZ is the Government's agency for building international education marketing and business development agency. It promotes study with New Zealand and supports the delivery of education products and services offshore and/or online. ENZ also administers scholarships to support New Zealanders studying overseas, particularly in Asia and Latin America.

The Ministry of Education (MoE)

MoE is the Government's lead advisor on the education system, shaping direction for education agencies and providers, including international education. MoE also administers the Export Education Levy and provides policy advice on pastoral care of international students. MoE works with other NZ Inc agencies to develop and support international connections of significance to the whole education system. It reports on New Zealand's international obligations related to education, including the United Nations' Sustainable Development Goal 4. MoE also provides secretariat support to the New Zealand National Commission for UNESCO.

The Ministry of Business, Innovation and Employment (MBIE)

MBIE administers the immigration system and develops and administers student visa policies. MBIE also provides advice on the outcomes of the students who participate in the labour market and the interface between immigration and the labour market.

The New Zealand Qualifications Authority (NZQA)

NZQA is responsible for the New Zealand Qualifications Framework, the quality assurance of qualifications on the Framework and setting the rules for quality assurance in the tertiary education sector. NZQA administers the National Certificates of Educational Achievement (NCEAs) for secondary school students, and the Education (Pastoral Care of Tertiary and International Students) Code of Practice 2021. NZQA also works to increase the recognition of New Zealand qualifications overseas, including through formal recognition arrangements with other countries.

The Tertiary Education Commission (TEC)

TEC manages the public investment in tertiary education, is accountable for the delivery of the government's Tertiary Education Strategy, provides career services from education through to employment, and monitors the Crown's ownership risk in relation to tertiary education institutions.

Ministry of Foreign Affairs and Trade (MFAT)

MFAT addresses non-tariff barriers affecting the delivery of education services, negotiates market access for education providers delivering offshore, promotes and supports education exports through its network of posts, and promotes the New Zealand international education brand, including engaging with overseas governments to manage any diplomatic issues or risks that may arise.

The Education Review Office (ERO)

ERO evaluates and reports on the education and care of children and young people in early childhood services and schools.

Proactively Released

Appendix 2: Overview of actions

Focus Area One: Key actions to support the build and recovery

Action	Agency	Timeframe
Build preference for and promote New Zealand's international education brand through marketing and public relations activity to attract learners to study with New Zealand	ENZ	Short-term
Use global brand research to inform a sustainable recovery	ENZ	Short-term
Refresh the Prime Minister's Scholarships for Asia and Latin America to create a more responsive scholarship programme and enhance connections and partnerships	ENZ	Short-term
Review the Education New Zealand Recognised Agency Programme to support building and thriving international education, ensuring that it is supporting high-quality agents who will support the sector's recovery	ENZ	Short-term
Develop a framework for evaluating how well New Zealand is implementing the NZIES and monitoring progress towards its three goals.	MoE	Short-term
Leverage other diplomatic reconnecting and travel activity to promote international education.	MoE, ENZ	Short-term
Undertake regular reporting to education providers on processing time of student visas across key stages of the visa application process	INZ/MoE/ENZ	Short-term
Provide information to education providers on visa processing time for complex markets	INZ/MoE/ENZ	Short-term
Establish guidance and forums on requirements for what constitutes a good applications with education providers and agents	INZ/ENZ	Short-term

Focus Area Two: Building a new international education future

Goal 1: Delivering an excellent education and student experience

Action	Agency	Timeframe
Work with the New Zealand international education sector to identify and address its capability needs	ENZ	Short-medium term
Maintain the Education (Pastoral Care of Tertiary and International Learners) Code of Practice in line with the vision and aims of the International Education Strategy, including updated expectations for schools	MoE	Medium-long term
Explore options for the regulation of agents in order to improve and ensure quality of their service	MoE	Medium-long term
Ensure international students are aware of services and supports available to them, including how to access them. This will include undertaking a stocktake of supports available for international students and identifying any gaps.	ENZ	Short-term
Continue to rigorously monitor the quality of international education provision through programme monitoring, external evaluation and review and investigations, as necessary	NZQA	Ongoing
Continue research on the quality of the experience international students have when studying with New Zealand, and separately, how New Zealand's education is perceived internationally	ENZ	Ongoing
Deliver clear, timely and learner-focused information about studying with New Zealand education providers to learners, partners and agents	ENZ	Ongoing
Foster and maintain key connections and partnerships in targeted markets that contribute to a connected New Zealand	ENZ	Ongoing

Goal 2: Ensuring international education is resilient and sustainable

Action	Agency	Timeframe
Promote New Zealand's high-value offerings in new and existing markets	ENZ	Short-medium term
Use COVID-19 Response and Recovery Funding to support the diversification of international education products and services, including assisting successful applicants of the Product Innovation Fund to create new products and services pilots, providing thought leadership for the sector, and exploring diversifying modes of education delivery	ENZ	Short-term
Build a greater understanding of the opportunities for the diversification of education products and modes of delivery across both the existing sector and potential new entrants	ENZ	Medium-long term
Explore whether English language schools should be considered as a distinct sub-sector of tertiary education	MoE	Short-term
Work with Te Pūkenga and other providers to strengthen vocational education opportunities for international students	MoE	Medium term
Regularly share market information and insights with the sector to inform its marketing and recruitment efforts	ENZ	Ongoing
Develop and support alumni networks in order to maintain connections with markets and promote New Zealand to prospective students	ENZ	Medium – long term
Monitor the impact of the immigration rebalance policy changes made for student visas, in particular the changes made regarding post-study work rights	INZ/MBIE/MoE/ENZ	Long-term
As the goals of the International Education Strategy and the Immigration Rebalance are realised, review the medium-term visa products for international students (e.g. the pathway visa)	MBIE/INZ/ENZ	Long-term

Goal 3: Developing global citizens

Action	Agency	Timeframe
Work with Māori to understand their aspirations for international education, and what it would mean for it to be high-value and of benefit to Māori	MoE	Short-Medium term
Establish an understanding of what it means to honour Te Tiriti in international education.	MoE	Short-Medium term
Undertake policy work on how we can best support outbound mobility, particularly as sectors recover from COVID-19. This will include looking at how student scholarships and exchanges contribute to outbound mobility and if they could be better supported.	MoE	Medium-term
Help students to develop global competencies through delivery of the national curriculum.	MoE	Short-medium term
Enhance our connections with education systems and key stakeholders in the Pacific and create education opportunities for Pacific students both in the region and in New Zealand.	MFAT/MoE	Short-long term
Promote supports that enable schools to offer language learning, including the development of a National Language Strategy and the refresh of the New Zealand Curriculum in 2024	MoE	Medium-long term
Support Centres of Asia-Pacific Excellence to develop globally informed citizens, and work with them to monitor their effectiveness	TEC	Short-Medium term
Support providers in integrating international education and global citizenship into the learning environment.	MoE/ENZ	Long-term
Ensure that students who participate in ENZ-managed scholarship programmes develop global citizenship skills	ENZ	Ongoing
Proactively tell the story of international education in New Zealand and the benefits it delivers to New Zealand.	ENZ	Ongoing