

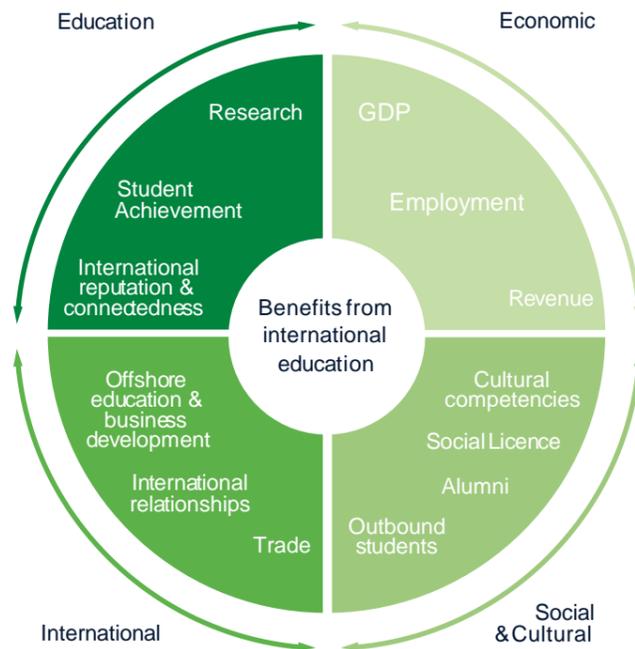
Strategic Recovery Plan for International Education

CONTEXT

- International education sector contribution to New Zealand's economy (2018)

National ranking of largest export sectors	5th
Broader economic value	\$4.9b
Enrolments	117,248 across 843 providers
Number of jobs supported by sector	45,000
Nationalities studying in New Zealand	190

- Unlocking the full value from international education



- Sector outlook for the next 12 to 24 months

- The recovery plan will build on and accelerate the 2018 New Zealand International Education Strategy, developed by the government and international education sector. Its goals are to deliver an excellent education and study experience, achieve sustainable growth and develop global citizens.
- The government is investing in international education to support a future focus on; diversifying products and services by developing offshore pathways (supported by quality assurance processes), providing a single New Zealand digital platform for New Zealand programmes and keeping New Zealand's brand alive.
- New Zealand has gained international recognition for our response to and management of COVID-19 and this is a key competitive advantage we can now harness.
- New Zealand's border restrictions are likely to remain for some time and quarantine requirements will remain in place for everyone who arrives in New Zealand.
- Maintaining New Zealand's presence and relationships in markets will be more challenging, and even more important, given border restrictions and less travel between countries.
- Regional economies will continue to be significantly impacted from the loss of international students and tourists.
- Led by Education New Zealand and the Ministry of Education, the Strategic Recovery Plan for International Education will see multiple Government agencies working closely together alongside the international education sector.

FUTURE STATE

- What does future state look like?

A transformed international education sector will be more diversified, resilient, and sustainable. As a sector, it will be a:

- Global international education leader, an engager and a connector helping build prosperity, safety and wellbeing.
- Key driver of economic wellbeing through providing trade links, student revenue, wider revenue and a future-proofed sector.
- Booster for regional development by matching the right students to the right places in New Zealand.

For students and education providers:



- Not all learners will be based in New Zealand because delivery to international students will be a mix of onshore, offshore, online and blended formats. Ongoing institution-level connections for science and technology development enhanced.
- New Zealand providers rankings and relevance enhanced through strategic partnerships and support from agencies.
- New Zealand education system improves on the back of international connectivity.
- We will increase the cultural competency of New Zealanders to create global citizens.

For regions and businesses:



- International students support greater economic and regional development, leading to improved outcomes for themselves and New Zealand.
- Business and investment outcomes made through New Zealand international education alumni.

For Government:



- Government agencies are focused on a core group of priority markets.
- International education supports the New Zealand government to engage with foreign governments on educational topics to improve bilateral relationships.
- New Zealand Government agencies facilitate education diplomacy through strategic use of research and academic exchange, in and out-bound scholarships and extensive people-to-people links.

- Building a broader sector – with more benefits

- The sector will need to take the opportunity to not only recover but also to transform.
- The speed with which New Zealand recovers, will be commensurate with the value proposition developed, the investment into key markets and the policy decisions taken around aligning international education with value over volume.
- This work needs to be responsive to and align with the broader all-of-government and education COVID-19 work programmes.



Diversify delivery of international education products to match global market opportunities and learner expectations.



Create lifelong **international advocates** for New Zealand, our people, our products and our services.



Create **enduring relationships** between New Zealand and other countries for mutual benefit.



Boost regional development and New Zealanders' understanding of the value of international education



Economic wellbeing through trade links, student revenue, wider revenue and a future-proofed sector.

Recovery plan framework

The strategic recovery plan is a long-term plan to support the rebuild, recovery and reset of the international education sector. It consists of three concurrent workstreams: the immediate response is to create sector stability; the second strengthens the international education system; and the third focuses on transforming New Zealand's international education approach for a more innovative, robust and sustainable future.

Transition and economic stimulus

Early return of students



The return of students when it is safe to do so is a critical part of the sector's recovery. We will continue efforts to bring in small cohorts of international students, building in 2021.

Immediate assistance package



Fund PTEs key to sector recovery, targeted to providers of strategic importance to preserve the foundations of the sector (\$10 million available mid-August).

Support for state and state-integrated schools



Support for the remainder of 2020 to continue to employ specialist international workforce to continue teaching and providing pastoral care for students still in New Zealand (\$20 million available end-August).

Funding for English language schools



Support for English language schools to deliver English language training to migrants (\$1.5 million available from mid-August).

Export Education Levy



Building on previous EEL announcement, intention to cancel payment obligations for the Levy payments until the end of 2021 and maintaining services funded by the Levy (\$6.6 million).

Strengthening the system

Steering the system



Enhancing policy and regulatory settings to guide the recovery and shape the future. Establish a cross-government group to review and agree on settings for:

- High value international markets priority cohorts, how key education settings work alongside work rights as part of the education offer, accountability of providers (e.g. education agents), ensuring students have adequate funds to support themselves, pastoral care and quality offshore delivery.

Strengthening the foundations



Adjusting and embedding the revised settings within the regulatory system to improve education quality, student experience and to support recovery and achieve best outcomes for New Zealand by:

- Adjusting and operationalising regulatory settings to better support and enable quality onshore and offshore delivery.
- \$500k to ensure the quality of a NZ education delivered offshore.

Strengthening the education offer globally



Deliver a strengthened offer to international students by:

- Enhancing protection and wellbeing to students
- Ensuring New Zealand is targeting the students who will best thrive in New Zealand and contribute economically.
- Ensuring education agents work for students' wellbeing and interests and align with New Zealand's interests.
- Ensuring New Zealand is partnering with the right strategic partners and institutions onshore and offshore.

Reducing crown risk and increase sector resilience



Determine the risk appetite of the Crown while improving the resilience of the sector to future shocks i.e. through product diversification and markets.

- Determine how we can invest over the next 1-5 years to shift the market to more offshore delivery and new products.
- Confirm the risk appetite of the crown and what financial sustainability and resilience will mean for the sector in the future. Includes choices about the levy and insurance arrangements.

Re-focus our international presence



Better alignment to ensure maximum strategic value and impact from our offshore presence to deliver greater trade benefits, enhanced diplomatic relationships and greater value.

- Review and enhance offshore footprint to align with agency work programmes, delivering greater value to New Zealand.

Optimise research relationships



Identify how better connecting across our system can maximise and broaden value from academic partnerships for New Zealand.

- Strengthening institution to institution relationships to enhance benefits from New Zealand's science, research, and innovation partnerships.

Transforming to a more sustainable future state

Diversifying products and services to extend reach



- A flexible package of seed funding to test, develop and deliver new products and services to increase resilience
- A New Zealand branded one-stop shop digital platform, where we can connect learners across their lifetimes with different types of digital education content from all parts of New Zealand's education sector. For example micro-credentials to full digital credentials, virtual summits and tutoring.
- An offshore pathway initiative that will enable learners to begin their New Zealand journey from their home country and then transfer directly into qualifications offered in New Zealand. This work will start with New Zealand universities and has future potential to involve other providers.
- (\$10 million over 3 years)

Marketing and Brand Protection



- Keep New Zealand's brand alive in the hearts and minds of people purchasing international education as well as utilising New Zealand's world leading COVID-19 safety reputation.
- Targeted promotion campaigns, market channel development and student retention campaigns.
- Coordinated marketing efforts supporting the recovery and development of the sector and regions.
- (\$3 million over 2 years)

ENZ activities aligned to recovery plan



- Education New Zealand will be re-shaping its business plan activity and resources to support and drive the recovery plan.
- Activity will include brand positioning, maintaining engagement with students, partners and agents offshore, student retention and transitions, building the international reputation of New Zealand education, and working with the sector and regions on innovation and new modes of delivery.

Next steps

- Transition and Economic Stimulus continues to be rolled-out – Mid-August
- Targeted sector engagement – August 2020
- Strengthening the System policy underway – August 2020
- Transforming to a More Sustainable Future State underway – August 2020
- Cross-agency work on developing a suitable model for re-entry of international students – Continues
- Marketing and brand protection activity – commencing August 2020 and ongoing
- Report back to Cabinet on Recovery Plan implementation – December 2020
- Advice to Minister/s on Strengthening the System – March-December 2021
- Offshore pathways – soft launch late 2020
- Digital platform in place – prototype ready October-December 2021
- EEL Review – April-December 2021

Further Information

For further information, visit Education New Zealand <https://enz.govt.nz/news-and-research/recovery-plan-for-international-education-sector/>