

## Universities New Zealand Submission on the New Zealand International Education Strategy

Thank you for the opportunity to provide feedback on the refreshed New Zealand International Education Strategy.

This submission goes through each of the strategy goals and outlines provider and student perspectives alongside identification of areas where government could develop enablers and provide support.

Appendix 1 provides a summary framework.

At a high-level there is broad agreement with the direction of the strategy. There are elements that align with our sector goals that we can move forward with.

### What's missing from the strategy

- An understanding of the competitive nature of the global international education industry
- The role of providers in IE, what providers' goals and aspirations are
  - o What is it that providers are willing and able to invest in?
- An understanding of the student decision making process when selecting an IE destination and student demand (have students been engaged in the consultation process?)
- Graduate outcomes and employability (have businesses, community groups and regional EDAs been consulted?)
- An action related to social licence
- An action on fostering quality partnerships for research collaboration

Recognising that this is a government strategy, it is recommended that a multi-agency group be established with university representatives to develop a joint implementation work programme that drives sector outcomes. It would be helpful if this was captured as an action in the strategy.

### Phase one: Build and recovery

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#### Actions:

- *Build preference and promote NZ's IE brand through marketing and public relations activity (ENZ)*
- *Use broader impact research of NZIE to inform recovery and sustainability*
- *Refresh PMSA and PMSLA*
- *Review ENZRA to support high-quality agents*
- *Leverage other diplomatic reconnecting and travel activity to promote international education*

#### Immediate economic value statement

- Long-term students (staying for multiple years) and ākonga/students who will likely pathway from one education provider to another
- Students are more evenly spread across the regions
- Students who could contribute to skills needs during study

#### Alignment

Strong agreement and alignment with this goal. However, there needs to be actions aligned to rebuilding our reputation. While NZ was viewed favourably initially for our response to the pandemic, viewpoints changed the longer we kept our borders closed. This coupled with new INZ policy means New Zealand may not be seen as welcoming and friendly.

Long-term and pathway students are a good area to focus on growing.

### **Student perspectives**

Returning students:

Over three in four offshore students said they planned to study in New Zealand in 2022.

Returning students want to resume or begin their on-campus study as soon as possible. However, those who were not planning to continue their studies in New Zealand in 2022 said that other countries' open borders were the main reason (21%). Dissatisfaction with the quality of New Zealand online teaching (20%) was also a significant factor, along with lack of work opportunities following study (17%).

Non-recognition of offshore study contributing to post-study work rights and the lack of recognition of the continued commitment these students made to NZ over the Covid period could result in students feeling as though they are not being valued. Also, those students nearing the end of their degree will be less inclined to come to NZ.

There are concerns about visa processing times and travel restrictions in home country.

New students:

Immigration policy changes will greatly affect demand for NZ as a study destination. The ability to work after study is one of the main factors influencing students' decision on an international education destination. Furthermore, the ability to work after study is directly linked to whether a student views a country to be welcoming and friendly.

Prolonged border closures have also affected the perception of NZ being welcoming and friendly.

The pandemic caused many students to enter the workforce early as opposed to choosing international study, or they commenced their study in their home market.

Around 34% of the 110,000 students surveyed by QS changed their destination country based on how they handled the pandemic and whether borders were open.

### **Government enablers to support this goal:**

In the short-term practical and operational support is necessary:

- Reputational support
- Increased investment in scholarships for international students
- Consider another set of PM scholarships for different regions
- A national engagement strategy that goes above and beyond ENZRA, it is about partnership, not compliance
- Familiarisation support for university selected agents from key markets
- G2G – support in key markets

## **Goal 1: Delivering an excellent education and student experience**

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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

*Actions:*

1. *Identify and address sector capability needs (ENZ)*
2. *Maintain the code*
3. *Foster and maintain key partnerships in targeted markets (ENZ)*
4. *Deliver clear, timely and learner focused information about studying with NZ education providers to learners and agents*
5. *Continue research on market perceptions of quality of how NZ education is perceived*
6. *Support initiatives to enhance student wellbeing*

**Alignment**

There is strong alignment across students, providers and government for this goal.

**Student perspectives**

Based on the NZ international student experience survey 2021, 89% of university students were satisfied with their overall experience in NZ and 85% would recommend NZ as a study destination.

Living experience, education experience and value for money are the top 3 experience drivers for university students.

When it comes to wellbeing, 62% of students in the ISS (global) survey thought it was either extremely or very important that universities provided mental health counselling (compared with only 60% in 2021). Additionally, 64% thought it important they provide services for support with students' mental wellbeing (compared with only 60% in 2021). The fact that nearly two-thirds of candidates recognise the importance of these services for students should reiterate the priority that universities allocate towards this particular issue. This issue has an enhanced level of scrutiny following the pandemic.

Having work experience opportunities and having experiences that may lead to full-time work in New Zealand were important experience drivers. Only four in ten students rated these positively (40% and 46% respectively).

Students are looking for value and a return on their significant investment in an international education through employment outcomes. Employability and a degree leading to their chosen career path continues to be increasingly important for students. 81% of international students see buying an international education as an investment to improve career opportunities or pursue a specific career.

**Provider perspectives**

Universities are doing well in terms of providing an excellent education and student experience.

Immigration New Zealand have a key role to play and INZ policy could contribute to a negative student experience.

Students who do a 4 year BE(Hons) are eligible for 3 years PSWR but students who do 3 year BCom + 1 year BCom (Hons) are only eligible for one year, despite spending the same amount of time and finishing with the same level qualification, just because it is structured differently. Similarly, how can

someone who does a 3 year BCom get longer than someone who does 3+1 ending with BCom (Hons). This feels like an unintended consequence that we would want to have rectified.

Likewise, INZ policy disadvantages students that begin their study in their home country with a pathway provider. For example, Student A does a 3 year BCom at university and gets 3 years PSWR while student B also does a 3 year BCom at university with the first year spent with an affiliated provider based on campus (doing equivalent courses accredited and moderated by the university) and only gets 2 years PSWR. This can negatively affect the student experience and make it more difficult for providers to diversify with these delivery modes. Some students would be best suited starting at a pathway provider from a pastoral care and student success perspective, but if they care about PSWR they would be best advised to enrol directly at university even though this may not be best for them. Likewise, students who start one qualification but realise after a year it is not for them – these students often transfer to another qualification taking some credit with them but are discouraged from doing so under this policy. The sector would welcome working with MoE and MBIE on this to see if we are able to have more cohesive policy support.

The pandemic has led to increasing level of anxiety and mental health matters within the community. This is alongside health sector changes and outcomes from the DHB reviews which will impact the service delivery model for student wellbeing.

#### **Relevant key areas to maximise value – high-value statements**

- Education offerings that align with key priority areas or where NZ is world-leading or where we offer a unique product
- Education offerings that contribute to addressing government's wider goals and objectives like meeting global environmental objectives
- Education offerings that contribute to a strong NZ international reputation

#### **What's missing**

A specific action around social licence: we need community support for international education to ensure our students feel welcome and safe

Graduate outcomes and employability are key drivers for students choosing to study internationally and there is intense global competition to attract and retain this global talent. The strategy document outlines the following key areas to maximise long-term economic value:

- Students that contribute to our academic relationships which will feed into research and innovation (PhD)
- Students who strengthen NZ's long-term human capital and labour productivity areas of need
- Students that may help NZ develop unique products and services

Yet actions around graduate outcomes, employability and preparing students for the future are missing from the strategy. If we are wanting to target students that meet areas of current and future NZ skills needs, then we should develop policy incentives for international students studying in those areas. We also want to ensure that international students are equipped with the skills they need to be successful in their home country or a third market.

Providing adequate support towards graduate employability will require building deeper connections between education providers, local government, EDAs and industry, including through strengthening research collaborations.

### **Government enablers to support this goal:**

- Build on the international education student wellbeing strategy with the future modes of study and student diversity in mind
  - o Ensure we effectively support and encourage the international student voice in the development of wellbeing initiatives
- Part of the EEL previously funded wellbeing initiatives a similar funding model would be beneficial
- A central wellbeing fund to support enrolled international students
- Support for initiatives to help with graduate outcomes and employability
- Social licence:
  - o Engagement with employers on the benefits of hiring international students
  - o Engagement with communities on the benefits of IE (to help students feel welcome and safe)

## **Goal 2: Ensuring international education is sustainable and resilient**

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What does success look like?

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

*Actions:*

- *Ensure the EEL is sustainable and remains fit for purpose*
- *Develop new and extend existing education programmes, products and modes of delivery that reflect NZ's unique offerings (ENZ)*

### **Alignment**

There is the potential for misalignment between government, providers and students in terms of market diversification, diversification of products, programmes and delivery models.

It is not government that invests time and resources into programme development and delivery, providers do, and it is students making the significant investment in their international education.

Government and providers need to work on this to be informed by what students actually want, not what we can hopefully persuade them to want. Government could spend a lot of time and money pushing an agenda that gets no support.

We need consistency across the government agencies on what diversification means in this sense, we have received conflicting messaging from government agencies. Diversification can mean many things and the universities are currently doing it.

### **Market diversification**

The global international education industry is intensely competitive, market diversification will require a joined up NZ inc approach.

The strategy states that valuable markets are those which:

- Support outbound mobility for domestic students, including reciprocal arrangements between providers
- Provide international relations value – priority countries that support New Zealand’s diplomacy, development objectives and trade opportunities/commitments overseas
- Tertiary offerings offshore where students start their NZ study experience offshore, including TNE

### Student perspectives

#### Decision making factors

- High quality education and teaching
- Right to work in NZ once studies are complete
- Opportunity to live in a society that is welcoming and inclusive
- NZ’s reputation as a safe country

The NZ ISS stated that the key factors in students’ decision to study in New Zealand were the right to work in New Zealand along with the opportunity to live in an inclusive, welcoming society that is safe.

(% very + extremely important):

- Right to work in New Zealand once my studies are complete 78%
- Opportunity to live in a society that is welcoming and inclusive 75%
- New Zealand's reputation as a safe country 73%

International university graduates are valuable highly skilled migrants sought by the world’s knowledge economies. There is intense global competition to retain this talent. This is evidenced by our competitor countries (US, UK, Canada, Australia) developing policies to increase this retention.

For all students globally, employability outcomes are a key driver for students and their families. Even more so for families choosing to make the significant investment to study in another country. The opportunity to apply what they have learned in their country of study is an expected component of today’s international education market. The right to work was ranked as one of the top five factors in students’ decisions to study in New Zealand in 2019.<sup>1</sup> The interest far exceeds uptake, but students find the *option* important when deciding between New Zealand and other study destinations. We know 45% of international university graduates leave New Zealand immediately to further develop their career in their home country or another market. Within five years, 71% of original graduates have left the country.<sup>2</sup>

The international students that do stay in New Zealand after graduation have strong English language ability, understand New Zealand and New Zealanders, and possess the cultural and language skills that can assist New Zealand businesses to operate in the global marketplace. Of the cohort of international students that graduated from a New Zealand university during 2010–2014, 39.2% transitioned to a post-study work visa. Five years post-graduation, 20.9% of international graduates had transitioned to a skilled work visa.<sup>3</sup> Over 90% of those that stay long term are in high-

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<sup>1</sup> Education New Zealand, International Student Experience Survey, 2021

<sup>2</sup> Notes: Percentages are calculated on rounded counts. Source: Universities New Zealand, extracted from Integrated Data Infrastructure. Population is restricted to university graduates.

<sup>3</sup> Ibid.

skill roles. Unfortunately, they do take longer to achieve salary outcomes compared with their domestic peers, but regardless they are successful in the labour market and contribute to New Zealand's skills gaps.

#### Provider perspectives

China and India will remain important source markets while we work to diversify.

There needs to be strong alignment and collaboration across government agencies to determine diversification markets in partnership with providers. There will need to be cohesive policy support and significant investment to develop priority diversification markets.

We recognise that each government agency will have differing market priorities but providers need to be aware of what these priorities are so they can align investment and resources to those goals. We welcome the opportunity to work with government to identify diversification markets.

#### **Diversification of products, programmes and delivery modes**

##### Offshore and online – student perspectives

The QS international student survey did an analysis of how interest in online learning has evolved throughout the pandemic and went on to highlight the perceived benefits and enduring barriers that limit its adoption. This provides guidance for the long-term role for online learning in higher education and how universities can optimise alternative learning structures.

Key findings:

- 78% of candidates expected the majority of their teaching to be conducted in a face-to-face environment when they begin their studies
- 67% of candidates believe that interaction with other students become more difficult in a virtual setting
- 47% of candidates would be interested in a hybrid learning experience, combining virtual and in-person study

A purely online model is not viable from a student perspective.

When asked how interested they would be in studying for their degree via a variety of online platforms, only 20% of prospective candidates were either 'extremely' or 'very' interested in online or distance learning in 2022. This is broadly consistent with the 20% who were interested in 2021, which suggests that the pandemic has done little to enhance the long-term potential for a purely virtual learning model.

This notion is reiterated by the fact that the proportion who are not at all interested in online learning has increased from 29% in 2021 to 33% in 2022.

While students do like the flexibility of blended learning models, and the ability to work while studying, 78% of students expected to return to face-to-face teaching and only 10% thought online would be a feature when they enrolled.

##### Benefits of blended learning models

There is considerably greater interest in a blended learning model that combines distance and on-campus learning. 31% of candidates claimed to be either extremely or very interested in this form of study. This demonstrates that a significant proportion of prospective students would be happy to

study at least part of their degree online and that they recognise the role for online learning in specific parts of their degree. Many candidates recognise online learning as a viable alternative, lending it sufficient market potential to warrant further attention from universities. Universities need to take note of this and consider how they can adapt their teaching structures to incorporate online learning in specific ways for students. While in-person teaching is by far the most popular avenue (and is likely to continue to be popular) in the medium term, there is a growing cohort of candidates who are actively seeking out a blended learning approach.

When looking at why this audience would consider an online degree, the most widely perceived benefits are the convenience of studying from any location and the flexibility it offers to students, with 77% and 74% selecting these options respectively. 55% of candidates recognise the benefits of being able to study while working when taking an online degree.

Another key benefit that has become increasingly recognised post-pandemic is that they don't need to relocate to get the benefits of an overseas degree, with 47% of candidates selecting this option. There are no limits on the hours they can work in their home country.

#### Barriers of blended learning models

By contrast, we can also look at the perceived barriers to studying for an online degree. When asked about this, access to the facilities of a university remains the most prominent barrier, with 79% of candidates selecting this option.

It is also worth noting that the lack of contact with fellow students in an online degree setting is seen as a prominent barrier by many candidates. It is important for students to have the opportunity to debate the subject matter in a 'live' setting, as these experiences are perceived to be a key part of any university experience. Addressing this and providing a space for students to interact virtually could be a useful way of minimising some of the barriers associated with online learning. The structure of scheduled classes is a barrier that has become notably more prominent in 2022, with 53% of candidates selecting this option, up from 50% in 2021. This is a likely effect of the pandemic, with many students taking classes online, or viewing recordings of lectures, rather than viewing them live. This removed many of the day-to-day structures of the traditional degree experience and the data here would suggest this impact was felt by many students at the time.

#### Overall

When asked how they expect to be taught when they begin their studies, over 78% of candidates expect their degrees to be taught predominantly in a face-to-face setting. Fewer than 10% expect online teaching to feature heavily in their studies, which suggests that expectations are for a significant return to normality by the time the next enrolment begins. This reiterates the notion that attitudes towards online learning are not shifting as dramatically as had been expected, especially when combined with the trends identified previously with regards to interest in online and blended learning capabilities.

Interactions with other students and with teaching staff are seen to be significantly more limited in an online setting, which reiterates the notion that they see these interactions as a fundamental part of their university experience and of their studies. 67% of all prospective candidates believe that interactions with other students are more difficult in an online setting. This reiterates the statistics seen earlier, which suggests that one of the more prominent barriers to online learning is that candidates do not have the option to meet with other students easily. It is important that universities are able to facilitate easy interactions between students and that they incorporate this



element into their course structures in the future. The last two years have proven that virtual interactions are no substitute for face-to-face ones and this should be reflected in the student experience.

The final element to consider here relates to the appeal of a hybrid learning approach. When asked about this, nearly half of all candidates found the notion to be either very or somewhat appealing. By contrast, nearly a third of all candidates find the idea unappealing instead. This reiterates the findings seen earlier, which suggest that a purely online learning model is not regarded as a viable alternative by the vast majority of students, however a model that might combine online and in-person learning experiences would garner significantly greater appeal.

#### Provider perspectives

Providers are already growing and diversifying education delivery models. The universities are already diversifying in this area. Examples of this are:

- NZ study centres
- Individual institution study centres/hubs, in-market with partner institutions
- Hybrid learning models of online and in person at study centres
- Pathway and articulation arrangements
- Virtual WIL – in-market WIL
- Virtual study abroad experiences
- Fully online programmes
- Joint degree programmes

These delivery modes will become more prevalent, as universities intend to maximise their long-term potential to recover sustainably. Alongside these, diversification also includes targeting different student cohorts in existing markets – e.g., full degree students in the US, expanding existing products into new markets as well as establishing new markets.

Considerations for further development include:

- Student demand
- Non-recognition of online learning in key markets (China, India)
- Perceptions of the quality of online learning/degrees
- Non-recognition of time spent studying offshore as contributing to post-study work rights
- Non-recognition of in-market and online WIL opportunities

#### **Government enablers to support this goal:**

- Promote the products and services we currently have
- A common position across government agencies on what diversification means that providers are able to refer to and align with
- Consistent policy to support diversification
- Address non-tariff barriers that limit the recognition of NZ qualifications delivered online
- Encourage countries to ratify the Tokyo convention and global conventions on the recognition of qualifications
- Achieve better recognition of the value of hybrid and digital programmes and delivery
- All-of-government alignment and approach to market diversification
- Priority visa processing for students from new diversification markets
- Market-specific strategies for diversification

- Three-year PSWR for bachelor's graduates who begin their study offshore, including year one – provided they are in pathways in an identified diversification market
- New visa for high potential individuals from diversification markets studying in areas of NZ current and future skills needs
- Investment in scholarships for diversification markets

### **Goal 3: Developing Global Citizens**

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What does success look like?

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

*Actions:*

- *Undertake policy work on how we can best support outbound mobility*
- *Looking at how student scholarships and exchanges contribute to outbound mobility and if they could be better supported (MoE)*
- *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 NZ*
- *Promote supports that enable schools to offer language learning, including the development of a national language strategy and the refresh of the NZ curriculum 2024.*
- *Support CAPEs to develop globally informed citizens and monitor their effectiveness (TEC)*
- *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*
- *Establish an understanding of what it means to honour Te Tiriti in international education.*

### **Alignment**

A high degree of alignment and support for global citizenship.

### **Provider perspective**

In the 2018 strategy a key action for MoE in the short term was to develop an outbound mobility strategy that included a review of student scholarships and exchanges. In the current strategy this is set as a medium-term goal. It is recommended that this is recategorised as a short-term action. There is an opportunity to build on the outbound mobility strategy work begun in 2019 between UNZ and MoE.

### **Government enablers to support this goal:**

- Short-term development of outbound mobility strategy
- A specific action around social licence

### Appendix 1: NZIES alignment framework

Goal	Government actions	Potential alignment or misalignment	Provider perspectives and actions	Student perspectives	Request to government for enablers/support
<p><b>Phase one: Build and recovery: help providers rebuild their base for onshore student delivery</b></p> <p>Long-term students (staying for multiple years) and akonga/students who will likely pathway from one education provider to another</p> <p>Students that contribute to skills needs during study</p>	<ul style="list-style-type: none"> <li>- Build preference and promote NZ's IE brand through marketing and public relations activity (ENZ)</li> <li>- Use broader impact research of NZIE to inform recovery and sustainability</li> <li>- Refresh PMSA and PMSLA</li> <li>- Review ENZRA to support high-quality agents</li> <li>- Leverage other diplomatic reconnecting and travel activity to promote international education</li> </ul>	<p>High degree of alignment for rebuilding onshore student base.</p> <p>Agree with targeting pathway students</p>	<p>In-market re-engagement with key partners</p> <ul style="list-style-type: none"> <li>- Institutions</li> <li>- Agents</li> <li>- Delivery partners</li> </ul> <p>Attending international education fairs</p>	<p><u>Returning students</u></p> <p>Returning students want to resume or begin their on-campus study as soon as possible. However, those who were not planning to continue their studies in New Zealand in 2022 said that other countries' open borders were the main reason (21%). Dissatisfaction with the quality of New Zealand online teaching (20%) was also a significant factor, along with lack of work opportunities following study (17%)</p> <p>Students may feel as though they are not valued. Non-recognition of offshore study and the continued commitment these students made to NZ will not contribute to their PSWR. Also those students nearing the end of their degree will be less inclined to come to NZ</p> <p>There are concerns about visa processing times and travel restrictions in home country</p> <p><u>New students</u></p> <p>Immigration policy changes will greatly affect demand for NZ as a study destination</p> <p>Prolonged border closures have affected the perception of NZ being welcoming and friendly</p> <p>The pandemic caused many students to enter the workforce early as opposed to choosing international study, or they commenced their study in their home market</p>	<p>In the short term, looking at practical and operational support to rebuild onshore student delivery:</p> <ul style="list-style-type: none"> <li>- Work on rebuilding New Zealand's reputation in key markets</li> <li>- G2G relationship building in key markets</li> <li>- Increased investment in scholarships for international students</li> <li>- Consider another set of PM scholarships for different regions</li> <li>- A national engagement strategy that goes above and beyond ENZRA, it is about partnership, not compliance</li> <li>- Familiarisation support for university-selected agents from key markets</li> </ul>

### Appendix 1: NZIES alignment framework

Goal	Government actions	Potential alignment or misalignment	Provider perspectives and actions	Student perspectives	Request to government for enablers/support
<p><b>Goal 1: Delivering an excellent education and student experience</b></p> <p><b>Success is:</b></p> <ul style="list-style-type: none"> <li>- International students receive a high-quality education</li> <li>- International students are welcome and safe</li> <li>- New Zealand delivers an excellent overall student experience</li> </ul>	<ul style="list-style-type: none"> <li>- Work with the sector to identify and address capability needs (ENZ)</li> <li>- Maintain the code (MoE)</li> <li>- Foster and maintain key connections and partnerships in targeted markets (ENZ)</li> <li>- Deliver clear, timely and focused information about studying with NZ education providers to learners and agents (ENZ)</li> <li>- Continue research on market perceptions of quality and how New Zealand’s education is perceived internationally (ENZ)</li> <li>- Support initiatives to enhance student wellbeing (MoE)</li> </ul>	<p>High degree of alignment, although nervousness around well-meaning compliance costs with the code</p> <p>The student experience includes the graduate experience and work experience. Graduate employability appears to be missing from the strategy, yet students that contribute to NZ skills gaps, research and innovation and may help to provide unique products and services are seen as being of high value in terms of long-term economic value</p>	<p>Providers are doing well in this space.</p> <p>The NZ international student survey has identified areas where there could be more improvement.</p> <ul style="list-style-type: none"> <li>- People connections</li> <li>- Work opportunities</li> <li>- Mental health and wellbeing</li> </ul>	<p><u>Excellent education</u> Across all sectors 85% of international students in NZ rated their education experience as excellent or very good. This is the most important driver in the tertiary sector.</p> <p><u>Student wellbeing</u> 62% of students in the ISS (global) survey thought it was either extremely or very important that universities provided mental health counselling (compared with only 60% in 2021). Additionally, 64% thought it important they provide services for support with students’ mental wellbeing (compared with only 60% in 2021). The fact that nearly two-thirds of candidates recognise the importance of these services for students should reiterate the priority that universities allocate towards this particular issue. The pandemic has placed an enhanced level of scrutiny on the issue</p>	<p>Build on the international education student wellbeing strategy with the future modes of study and student diversity in mind</p> <p>Part of the EEL previously funded wellbeing initiatives and a similar funding model would be beneficial</p> <p>A central wellbeing fund to support enrolled international students</p> <p>Support for initiatives to help with graduate outcomes and employability</p> <p>Social licence:</p> <ul style="list-style-type: none"> <li>- Engagement with employers on the benefits of hiring international students</li> <li>- Engagement with communities on the benefits of IE (to help students feel welcome and safe)</li> </ul>

### Appendix 1: NZIES alignment framework

Goal	Government actions	Potential alignment or misalignment	Provider perspectives and actions	Student perspectives	Request to government for enablers/support
<b>Goal 2: Ensuring international education is sustainable and resilient</b>	Develop new and extend existing education programmes, products and modes of delivery that reflect NZ's unique offerings (ENZ)	<p>Generally, there is alignment between provider and government goals for expanding programmes and delivery modes. However, there is varying degrees of interest and investment in online and offshore provision across providers</p> <p>There is the potential for misalignment. It is not government that invests time and money – providers and students do. They will vote with their feet. Governmentt can spend a lot of time and money pushing an agenda that gets no support</p> <p>Contradictory INZ policy</p>	<p>Providers are already diversifying programmes and delivery modes:</p> <ul style="list-style-type: none"> <li>- NZ study centres</li> <li>- Individual institution study centres/hubs in market with partner institutions</li> <li>- Hybrid learning models of online and in-person study centres</li> <li>- Pathway and articulation arrangements</li> <li>- Virtual WIL – in-market WIL</li> <li>- Virtual study abroad experiences</li> <li>- Fully online programmes</li> <li>- Joint degree programmes</li> </ul>	<ul style="list-style-type: none"> <li>- 78% of candidates expected the majority of their teaching to be conducted in a face-to-face environment when they begin their studies</li> <li>- 67% of candidates believe that interaction with other students become more difficult in a virtual setting</li> <li>- 47% of candidates would be interested in a hybrid learning experience, combining virtual and in-person study</li> <li>- A purely online model is not viable from a student perspective</li> </ul> <p>Fewer than 10% expect online teaching to feature heavily in their studies, which suggests that expectations are for a significant return to normality by the time the next enrolment begins</p>	<p>A common position across government agencies on what diversification means that providers are able to refer to and align with</p> <p>Consistent policy to support diversification</p> <p>Address non-tariff barriers that limit the recognition of NZ qualifications delivered online.</p> <p>Encourage countries to ratify the Tokyo convention and global conventions on the recognition of qualifications</p> <p>Achieve better recognition of the value of hybrid and digital programmes and delivery</p>
	Market diversification	<p>Agreement for the need to diversify but China and India will remain valued partners. Policy also limits what we can achieve in terms of market diversification on multiple fronts (PSWR and 'high risk' countries)</p>	<p>Market diversification will require significant investment and support from NZ Inc</p>	<p>For all students globally, employability outcomes are a key driver for students and their families. Even more so for families choosing to make the significant investment to study in another country. The opportunity to apply what they have learned in their country of study is an expected component of today's international education market. The right to work was ranked as one of the top five factors in students' decisions to study in New Zealand in 2019.<sup>4</sup> The interest far exceeds uptake, but students find the <i>option</i> important when deciding between New Zealand and other study destinations</p>	<ul style="list-style-type: none"> <li>- All-of-government alignment and approach to market diversification</li> <li>- Priority visa processing for students from new diversification markets</li> <li>- Market-specific strategies for diversification</li> <li>- Three-year PSWR for bachelor's graduates who begin their study offshore, including year one – provided they are in pathways in an identified diversification market</li> <li>- New visa for high potential individuals from diversification markets studying in areas of NZ current and future skills needs</li> <li>- Investment in scholarships for diversification markets</li> </ul>

<sup>4</sup> Education New Zealand, International Student Experience Survey, 2021

**Appendix 1: NZIES alignment framework**

Goal	Government actions	Potential alignment or misalignment	Provider perspectives and actions	Student perspectives	Request to government for enablers/support
<p><b>Goal 3: Developing global citizens</b></p>	<ul style="list-style-type: none"> <li>- Undertake policy work on how we can best support outbound mobility</li> <li>- Looking at how student scholarships and exchanges contribute to outbound mobility and if they could be better supported (MoE)</li> <li>- 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 NZ</li> <li>- Promote supports that enable schools to offer language learning, including the development of a national language strategy and the refresh of the NZ curriculum 2024</li> <li>- Support CAPEs to develop globally informed citizens and monitor their effectiveness (TEC)</li> <li>- 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</li> <li>- Establish an understanding of what it means to honour Te Tiriti in international education</li> </ul>	<p>High alignment</p>	<p>In the 2018 strategy a key action for MoE in the short term was to develop an outbound mobility strategy that includes a review of student scholarships and exchanges. In the current strategy this is set as a medium-term goal. It is recommended that this is recategorised as a short-term action. There is an opportunity to rebuild on the outbound mobility strategy work begun in 2019 between UNZ and MoE</p>		<p>This should be a short-term goal, as work had already started on a learning abroad strategy in 2019</p>