MINISTRY OF EDUCATION
TE TĀHUHU O TE MĀTAURANGA

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Briefing Note: International Education Strategy Implementation Update

To:	Minister of Education, Hon Chris Hipkins		
Date:	4 July 2019	**Priority:**	Low
Security Level:	In Confidence	**METIS No:**	1186042
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Messaging seen by Communications team:	Yes / No	**Round Robin:**	No

Purpose of paper

This briefing note provides a summary of progress made by international education agencies in the implementation of the International Education Strategy (the Strategy) since Ministers last met with officials on 3 December 2018.

This briefing note follows on from *Briefing Note: International Education Strategy Implementation Plan* [METIS 1163935 refers], which International Education Ministers received prior to the December meeting.

Summary

The briefing note summarises progress that has been made under a number of work streams of the Strategy, including work under each of the three goals of the Strategy.

Among the high priority work streams progressing are the review of temporary migrant exploitation (including international students), ensuring the Export Education Levy is sustainable and fit-for-purpose, monitoring the Education New Zealand Recognised Agencies Programme, and developing an Outbound Mobility Strategy.

The first report-back to Cabinet on progress against the Strategy is due in October 2019. We will provide you with a briefing and draft Cabinet paper in September 2019.

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Recommended action

The Ministry recommends that you:

a. **Agree** to set a meeting with the International Education Stakeholders Group in 2019.

Agree / Disagree

b. **Agree** that this briefing note will be proactively released.

Agree / Disagree

c. **Agree** to forward the briefing note to the Minister of Immigration and the Minister of Trade and Export Growth.

Agree / Disagree

Belinda Himiona
Group Manager
International Education
Ministry of Education

04/07/2019

Grant McPherson
Chief Executive
Education New Zealand

3/7/2019

Hon Chris Hipkins
Minister of Education

24/7/19

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Context

1. In August 2018, you launched the International Education Strategy (the Strategy), which set out a number of goals and actions toward achieving 'a thriving and globally connected New Zealand through world-class international education'.

2. This briefing provides you with a summary of progress against some of the key actions in the Strategy. As you will see from the updates below, the first phase of the Strategy has directed agencies' efforts to strengthening the areas of quality education, migrant exploitation and information to students. With the recent allegations of cheating and English-language issues of international students, as well as visa-processing delays, we have more work ahead to continue building the sector to align with the Strategy.

3. Agencies have also worked alongside the broader education work programme to ensure that the international education sector work aligns with and contributes to the objectives of these reforms.

4. During the next phase of the Strategy, we will focus effort on actions from the Strategy including global citizenship, regional development and continuing to grow high-value markets.

5. Our next Strategy briefing, which you will receive in September 2019 with a draft Cabinet paper, will provide a higher-level, more strategic assessment of how we are progressing against the goals of the Strategy, and will suggest some additions and changes to key actions and workstreams to assure that we remain on course.

Progress on Strategy actions

Goal 1: Delivering an excellent education and student experience

6. Goal 1 of the Strategy aims to ensure that international students receive an excellent education in New Zealand, and that they feel safe, welcome, and valued for the contribution they make to New Zealand while they are here.

7. Progress has been made against a number of the key actions under Goal 1, including the following:

Review the exploitation of temporary migrants and international students

The Ministry of Business, Innovation and Employment (MBIE) is leading this cross-agency work which has so far identified priority areas for a multi-year work programme, and delivered an interim independent research report on migrant exploitation in New Zealand (with the final report due in July 2019). The priority areas are making systems more robust and effective in preventing exploitation, protecting vulnerable migrants including students, and deterring and penalising non-compliant employers. A briefing was delivered to the Minister for Immigration (shared with the Minister of Education) in early April 2019, providing an update on the review and recommended lines of inquiry, and on the interim research findings. Options for initial changes will be proposed from July 2019.

Improving education and immigration information for students and providers

In May 2019, Education New Zealand (ENZ) officially launched *NauMai NZ,* the official government student experience and wellbeing platform for international students who are studying in New Zealand or will soon arrive. The platform addresses international students' needs for accurate, relevant and easily available information on such topics as visa conditions, work rights, workplace exploitation, regional advice to help students 'live like a local', suggestions to improve wellbeing and help with understanding kiwi slang and *Te Reo*. Immigration New Zealand visa approval letters for student visas now refer international students to *NauMai NZ.*

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For new students from overseas, the INZ email will include a link to a video message from Prime Minister Jacinda Adern, welcoming them to New Zealand and encouraging them to use *NauMai NZ*. ENZ is also developing a student email communications strategy to maximise uptake of the new platform and support international students in New Zealand.

Fund and support initiatives to enhance international student wellbeing

The Ministry of Education (the Ministry) administers an annual funding round for wellbeing initiatives under the International Student Wellbeing Strategy. Evaluations of the initiatives funded in 2018 have shown very positive outcomes for participating international students. Initiatives receiving funding in 2019 are well underway, with mid-year reports beginning to come in. *Inclusion* has been set as the theme for the next round of funding, which will open in July 2019.

Monitor the quality of international education provision

The New Zealand Qualifications Authority (NZQA) has strengthened the English language proficiency requirements for international students through amendments to Rule 18 of the *NZQF Programme Approval and Accreditation Rules 2018*. These changes include restricting the use of prior schooling in English as evidence of English language proficiency to schooling in certain English-speaking countries. These amendments will commence on 1 August 2019. This will contribute to efforts to increase the quality of provision to international students by ensuring that those students coming to New Zealand have the requisite skills to succeed in their study.

Implement and Monitor the Education New Zealand Recognised Agency Programme

The ENZ Recognised Agency programme was relaunched in November 2018. The new programme intends to contribute to the attraction of high-value students, and enhance the student experience, by providing increased and sustained support to quality education agents who are both promoting New Zealand as an international study destination, and successfully placing students at New Zealand education providers. ENZ regularly communicates with ENZ Recognised Agencies to ensure they have access to timely and relevant information in order to effectively promote New Zealand as a study destination, and to also provide information and guidance regarding topical issues. For example ENZ has recently communicated with Recognised Agencies regarding the Christchurch Terrorist attacks and the Reform of Vocational Education.

Ensure the Code of Practice evolves in line with the vision and aims of the Strategy

Amendments to the Code of Practice 2016 were published in March 2019, with changes coming into effect on 1 July 2019. The Ministry of Education engaged widely with the sector and worked closely with NZQA to ensure that the amendments can be effectively implemented and monitored. Significant changes include new contract and disciplinary protections, clarifying requirements for residential caregiver safety checks, more detailed requirements for managing and monitoring education agents, and more practical transfer of care requirements for students under 18. Other changes cover definitions and process requirements for residential caregivers, accommodation, insurance, orientation and student support.

Goal 2: Achieving sustainable growth

8. Goal 2 of the Strategy focusses on fostering a high-quality, high-value sector, valued for its unique New Zealand proposition, which flourishes through diversification of markets, and innovative products and services. It also aims to distribute the economic and cultural benefits of international education to the New Zealand regions.

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9. Progress has been made against a number of the key actions under Goal 2, including the following:

Ensure the Export Education Levy (EEL) is sustainable and fit for purpose

Consultation has just closed on the Ministry's proposal to introduce a risk-rated premium for the EEL, and a security deposit for Private Training Establishments. This would improve the fairness of the levy by imposing higher costs on PTEs in risk categories, and would support the Strategy by incentivising quality provision and responsible provider behaviour. The consultation also considered indexing the rates against actual expenditure to deal with the unpredictability of both revenue and expenditure of the EEL account. The Ministry held a consultation meeting in Auckland. Recommended changes will come to you in July.

Consider recognising English Language Schools as a distinct sub-sector

The Ministry has worked with NZQA to consider the request of English New Zealand to see English language schools recognised as a distinct sector through new legislation. They feel that bespoke legislation would lead to tailored regulatory processes which better fit their unique provision. You have received advice stating that we have concluded that legislation is not the most efficient or effective way to address the issues English New Zealand raises. Other work related to aligning quality assurance processes more closely with their model of provision will continue, with NZQA scheduled to observe the English New Zealand quality assurance processes in July 2019.

Work with providers to align their recruitment with national and regional skills needs

ENZ has completed the initial phase of the 'Emerging Futures' research project – an online summit involving prospective international students. The summit identified study areas that interest students and that might overlap with New Zealand's skills shortages. This work aligns with the 'Industry Futures' theme of sustainability and will be used by the sector to inform the development of new education products. Industry Futures, another Strategy workstream, is a pan sector working group that supports the goals of the Strategy.

ENZ has developed a workstream called Regional Talent Pathways to promote the attraction, development and retention of international students to fill regional skills shortages. Government-led work, including regional employment-matching hubs under the MBIE 'Pathways to Work' initiative and Regional Skills Shortage Lists, presents opportunities for international education to add value in the regions. Under this workstream, regional economic development agencies or local government, in partnership with education providers and business sectors, can apply to partner with ENZ to develop Regional Talent Pathways in 2019/20.

Goal 3: Developing global citizens

10. Goal three opens up the benefits of international education to our domestic students and our wider communities. It works to ensure that all students in New Zealand schools gain the knowledge, skills and capabilities to live, work and learn globally, that all New Zealanders understand and embrace the benefits of international education, and that international education provides stronger global connections, research links and strategic partnerships abroad for New Zealand.

11. Progress has been made against a number of the key actions under Goal 3, including the following:

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Develop an Outbound Mobility Strategy

The Ministry has initiated work to scope and develop an outbound mobility strategy. This work will includes a review of international student scholarships and exchanges, drawing on a review of inbound scholarships carried out recently by the Ministry of Foreign Affairs and Trade. Planning for the outbound strategy is informed by a recent review of literature on outbound mobility and engagement with key stakeholders. Objectives for the strategy will include increasing participation in exchange programmes among historically underrepresented groups, including students in lower decile schools, and Māori and Pacific peoples.

Monitor the effectiveness of the Centres of Asia-Pacific Excellence (CAPEs)

There are three CAPEs in New Zealand, launched by the Minister of Education in April 2018: the North Asia CAPE located at the University of Auckland, and the South Asia and Latin America CAPEs located at Victoria University. The CAPEs contribute to the development of Asia-Pacific knowledge and language skills in New Zealand and enhance economic, trade, political and cultural relationships with the region. The Tertiary Education Commission (TEC) is planning a mid-term review of the three CAPEs, to be carried out by an expert panel. Officials have established a mechanism, and terms and conditions for the review, which will happen in 2020.

Provide sector leadership to enhance the international education experience

ENZ launched a report, called Employer Perceptions of Hiring International Graduates, at the Global Internship Conference in Auckland on 3 July 2019. Previous student experience research confirmed employability is a key driver of student experience. This new report found New Zealand employers valued the keen attitude and positive contribution of New Zealand-educated international graduates. These findings will inform ENZ's student experience and regional employability pathways strategies as part of ENZ's work towards delivering on excellent student experience and sustainable growth.

ENZ is developing a new tool to measure satisfaction of international students throughout New Zealand across all parts of the sector. ENZ has collaborated with Immigration New Zealand, the Schools International Education Business Association and English New Zealand on access to a sample student population. Fieldwork was to have happened in April 2019, however following the Christchurch terrorist attacks, the survey will take place in August 2019, with results expected by late September 2019.

Help all students to develop global competencies

The Ministry is finalising a new curriculum resource, *Pūtātara: A Call to Action*, which supports schools and teachers to incorporate sustainability and global citizenship across the New Zealand Curriculum in Years 7-10. The resource will be launched at the beginning of Term 3 2019. University of Waikato researchers associated with the Latin American CAPE have mapped the New Zealand Curriculum against the OECD Framework in order to help teachers understand how and where they can introduce Pacific countries into their school's curriculum.

ENZ transformation agenda

12. ENZ's Board, under the leadership of its new Chair, Hon Steve Maharey, has developed a vision for how international education can have a broader impact for New Zealand. You met with the ENZ Board Chair recently to discuss this vision.

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13. The Secretary of Education sponsored the ENZ Board Chair to meet with Chief Executives of the Economic Sector Leadership Group on 25 June 2019, who endorsed the vision. Over the coming year, ENZ will conduct a feasibility study to identify opportunities for the next stage of the vision, for renewed endorsement from these Chief Executives.

International Education Conference – 7-8 August 2019

14. ENZ is hosting the annual New Zealand International Education Conference and Expo in Auckland on 7-8 August 2019. The theme of this year's conference will be "navigating our changing world". You will be a keynote speaker, and material is being prepared currently for this. The Ministry and ENZ are planning a panel session involving senior international education agency officials to discuss progress on the Strategy. Other activities are planned at the conference to celebrate the first anniversary of the Strategy.

ENZ Market Update

15. The A3 document attached to this briefing note provides a market update from ENZ, covering how New Zealand is viewed by prospective students against our competitors, the strength of ENZ's digital marketing, and how the sector picture of international students in New Zealand is changing.

International education and the Christchurch attacks

16. The mosque attacks in Christchurch on 15 March 2019 had an immediate critical impact on the international education community and sector. Agencies worked alongside communities and students in Christchurch, as well as international student communities in other areas (for example Auckland) to ease distress and provide support. In April 2019 ENZ transitioned from compassionate-based messaging to strategic messaging that emphasised themes of manaakitanga and global citizenship.

17. Some of this activity does not currently fall under the specific actions in the Strategy, although it does align with the excellent education and student experience goal. Our first report-back to Cabinet in October 2019 will give us the opportunity to integrate some of these actions into the Strategy as on-going and longer-term work streams.

18. Some early evidence suggests that the attacks may not have the negative impact on New Zealand's reputation that some feared. For example, New Zealand was named the second most peaceful country by the 2019 Global Peace Index following the attacks. Feedback received by ENZ in April 2019 suggested the strong New Zealand public and political response was well received internationally. As at June 2019 ENZ is not seeing significant negative impact internationally from the attacks.

19. Because the government is focussed on inclusion in the wake of these attacks, we have made inclusion (which is one of the four pillars of the International Student Wellbeing Strategy), the specified theme for the next round of funding proposals under the Wellbeing Strategy. We will look to fund proposed initiatives whose aim is to improve and increase the inclusion of international students in student life and in community life.

Updating the Strategy

20. The report-back to Cabinet in October 2019 will give us an opportunity to update the Strategy to include developments since it was launched, and to align it with any shifts or developments in government priorities.

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Next Steps

21. Advice to Ministers and Cabinet on progress on the International Education Strategy and its key actions includes:

Advice to Ministers	
July 2019	Export Education Levy recommended changes
July 2019	Migrant exploitation: findings and changes to test with stakeholders
Sep 2019	Evaluation report: impacts of changes to post-study work rights
Sep 2019	International Education Strategy briefing and draft report-back Cabinet paper
Sep 2019	Outbound mobility strategy
End of 2019	Review of student living costs requirement
Advice to Cabinet	
Aug 2019	Migrant exploitation: seeking approval for public consultation
Oct 2019	Report-back on International Education Strategy
Dec 2019	Migrant exploitation: final suggestions

Annex: A3 ENZ Market Update (separate document)

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International Education Market Update July 2019

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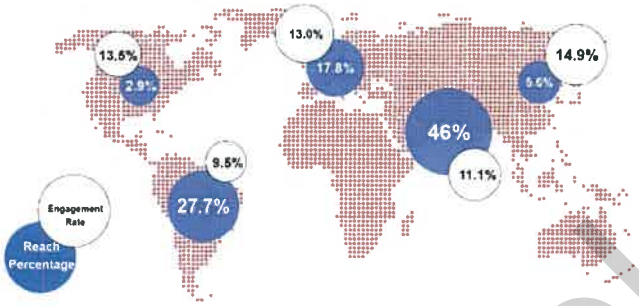
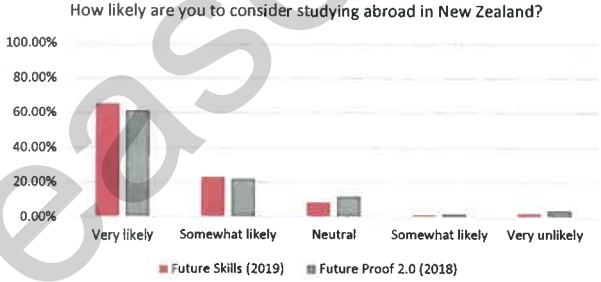
Prospective students consistently view NZ as being in the running*

ENZ's 2019 digital marketing campaign reached 42.2m prospective students globally**



Source: Global regional stats from ENZs first global campaign of 2019 – called Future Skills

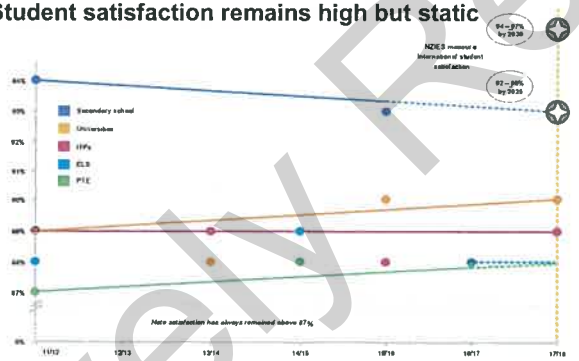
ENZ marketing campaigns are effective in targeting prospective students



Source: Polling of ENZ campaign audience: 2018 and 2019. Polling size: approx 1200.

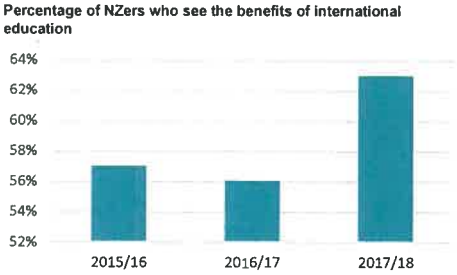
New digital platform to improve international student experience and wellbeing***

Student satisfaction remains high but static



Source: i-Graduate International Student Barometer surveys conducted between 2011 and 2018

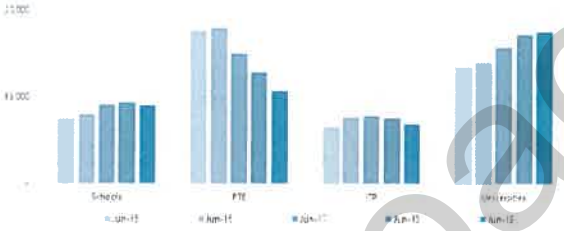
New Zealanders increasingly see the value of international education



Source: Understanding New Zealanders' perceptions of international education reports, over 3 years

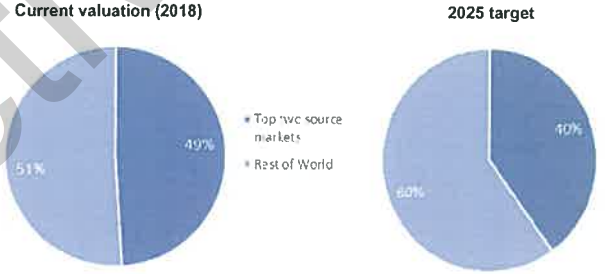
The sector picture is changing

Valid student visas by sector for June 2015 to 2019****



Source: INZ student visa data

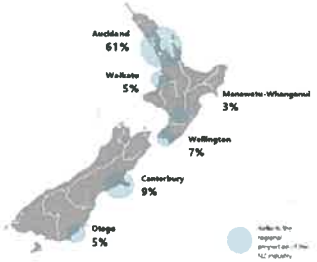
We are working to diversify our source markets



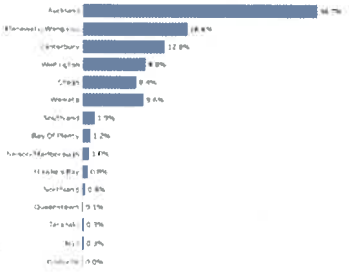
Source: Economic Valuation of International Education in New Zealand 2018 and The Value of New Zealand's Education Exports 2018

ENZ's digital tools show promising results for regional growth

Proportion of international students studying in regions in 2017



Regional spread of shortlisted courses on MyStudyNZ



Source: 2017 enrolment data and MyStudyNZ shortlisted courses as at 1 June 2019

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* IDP International Education Specialists – International Student Buyer Behaviour Research 2018

** Reach percentage: the percentage of target audience reached through the campaign / Engagement rate: the percentage of students who go on to interact with campaign content

*** NauMai NZ is an online digital platform that has been designed to support international student experience and wellbeing in New Zealand. It includes pre-existing information, bespoke content and links to expert resources.

**** The Valid Student Visa (VSV) data represents the number of student visas at a point in time. This data is used by ENZ as a real-time proxy for enrolment data.

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