

NZQA AND INTERNATIONAL EDUCATION RECOVERY

# Challenges and opportunities in international education

John Goulter  
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**NZQA**

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**Ko te manu ka kai i te miro, nōna  
te ngahere. Ko te manu ka kai i te  
mātauranga, nōna te ao.**

The bird that partakes of the berry,  
theirs is the forest. The bird that partakes  
of knowledge, theirs is the world.

(Te Kere Ngataierua, Te Āti Haunui-a-Pāpārangī)

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# Summary

In the Government's 2020 Strategic Recovery Plan for International Education, NZQA was tasked with ensuring quality in the online delivery of education offshore.



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**As a preliminary step, NZQA commissioned this report to take soundings among education providers about their expectations and needs, and their appetite for new modes of international education delivery.**

Moving content online is both an immediate response to the border restrictions of COVID-19 and, in the longer term, a channel for New Zealand education providers to extend their reach far broader than would ever be possible through providing solely for international students who visit New Zealand to study.

NZQA wanted to know what providers are contemplating in the environment of COVID-19 and beyond, the obstacles they are encountering, and what NZQA might do through its settings and practices to enable high quality international education which delivers the best outcomes for learners, for providers and for New Zealand, in line with the New Zealand International Education Strategy.

This is not a survey of plans or a consultation around a programme of initiatives. Instead, it is a snapshot of the situation of international education providers as they contemplate the post-COVID-19 environment and to hear their current thinking and priorities. In a still-evolving environment, NZQA wanted to ensure its own practices are well informed.

At the core of this report is a series of interviews with people in many parts of the sector. Some comments are anonymous. Most are not. Other external sources have come from publicly published reports and are referenced in footnotes.

The key themes that emerged are:

- Many providers at all levels are currently focused on the return of students to New Zealand as the best hope for recovery. Few see online education alone as a viable or desirable path for New Zealand.
- Projections for the return of students to New Zealand estimate it may be up to a decade before numbers return to pre-COVID-19 levels.
- Across Government there is an agenda to ensure that the rebuild of international education does not replicate the past but builds on value, diversity and quality.
- Online delivery is likely to become more important as a pathway towards study in New Zealand, but its enduring role as a pathway channel to study in New Zealand will depend on factors including the correlation of online study experience and subsequent visa status for study in New Zealand.

- Most sectors believe an in-New Zealand component will be critical, but it should be part of the mix, not the total proposition. Most providers believe that in-country delivery will continue to have a central role in international education, reflecting the networks, language and cultural skills and employability attributes of in-country learning.
- While there is a strong view from many providers that in-person recruitment of students to study in New Zealand will remain at the centre of New Zealand's international education offering, this will be complemented in time by a growing focus on broader arrangements including partnerships, trans-national education, online and offshore delivery.
- For some specialist providers, future international education will be characterized by a hybrid model of delivery including in New Zealand, online, offshore and trans-national modes.
- These modes will be costly, long-term and difficult to develop and manage, but they have potential to generate revenue and contribute to the deeper internationalisation of New Zealand's education sector.
- Within qualifications or a student's learning experience, there may be multiple learning models – some in New Zealand, some in home countries, some in a classroom, some within industry experience.
- Within wānanga and other providers there is a rich field of practice emerging which ranges from incorporating Māori approaches into learning and training schemes through to embracing an indigenous world view to shape teaching and learning. Some are developing strong international connections and resonance.
- International students – who are likely to include a growing number of lifelong learners – will expect more flexibility and agency in structuring their learning paths. Some students' learning and many qualifications may encompass all modes.
- The approving environment within NZQA (and across other agencies) will need to shift to accommodate this hybrid model, replacing a binary view of onshore or offshore, in person or online.
- In parallel with building the post COVID-19 world, the ITP sector is engaged in the generational change represented by Te Pūkenga, which will bring a sea change in delivery of international education from that sector.
- The reformed code of practice for international students, sitting within the new overall code of pastoral care of students, will need to reflect the diversity of modes that international students are experiencing and underpin New Zealand's commitment to the quality of the student experience and education.
- The growing range and complexity of delivery models for international education do have the potential to offer more options for students, and broaden the base of international education on New Zealand. But they will be difficult and challenging for providers to manage, and they will pose new issues for regulators to manage in areas including immigration settings, the educational approvals process, quality assurance and student experience and wellbeing.
- International education is a highly competitive field and will become more so in the rebuild following COVID-19. New Zealand will need to have a strong, clearly articulated proposition to offer, requiring strategic thinking across agencies and providers and co-ordination across product design, delivery and regulation.
- The three goals of the New Zealand International Education Strategy – excellent student education and experience, a sustainable sector, and global citizenship – are still relevant and useful signposts within an environment that has been reshaped by COVID-19.



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## Considerations for NZQA

### Embracing hybrid delivery

Current settings and rules reflect the past binary reality in modes of delivery and the make-up of qualifications of in-person or online, in New Zealand or offshore. Through technology, learner demand and the disruption of COVID-19, the future will be more mixed and complex, bringing new opportunities and options for learners and providers.

NZQA will need to ensure its approach is equipped to enable that complexity and ensure decision-making and quality assurance in a more fluid environment.

### Working with Te Pūkenga

The reform of the ITP sector has the potential to create an international offering that is more sustainable and aligned with the needs of learners and New Zealand. However, much of Te Pūkenga's international thinking is still nascent.

NZQA will need to work with Te Pūkenga and its subsidiaries to facilitate the transition to a new environment and enable the future international strategy of the sector. This is potentially a new type of partnership for NZQA as regulator. At its core this could focus on a set of co-designed principles to guide international delivery and quality assurance. Stakeholders believe it is important that the groundwork is in place now between Te Pūkenga and NZQA in preparation for the return of students.

### Leadership and guidance

As the international education sector confronts the COVID-19 disruption and long-term structural change, there is uncertainty and tension about the way forward. It will be a more complex operating environment.

There is potential for NZQA to support its regulatory functions with more active customer-focused guidance, thought leadership and sharing of best practice. This could include more explicit sharing of audit practices and outlining of what good looks like.

### Product design and development

Rather than expecting the market to revert to pre-COVID-19 patterns, there is an opportunity for agencies and providers to work together on products to match international and New Zealand needs. Specifically, this will require collaboration across NZQA as regulator and ENZ as New Zealand's international marketing coordinator, along with key providers such as Te Pūkenga.

### Māori knowledge and world view

The model NZQA has developed with wānanga of a Māori world view and approach to learning within a credentialled education framework has strong resonance internationally, opening up possibilities more broadly for international education delivery and collaboration with offshore partners.

## **Hearing the voice of the learner**

International learners will be more demanding and discerning and have more options. NZQA's administration of the repositioned Code of Practice brings an opportunity to actively listen to learners and their needs, in a way few other administrations do.

The combined domestic and international code will be an opportunity to support the global citizenship aspirations of the New Zealand International Education strategy, for both domestic and international learners.

## **Quality assurance**

In a more fragmented landscape of different modes of delivery and micro-qualifications, the quality assurance functions of NZQA will be critical; it will be challenging to ensure that practices are fit for purpose while underpinning quality.

## **Timeliness and effectiveness**

NZQA must continue to ensure its processes are as simple, effective and accessible as possible. In the recovery of the disrupted international sector, this could be represented in a Charter, for instance.

## **Transitional issues**

The next 18–36 months will see continued uncertainty, faltering steps to recovery and new hurdles. It will be critical for NZQA to be alert and responsive, and able to demonstrate its commitment to recovery through transitional steps such as the treatment of online approvals.

# The COVID-19 context

## Internationally and in New Zealand

### COVID-19 disrupted a sector that was already in transition.

International education has long been acknowledged for its economic contribution to New Zealand. The economic contribution of the sector peaked at up to \$5.23 billion in 2019<sup>1</sup>, including \$1.21 billion directly paid in tuition fees to providers. At the time, the sector was ranked New Zealand's fifth most valuable export by Statistics New Zealand.<sup>2</sup> A total of 131,609 international students enrolled with New Zealand providers over the course of 2016, the high point of onshore student numbers.

Since the Government's adoption of the New Zealand International Education Strategy (NZIES) in 2018, providers and policy-makers have been encouraged to use a more holistic lens, encompassing global citizenship aspirations for both domestic and international learners, the quality of the education and experience that New Zealand can offer and the sustainability of the sector's approach.

New Zealand's share of the world's internationally mobile students has stood at 2 to 3% in recent years, a small slice compared with bigger players such as the United States, the United Kingdom, Canada and Australia, but still a segment that has had a significant influence on the country's education providers and their communities.

Before COVID-19, successive policy interventions, culminating in the New Zealand International Education Strategy, had attempted to move the sector from a focus on volume to value, shifting the focus from numbers of inbound students to the strategy's broader goals and to deeper, more enduring notions of value. These initiatives were bringing results. Between 2016 and 2019 the number of international students in New Zealand decreased by 15,900 annually but the value of tuition fees they paid increased by \$126 million<sup>3</sup>. Another important marker of the shift from volume to value was the growth in university enrolments.

In July 2020 the Minister of Education announced the Government's International Education Recovery Plan in response to COVID-19 which included three concurrent workstreams that focus on stabilising the international education sector, strengthening the system, and accelerating the transformation of the sector.<sup>4</sup> The package had a focus on repositioning international education for a different future:

*“Achieving the potential of the sector will require strengthening and resetting aspects of the system to address some underlying issues. These include reliance on certain markets and low-value, high-volume business models which have generated quality issues and financial risk for parts of the sector, including Crown owned institutions. It will also require a multi-year investment in marketing, building capability within the sector and re-orienting the sector towards more sustainable business models.”<sup>5</sup>*

1 2019 Value & enrolments in international education to New Zealand, Education New Zealand website, January 2021.

2 Statistics New Zealand, Goods and Services Trade by Country for the Year ended December 2019.

3 The Insight Story, Education New Zealand, January 2021.

4 Recovery plan for the International Education Sector, Education New Zealand website, June 2020 [enz.govt.nz/home/recovery-plan-for-international-education-sector/](http://enz.govt.nz/home/recovery-plan-for-international-education-sector/).

5 Cabinet paper: “A Strategic Recovery Plan for the International Education Sector,” Minister of Education, 22 June 2020.

Much of the policy work, and the “strengthening and resetting of aspects of the system” outlined in the recovery plan, is scheduled to be completed in 2021.

More than 5 million students annually were crossing international borders to pursue education before the arrival of COVID-19.<sup>6</sup> The tide of internationally mobile students travelling internationally to pursue their education had been growing by an average of 10% a year for the last two decades – despite disruptions such as the SARS outbreak of 2003 or the global financial crisis of 2007-08.<sup>7</sup>

Internationally, as in New Zealand, an initial response to COVID-19 was a rapid move to offer options online. The COVID-19-induced move online, some concluded, was an overdue ground shift away from a business model that no longer delivered what the market needed:

*Education is one of the least digitized and most people-intensive economic sectors – suggesting that the opportunity for and risk of technology-driven disruption is strong. Following a slow, two-decade march toward more digital business models, higher education’s overdue technological transformation has been rapidly accelerated by the events of 2020, and centers more than ever on technology- and analytics-driven online learning experiences and business models.<sup>8</sup>*

Through that lens, COVID-19 is both a crisis and an inflexion point for change, hastening the trend from “one-and-done degrees and toward lifelong learning and upskilling”:

*The market is increasingly demanding that colleges and universities move beyond bachelor’s degrees as their primary product, toward more nimble, lower-priced, digital “credentialized packages” of learning and mastery valued by employers – which will be essential in a digital economy where continuous upskilling is needed to keep pace with technological advances and the shrinking shelf-life of skills.<sup>9</sup>*

Similarly, many have pointed to COVID-19 as a prompt to foster the development of transnational education (TNE) partnerships, joint qualification arrangements and the use of technology to cater for the increasing complex needs of students across borders.

*For mobile students who may only partially participate in distance TNE, universities certainly face challenges in developing more high-quality online courses and programmes across different academic disciplines while still maintaining relatively low tuition costs.*

*For the immobile students, universities need to make efforts to adapt the course content to different country contexts so that learning can be better applied in students’ local professional settings, and therefore, meet their career needs.*

*Lastly, for all international students, learning should be about much more than individual students’ engagement with course content and assessment. Universities should intentionally foster online learning communities by creating social spaces within and outside of the ‘classroom’ for meaningful professor-student and student-student interactions.<sup>10</sup>*

6 Internationally Mobile Students, Global 2011 – 2017. 9 June 2020. [migrationdataportal.org](https://www.migrationdataportal.org)

7 BizEd, AACSB International. 11 June 2020. International Student Mobility and the Impact of the Pandemic.

8 Gallagher, S. & Palmer, J. The Pandemic Pushed Universities Online. The Change Was Long Overdue. Harvard Business Review. 29 September 2020.

9 Ibid.

10 Li, X & Haupt, J. Could ‘distance TNE’ become a growth area after COVID-19? University World News. 13 February 2021.

While some commentators have pointed to a rapid return to globally mobile students after COVID-19, with a surge of pent-up demand after borders begin to re-open, there is a consensus around a more cautious return to widespread education travel. Simon Marginson, Director of the Centre for Global Higher Education at the University of Oxford has estimated it will be at least five years after the pandemic before student mobility returns to normal. In the same report, Shearer West, Vice Chancellor of the University of Nottingham, echoed the view that COVID-19 would force a permanent break with the past: "Global higher education as it exists now is in danger of fast obsolescence but, in my view, we need to be imaginative in how we reinvent that for that post-COVID-19 generation."<sup>11</sup>

An example of the heightened expectations of a transformed international education has been the hype surrounding the United States online provider Coursera's imminent listing on the New York Stock exchange. Coursera expected the IPO to roughly double its valuation to US\$4 billion on the strength of its post-COVID-19 prospects.<sup>12</sup>

Even before COVID-19, there were some growing questions about the sustainability of a sector based on international flight. Concepts such as flight shame – which originated in Sweden as *flygskam*, the unease felt by environmentally conscious travellers about carbon emissions – began to surface as an awkward consideration that international education providers would eventually have to confront.

As an international education destination about as distant as is possible from many source countries, New Zealand was beginning to wonder how it could ensure true sustainability in all senses.

Since the publication of the New Zealand International Education Strategy, Education New Zealand (ENZ) had been developing proposals for how the country might broaden its international education offerings and, through moving to digital delivery, appeal to a far bigger number of potential international learners who could access New Zealand education online.

A challenge for New Zealand is the country's relatively low number of international partnerships, offshore campuses and trans-national ventures. While there are instances of such arrangements, they have been fewer and less successful than, for instance, those operating out of Australia or the United Kingdom.

Instead, New Zealand education providers have looked to the global recognition of the country's success in managing COVID-19 to help position the country's global education outreach.

Research has pointed to a heightened recognition of New Zealand during COVID-19. Online consumer focus group research conducted for the New Zealand Story in Australia, the United Kingdom, the United States, China and Germany identified some strong positives for New Zealand including the government's management of the pandemic, the harnessing of the "team of five million" and renewed differentiation between Australia and New Zealand.<sup>13</sup>

The same research, however, found some "shadows" in the global perception of New Zealand – chiefly that the swift handling of COVID-19 fed into a view of New Zealand as remote from the rest of the world and sparsely populated, and in some ways more distant than ever. In the United States focus group, the research identified some highly desirable strengths that COVID-19 had brought to the fore – authentic leadership, a humanitarian stance, safety and indigenous pride; but it was summed up with a paradox: "A country that opens your mind, if you can get there."<sup>14</sup>

11 Bothwell, E. Coronavirus: global student flows to suffer 'massive hit' for years. [timeshighereducation.com](https://www.timeshighereducation.com). 26 March 2020.

12 Reuters. Online education platform Coursera targets over \$4 billion valuation in U.S. IPO, 23 March 2021.

13 Global Pulse Check, Understanding how the COVID-19 pandemic has shifted perceptions of New Zealand amongst key markets. Prepared for New Zealand Story by One Picture. June 2020.

14 Ibid.

A parallel issue was found in the surveys of international education agents carried out by Australian-based education provider Navitas. In surveys done in May and September 2020, New Zealand's handling of COVID-19 put its ranking at number one, ahead of Canada, the United Kingdom, Australia and the United States.<sup>15</sup> But interest in the country as a study destination was second to bottom in the same list, mainly as Canada and the United Kingdom positioned themselves strongly for an international resurgence based on both education and immigration settings.

In the most recent round of Navitas research of agents' perceptions conducted in March 2021, interest in New Zealand as a study destination declined by 17 percentage points, six points more than Australia's decline. Interest in other countries such as the United States, Canada and the United Kingdom was rebounding strongly.<sup>16</sup> In the same survey, agents ranked New Zealand the least likely of ten education destinations to be receiving international students in the second half of 2021. According to the Navitas research, the two factors behind New Zealand's slide in "open and welcoming" perceptions are the ongoing uncertainty about when borders will open and the absence of any visa processing in the meantime.

Within New Zealand, the immediate response to COVID-19 among most providers has focused on survival rather than transformation.

Across all subsectors, 2021 has brought a realisation that the downturn of 2020 was just the beginning. International revenue estimates are being further revised downwards as sectors come to the realisation that, with the exception of the 1,250 mainly degree and postgraduate level students to be admitted under exemptions to the government's managed isolation and quarantine programme, another calendar year will pass without the arrival of significant new cohorts of learners.

In its most recent projections, Education New Zealand is assuming a very slow return of students coming to New Zealand to study. ENZ's presentation to university international directors in March 2021 projected that total international enrolments in New Zealand, across all sectors, would reach a low point of 18,000 in 2023. ENZ assumed the rebuild of student numbers would continue to be gradual, only returning to pre-COVID-19 levels of 86,000 by 2030.<sup>17</sup> ENZ pointed to precedents such as the China market crisis of the early 2000s and the Christchurch earthquakes, both of which were followed by decade-long recoveries. Some providers, however, are more optimistic that their international markets will recover more quickly once restrictions are lifted,

ENZ's strategy to foster a more diverse and sustainable international education sector includes a focus on fostering "knowledge diplomacy" through boosting areas such as academic research and collaboration, government to government connections and cultural competencies, and by fostering more joint ventures offshore, online delivery and blended delivery and the export of educational technologies.

The views of providers have been expressed strongly through a series of 'deep dives' on the Government's education recovery plan which Education New Zealand and the Ministry of Education held with sub-sector groups over February and March 2021 and reported back to peak body groups on 17 March 2021.<sup>18</sup>

15 The road to recovery. Navitas presentation. March 2021.

16 Navitas Agent Perception Report, Findings from agent research conducted in March 2021.

17 McPherson, G. ENZ Update; Build Back Better. ENZ presentation to universities international directors. 29 March 2021.

18 Update on the sector deep dive workshops. ENZ presented to ENZ/INZ peak body forum. 17 March 2021.

In the short term, providers including schools, the polytechnic sector, PTEs and universities are pushing out their scenarios for any significant return to international education. There has been a strong focus on looking after and holding onto existing international students and maintaining the minimum staff, infrastructure and relationships they will need to resume international activities in the future.

In that environment, some providers are impatient and frustrated with talk about long-term structural change. Agencies need to understand that frustration.

As part of the International Education Recovery Plan, NZQA has been meeting with providers, both from individual institutions and at a peak body level, to try understand what the re-emergent international education sector could look like in New Zealand and what NZQA can do through its settings and practices to enable recovery. NZQA's discussions have focused on ITPs, PTEs and schools and also included engagement with wānanga and universities.

The following sections highlight key issues within each sector, along with some individual case studies and practices.

# Private Training Establishments

## A sector in change

Even before the arrival of COVID-19, New Zealand's PTEs were facing major change. A series of regulatory changes and actions to ensure quality, and efforts to diversify New Zealand's international education source markets were driving change across a sector which had grown substantially in recent years, fuelled by growth in numbers from India and China. Much of the growth had been clustered in Auckland.

Funded PTEs – those who cater for domestic New Zealand students alongside international students – dropped from a peak of 18,690 international students in 2015, to 10,600 in 2019. The corresponding tuition fee drop was from \$145 million in 2015 to \$111 million in 2019.<sup>19</sup>

Unfunded PTEs – focused solely on the international market – dropped precipitously from a high of 19,790 students in 2017 to 8,850 students in 2019. Across PTEs, closures, mergers and consolidations were becoming common.

The English language sub-sector had held up more strongly, around the 20,000 to 25,000 mark between 2015 and 2019. Although many English language students stay for short periods, combining their learning with a holiday or working experience, the English language sector was still earning \$77 million in tuition fees in 2019.

In response to COVID-19, many PTEs took up the opportunity to apply to NZQA for temporary approval to deliver courses online in 2020 designed as a stop-gap measure to reach students stranded offshore because of border closures.

Some PTEs used the temporary approvals to retain a valuable stream of students. And while they argue for continued rollover of temporary approvals, they say the task is becoming harder, as other international options open up for students or they get to the point where they need to get practical, hands-on experience.

Many PTEs saw temporary approvals as an insurance policy to keep engaged with students, and to rebuild the pipeline for when students can return, but have found the uptake was lower than anticipated. PTEs see several reasons behind that, including a reluctance to study practical subjects or languages online, and the fact that online study would not accrue towards work or residency rights in New Zealand.

<sup>19</sup> ENZ data. March 2021. Other data on student numbers and tuition fees in these sectors comes from the same source.

Given the continued closure of borders in 2021, many of the same PTEs do however want continued exemptions, though some are reluctant to apply for permanent exemptions, arguing that the process is too onerous or that their prime focus is still on a return to face-to-face learning when that becomes possible.

Some PTEs point to issues which they believe have restricted the ability to uptake temporary online learning, including a restriction to focusing solely on students who already had entry visas approved. Some PTEs say the concern that some students could effectively become stranded – having studied for part of a qualification from offshore online, but unable to get a visa to complete their studies in New Zealand – has restricted the ability to continue delivering online,

Some PTEs have been exploring the possibility of tiered degrees, delivered partially offshore and partially in New Zealand. This is a hybrid model that the Pacific International Hotel Management School, for instance, believes would be feasible. Under such an arrangement, they consider that a student could study theoretical components of their course in home countries such as Cambodia or Vietnam then subsequently come to New Zealand for operational training and industry placements. The risk of “stranded” students has prevented such arrangements with offshore institutions, unless students could complete the full qualification offshore with a partner, or the PTE could invest in full facilities for offshore industry training.

Some PTEs have had more experience with co-delivery arrangements, but say approval requirements can become “onerous” when facilitators or tutors from seven or eight offshore institutions might be in place to supplement online learning. According to one provider:

*// If you use facilities of offshore partners to deliver training, or a co-facilitator to bring online students together, you have to go through an offshore application which includes due diligence on the organisation, demonstrate the capability of their lecturers, report on their facilities such as their safety, their internet access for students, even if it is just co-delivery. That might be fine if you are just working with one, but if you have five or ten such partners, it becomes a real burden.*

*Surely we can be more clever than that, and recognise that we are all doing our own due diligence already because we are committed to making a success of it. If you are delivering out of New Zealand, using technology from New Zealand, and all the student is doing is sometimes sitting in a classroom overseas, surely you don't need such full approval.”*

Others point to suggestions such as having a national list of approved offshore facilities providers could use.

There are many views in the PTE sector about future recovery paths. Some, such as the English language sector, argue strongly that for their core 'language travel' offering there is no real alternative to local delivery, where students can learn face to face and have a New Zealand experience. The sector believes there may be more potential for online delivery where qualifications are more important, such as in academic pathways or language teacher training. This view reflects the sector's strong track record of delivery at the nexus of tourism and education.

Some PTEs reject successive years of messaging from Government that international education must move away from positioning itself as a pathway to migration. In the words of one PTE:

*// There is a naive view that the majority of students come to New Zealand for the quality of our tertiary education. That's simply not true. You might get the odd PhD or Auckland University student who comes here for the education, but the vast majority are coming here for work rights and residential pathways."*

Other PTEs argue that New Zealand's attraction, like that of most countries, will inevitably have to include access to work experience, and that a practical, vocational component can be the special component that makes a New Zealand education stand out.

*// Whether it is land-based agricultural qualifications, or commercial flying training, that is something New Zealand does so well. Even a short course can give them hands-on experience they can't get elsewhere. It means they really know what they are learning about."*

Some providers are pursuing options which they believe will deliver to New Zealand's strengths in an online, or 'blended' world. Hawke's Bay-based Workforce Development, for instance, has built a domestic operation which focuses on health care training largely for adult learners in work looking to extend their credentials. They believe the tutor-led, online model they have developed could have potential in China and South East Asia, for instance. They believe Māori and Pacific concepts of childcare have strong resonance with Asian learners, delivered in a blended model, with face-to-face tutorials supplementing online learning.

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## Frances Valintine

### Catering for mobile, discerning learners

As an educational innovator and future thinker, Frances Valintine has long been concerned about in New Zealand's low rates of professional development. She has built a number of initiatives catering for part-time, graduate professional training, such as The MindLab and Tech Futures Lab. To grow those initiatives, accessing larger international markets, Valintine has been pursuing offshore possibilities, including micro-credentials delivered via the international learning platform and aggregator FutureLearn. One possibility is a credential that trains teachers to become effective online teachers.

Valintine has encountered challenges gaining approval to deliver the online qualification, including pastoral care obligations and services for students who in all likelihood will never study in New Zealand.

"These are high quality, busy, discerning students. We have to be much more flexible and organic in what we can offer them. Post COVID-19 a whole lot of education has become democratized as educators have put content online. Now you can take a view of the whole world from your laptop – so the competition is great. So we have to be so bold."

Valintine believes that having gone through the trauma of COVID-19, many people will be expecting new, more flexible options in their learning, including blended offshore, online and in-person delivery.

"If we don't act fast, we will force international education back into the old mould. We could create a new education environment – with interlinked fluidity between in person, online, in NZ, offshore. What if there was a New Zealand Education Story, with high quality content from multiple providers, for domestic and international learners? Yes, we are a country that is isolated, but we have amazing connections, we have a space industry, we have a creative industry, we do software well. We need to create a strong, compelling online mobile presence."

Valintine considers that policies, settings and marketing across government agencies need to be more aligned. She believes part of the approach needs to be making it easier for offshore universities and other providers to establish operations in New Zealand. "It has to be a joint NZQA, ENZ, INZ thing. The brightest people in the world won't want to come to New Zealand unless we give them good reasons. They have a lot of options. We have to find reasons to attract them online or whatever. Don't make the barriers so high."

As PTEs – and other parts of the sector – have explored online delivery and offshore partner arrangements, some have also raised questions around pastoral care, where new modes of learning make pastoral care a more complex area. Where does pastoral care responsibility sit if a student is studying with a New Zealand provider from within their own home in another country? How does it differ if they are using facilities of an offshore partner? An online learner straight out of school will face different issues from a mid-career professional looking for credentials to open up their next professional step.

Likewise, expectations of paid employment alongside study might vary markedly between countries or what would be regarded as the norm for in-person study in New Zealand. The Code of Practice for International Students was designed for a world of travel and in-person study by learners of school and tertiary age. How could it reflect, for instance, an environment of lifelong learners, studying in a range of settings – at home, with providers in other countries and in New Zealand.

In the face of new circumstances and challenges, some PTEs say they would like to receive more guidance from NZQA on such questions or even have access to a “consulting” division, where they could raise issues and ideas for discussion and advice.

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## Media Design School

### Targeting new segments

In the COVID-19 environment of 2020, the Auckland based Media Design School, which targets digital and creative qualifications, rapidly took up the opportunity to transfer about 800 students and 80 staff to a primarily online learning.

It was able to draw on the experience of its parent company, Nasdaq-listed Strategic Education in the United States, and its fellow campus, Torrens University in Australia. Central to Strategic Education’s mission is mid-career learning for in-work professionals, so online is a big part of its proposition. Since COVID-19, MDS has been developing that stream alongside its New Zealand-based in person learning model.

MDS has achieved permanent approval to deliver online for almost all of its programmes, because the proposition is central to its growth plans. It has been using the “off-the-shelf” delivery portal Blackboard with more platforms integrated in to it as required.

The New Zealand country director for MDS, Ruth Cooper, says its model being built focuses on the quality of the education rather than the delivery channel.

“All of our classes are taught in the classroom and at the same time we are still teaching online – so in principle we are still teaching whether students are locked out of New Zealand in China, in Dunedin, or at home in Auckland with a cold.” Cooper says some of the approvals have taken longer than desirable but the process has been relatively straight-forward.

“We’ve had to answer questions like how were we’re going to engage our learners, how were we’re going to report, how we assess, and how we will undertake moderation, but they are all things we need to be thinking about.”

Cooper does believe there is scope for NZQA in future to provide more guidance about the developing online world. "Some guidelines around the online product itself would be good – there are varying degrees of understanding of what a quality online platform would look like. There's an opportunity for NZQA to set a standard to ensure New Zealand providers produce high quality learning that can set an example globally. Catering largely for school-leavers and busy, working adults, Cooper believes ongoing engagement is a challenge for online learning providers. "However you do it, there has to be a person accessible that students can engage with, but there are a lot of ways to provide that. That includes synchronous and asynchronous learning, which we need to be flexible about."

There are rapidly growing international disciplines around areas including quality assurance, moderation and options such as virtual internships, and Cooper believes there is a leadership role for NZQA in ensuring New Zealand learners have access to world best thinking and practices in online learning.

MDS CEO Darryn Melrose believes, as New Zealand emerges from COVID-19, it would be timely to revisit rules and settings that were put in place for a very different environment:

"COVID-19 has exacerbated change was happening already. But the rules for offshore provision are really drafted around the mindset of campus-based provision.

"What if you're developing qualifications for online delivery, no matter where you are around the world? We are catering for people who may never study in New Zealand, and may want to work in many international markets, so we have to apply an international industry fitness test.

"The working adult market is new for us, and it is an enormous global market. We want to launch a new qualification, subject to NZQA approval – a Master of Digital Transformation. Students could study micro credentials, stack them to a post-graduate certificate or diploma, or carry on to a masters, while they are working."

Melrose says MDS has been tossing up whether it takes a New Zealand qualification to the international market, or even seek dual accreditation with the United States. "If it is a New Zealand qualification, NZQA will want to visit, see the campus. But we may not have a campus. We might have drop-in centres, maybe operating an intensive study mode for a few weeks, but it could be fully online. So the existing rules are based on a campus and partner mindset that may not be the best model for us offshore."

Melrose believes there is an opportunity for New Zealand to take a world leading approach, bringing together areas where it has acknowledged expertise, with creative learning approaches.

"The new advice from NZQA on stacking micro credentials could be world-leading. MDS is genuinely one of the best in the world at what it does, but we are in a tiny market that no one really knows about it, so we are not immediately relevant to a Disney, or Hollywood or whoever.

"Right now, we've got New Zealand's first bachelor's degree in artificial intelligence, but where do we take it? In New Zealand you can innovate but you can't get scale. How can you get the best of both worlds? That's the big question our owners have put to us."

## Facing their own rebuild

The polytechnic sector was well advanced on its biggest change in a generation before the impact of COVID-19. Now the reform of New Zealand's vocational education sector, focused on the formation of Te Pūkenga as the national body taking in all ITPs as subsidiaries, is being rolled out against the backdrop of the disruption caused by the pandemic.

International enrolments in ITPs had increased by 70 per cent on an Equivalent Full-time Student (EFTS) basis between 2010 and 2017.<sup>20</sup> Most of the growth was in management and commerce and information technology, and came from India and China. Over the period all ITPs apart from Whitireia saw an increase in international EFTS and for some, such as NorthTec and Otago Polytechnic, the increase was six or seven-fold. For some, international tuition fees made up about 20 per cent of total revenue.

In 2019, ITPs earned \$178 million in tuition fees from international students. Te Pūkenga estimated that its international revenue would decline by \$110 million, or 65 per cent, from 2019 to 2021.<sup>21</sup> The challenge for Te Pūkenga and the sector to redesign its international approach while building a whole new operating model.

In the meantime, many ITPs are building transitional strategies which will likely feed into Te Pūkenga's approach.

<sup>20</sup> Overview of delivery in the ITP sector. [tec.govt.nz](http://tec.govt.nz)

<sup>21</sup> Briefing to the Incoming Minister. Te Pūkenga. November 2020.

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## Toi Ohomai

### Diversifying the strategy

Toi Ohomai is deploying a three-pronged strategy – retention and recruitment of international students currently in New Zealand; delivering online education to international students who have visas and hope to come to New Zealand to study when borders open; and developing offshore delivery options with partner providers in countries including China, India and the Philippines.

Like many institutions, Toi Ohomai is finding that the option of online delivery has been an important but shrinking component. It catered for more than 100 students in 2020, but expects about half of that in 2021 as students run out of options with continued border restrictions.

For Toi Ohomai, the offshore delivery component is more about generating revenue and building long-term relationships than immediate enrolments. So, it has put in place agreements with providers in China, for instance, to deliver foundational English studies for students who may then come to New Zealand for study in their third year.

At the same time, the ITP sector is investigating broader international linkages such as research collaboration and teacher exchanges when that becomes possible. For Toi Ohomai these initiatives represent a long-term shift in focus. Whereas pre-COVID-19 there were aggressive targets to recruit thousands of students from key markets, now the numbers expected are more modest, even after border restrictions are eased.

As Toi Ohomai's head of international Peter Richardson puts it, in the past 90 per cent of the international focus was about attracting students to New Zealand; in the future it is likely to be more 50:50 between onshore attraction and offshore deliver and collaboration, through ventures such as an agreement with Guangdong Polytechnic to deliver English and engineering programmes.

Before COVID-19, many ITPs were investigating offshore growth opportunities which may appear niche but could have huge scope. Toi Ohomai, for instance, had been looking at healthcare skill needs in New Zealand and found there was a big opportunity to offer some of their approaches in China. So it has been developing an aged healthcare diploma in Szechuan province.

Part of the programme is looking at potential synergies between Māori and Chinese approaches to care of the aged – an area that has been strengthened by New Zealand's success in handling the pandemic. At present delivery has to be online, offshore. In the future there may be a partial New Zealand component.

“Why would they choose New Zealand?” says Richardson. “Our offshore partners tell us New Zealand has done very well politically and health-wise, so that has strengthened our brand quite considerably. We think when the border does open, we'll have high quality students come here for part of their study. We can't compete on generic business qualifications, but we can develop niches such as aged care, early childhood education training, supply chain logistics and IT networking.”

The approvals landscape for such ventures is complex, including Te Pūkenga, NZQA and the Chinese government. But across ITPs, Te Pūkenga is working on rationalising the approaches, for instance through a cross-ITP working group and market investigation on the best delivery models for the China market in the future.

With pastoral care considerations, issues such as plagiarism, quality assurance and approvals from host government such as China, online delivery will be a complex, long-term and expensive approach.

Providers who have been increasing their online and blended activity have noted a range of issues they need to manage. These include handling a range of time zones for synchronous delivery of classes and tutorials, poor internet infrastructure in regions including Latin America and the Pacific and relatively high wage costs in New Zealand which make it hard to maintain a network of online tutors to work with students.

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## **Nelson Marlborough Institute of Technology**

### Opening online doors

NMIT moved quickly to apply for COVID-19 exemptions to deliver online. Like others, it saw online as a way to hold onto students. The demand has been lower than NMIT anticipated, in part reflecting hesitation among students about studying alone online. But NMIT does see growing scope for preparatory courses, including English language, to be delivered online in advance of planned study in New Zealand. It expects the demand for such course to grow considerably once there is more clarity about time frames for the easing of border restrictions.

NMIT's head of international development Will Tregidga believes there will be scope to apply the online lessons from COVID-19 to more permanent solutions: "I think online study of English language pathway programmes will be quite attractive for students to meet English language entry requirements, saving a semester of living costs. If they could do it online rather than living in New Zealand, there's a big cost saving for them – for example, it may be more attractive from a cost and convenience point of view to do it while living with mum and dad in Beijing.

Tregidga believes the same approach could have scope for a master's degree for instance, enabling an option to do the first 60 credits online and coming to New Zealand to complete the qualification. Studying in their home country online would have appeal to students who are already in employment and cannot take such a long time out for offshore study, he believes.

Sue Smart, NMIT's director of programmes and delivery, says the COVID-19 experience points to the potential for partial delivery online, supplemented with tutors – in NMIT's case operating out of a number of countries online – backing up the digital experience with in-person support, discussions and group work.

It is a model in transition. As Te Pūkenga becomes established, all approvals and accreditations will require Te Pūkenga endorsement before NZQA approval. That requirement will be essential to ensure quality and lack of duplication.

The aim is to develop a coherent international education strategy which at a minimum leverages the best of the subsidiary ITP approaches. It will also have the potential to present a coordinated New Zealand offering in a way that no other sector has so far been able to do.

Dr Linda Sissons, Chief Executive of UCOL, believes that ITPs under the Te Pūkenga umbrella will be able to use the platform of the new institution's scale to open up new international operations, but they will still have to define a unique New Zealand offering.

"If you're competing with the Khan Academy, Udemy or FutureLearn, why bother, unless there's something special about the New Zealand context?" Sissons believes an in-country New Zealand experience is likely to be an essential part of any future offering, even if a large component of any qualification is delivered online. As for the New Zealand component, Sissons points to New Zealand specialities including viticulture and fisheries, but she believes there are other elements such as indigenous studies, New Zealand ways of doing business and New Zealand educational practices which must be better defined and offered for international markets.

Tony Gray, Chief Executive of Ara, has been advising Te Pūkenga. He has similar cautions about the online approach alone. "What is the experience we are trying to give learners offshore and how does that in itself fit in what we are trying to do with Te Pūkenga?"

"If we are talking about significant development in the offshore online market, we need to be very clear what we are doing – we will be competing with significant offshore players and potentially there's a great danger that we would get trampled."

To develop its national strategy on international education, Te Pūkenga is looking to reset the international strategies currently being employed by individual ITPs and establish partnerships with Education New Zealand and G2G, the Crown entity established by New Zealand Trade and Enterprise to form international linkages based on New Zealand's public sector knowledge and expertise.

In addition to the overall proposition Te Pūkenga will develop internationally – including regional New Zealand areas of focus – the platforms to deliver to online markets will need to be addressed. At present ITPs and other providers use a broad range of platforms and portals, including Canvas, Blackboard and Moodle and the Open Polytechnic's iQualify platform which has developed for domestic 'distance' learning and is seen by some as a potential model to rationalise the offshore channel.

Te Pūkenga's current focus in 2021 is on developing its operating model, setting in place the way subsidiary ITPs will work within the overall organisation. Realistically, the international approach will follow from that.

Te Pūkenga has developed six broad priorities for its international approach:

**1**

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Develop and deliver high-quality vocational education and student support, in New Zealand and offshore.

**2**

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Help regions grow and thrive while staying connected to our local communities.

**3**

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Build a sustainable and innovative business model where value is economic, social and cultural.

**4**

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Help New Zealand learners, educators, industry and communities enhance their global citizenship and understand and embrace the benefits of international education.

**5**

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Integrate Māori knowledge and perspectives into how we think, work and grow.

**6**

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Develop a skilled, innovative and engaged vocational education workforce.<sup>22</sup>

Angela Beaton, the DCE for Delivery and Academic, says the approach will reflect the Government's focus on building value over volume and diversifying the market that New Zealand deals with. It will also include a focus on delivering to the Pacific, in line with the Government's focus.

Beaton sees the need for a coordinated and targeted portfolio of international vocational offerings, without duplication of programmes across campuses, along with common good practice standards identified in areas such as delivery channels assessment, quality assurance and marketing.

This will involve the addition of an additional step – Te Pūkenga endorsement – before NZQA processes approval and accreditation applications. Whilst some stakeholders expressed concern about additional complexity, most acknowledge it is a necessary step to reduce duplication and improve quality and strategic purpose.

The challenge for the future will be to ensure that the regulatory environment is agile enough to capture the opportunities of the future, while managing the risks.

<sup>22</sup> Mobilising for internationalisation in a new world. [tepukenza.ac.nz](http://tepukenza.ac.nz). December 2020.

# Wānanga

## Indigenising the academy

Although the numbers of international students coming to study in wānanga have been relatively small, New Zealand is becoming a significant world player in the growing area of indigenous studies.

Some institutions have developed partnerships focused on delivering short term visits and exchanges for students – including ‘study abroad’ students on semester exchanges from their home institutions in North America.

Such exchanges have been growing over the last decade but, like many initiatives, have been forced to look at digital alternatives in response to COVID-19 travel restrictions. AUT and the University of Maryland, for instance, recently hosted an online exchange for indigenous students and people of colour to exchange insights with Māori students.

“At a time when physical mobility is impossible, we continue to design virtual international experiences for our students that are meaningful,” said Dr Leeanne Dunsmore, director of Education Abroad at UMD. “These exchanges allow us to explore grand challenges in a global context. They also allow us to build relationships among people and nations, strengthening our ability to collaborate as we tackle challenges that transcend borders. Developing an understanding of another person’s lived experience is foundational to our work in international education. To see this happen in a virtual space, through these types of exchanges, is powerful.”<sup>23</sup>

Among New Zealand’s wānanga, Te Whare Wānanga o Awanuiārangi has been building relationships with colleges in North America delivering doctoral level study focused on indigenous knowledge and world views. One such relationship is with Evergreen College, in Washington State which currently has about 15 students, including the director of its native pathways, enrolled in the Wānanga o Awanuiārangi PhD programme. It is working with a similar, smaller cohort of PhD students in Maui, Hawaii.

The model for these programmes is not to bring the students to New Zealand but to deliver the education on their home ground.

“It’s important we are seen in the communities these students come from,” says the Wānanga CEO, Professor Wiremu Doherty. “Our relationship is primarily not with the institution, but with the community. Our students are primarily tribal based – they are nominated and sponsored by the tribe.” The approach, he says is a natural continuation of the principle the Wānanga has long established in New Zealand of working *kanui te kanui*.

Building on the relationships they have built up through the doctoral programme, the Wānanga has been endorsed in an MOU with the Affiliated Tribes of Northwest Indians, in Washington State. It has also been approached by the Kansas-based Haskell Indian Nations University, which described itself as the premier tribal university in the United States to form a partnership offering qualifications at tertiary levels including, potentially a co-delivered PhD.

23 “Virtual exchange connects Terps of color and Māori peers to talk global challenges, shared experiences,” Education Abroad, [globalmaryland.umd.edu](https://globalmaryland.umd.edu)

Progressing such arrangements has been largely put on hold due to COVID-19, but the Wānanga is working hard to maintain its offshore PhD students. Before COVID-19, the Wānanga's head of indigenous graduate studies Professor Mera Penehira visited the US frequently to support the programme but now the relationship has to work online. "We will continue to find creative ways of keeping our students engaged, like getting up at 3 a.m. for a Zoom meeting. We really have become part of these communities, and we have to work hard to keep that."

Doherty believes the approach is unique, where indigenous knowledge is delivered through a nationally credentialled programme. He believes the Wānanga's approach, focused on an authentic indigenous body of knowledge must be leveraged with the coherence and legitimacy that the NZQA credentialling can bring.

"These students have the wherewithal to go anywhere in the world and purchase an education. They've chosen little old Whakatane, where our home base is. The reason they've chosen us is that we are the only institution that delivers a truly indigenous PhD model. They see indigeneity reflected in all that we do. That doesn't happen anywhere else in the world."

Once COVID-19 travel restrictions are lifted, and true discussions are again possible, the Wānanga wants to explore more international linkages, which it believes have benefits for their New Zealand students as well.

"We have a very privileged line of sight around the research topics, the areas of study, and if you look past the accents, look past the geography, the fundamental issues are very similar [for indigenous people]. That gives our students in New Zealand a much wider view, and it also gives our international students, when they can come here, the ability to engage with our own students. Where else in the world would you hear this mix of indigenous languages being used, all working together. The relationships that will come out of that will make our communities all the stronger."

Doherty says there is interest from institutions in other countries in broader implications of incorporating indigenous knowledge into tertiary learning and adapting tertiary institutions to a "post-colonial environment." "They are interested in how we have done it in New Zealand, working with a central credentialling agency."

Penehira hopes it will be possible soon to bring together a professional PhD cohort if indigenous students focused on "indigenising the academy."

*// Imagine a dozen indigenous students from Washington State, Hawaii and Aotearoa working collaboratively in exploring all the implications of that, and making recommendations for government. That would be a huge contribution."*

# 6

## The school sector

### Uncertain about the future

International education in New Zealand is not just a tertiary issue. New Zealand is unusual among countries involved in international education in attracting relatively large numbers of international students to public, integrated and private schools. In 2019, before COVID-19, almost 24,000 international students enrolled in New Zealand primary, intermediate and secondary schools, paying \$201 million in tuition fees.

For many schools international students are a tiny part of their population, but for a number of schools the recruitment, revenue and pastoral care of international students are a significant part of their operation. State schools received \$20 million in the Government's recovery programme as temporary assistance to retain staff who had been funded by international tuition fees.

SIEBA, the Schools International Education Business Association, was formed five years ago with view to putting schools' international operations on a more professional footing.

Before COVID-19, SEIBA and some schools were lobbying for public schools to be allowed to deliver online, and to deliver NCEA subjects offshore which they currently cannot do.

SIEBA argues that while most New Zealand schools are not interested in online, offshore provision, a small number of New Zealand schools could make it work if they were able to develop a curated New Zealand online product. SIEBA argues it would be a niche product, but one that could be important to a group of schools, both for revenue and for bringing a global component to otherwise domestically focused schools.

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## Scots College

### A growing online experiment

The Wellington private school Scots College has pursued an international component for several years. With the arrival of COVID-19, some students who had applied but not arrived, and others who were visiting home countries, were stranded outside the border. Scots put together an online offering catering for about seven students. It was designed to keep a connection alive rather than deliver credentials. The experiment worked and Scots has begun 2021 with two teachers employed specifically to deliver online lessons to about 25 students.

Students study from their homes in China, Hong Kong, Thailand, Japan, Indonesia and other countries. Some centres such as Bangkok have enough local students to get together once a week for hub activities. To deliver synchronous, real-time learning, classes begin in the afternoons, New Zealand time. The focus is still not on formal credentials but on the Global Competence Certificate, a programme put together by Massey University and AFS.

Scots College believes the programme could grow to cater for up to 100 students, possibly as a white-labelled service which other schools could resell as part of their own recruitment efforts.

Across the school sector, there is considerable uncertainty about the future role of international education. Schools have not been included in the cohorts for short-term entry of students into New Zealand – in part reflecting pastoral care complexities with quarantining. Some are wondering if they will ever rebuild to past levels of activity.

Unlike other parts of the sector, schools do not have options such as research collaboration, staff exchanges or fully blended modes of delivery to diversify away from their reliance on student recruitment into New Zealand.

Some schools, however, are investigating new digital tools from third party sources to improve the effectiveness of marketing, recruitment and enrolment process. Some say they no longer have the staff, infrastructure or scale to operate how they were in the pre-COVID-19 environment. They also expect that recruitment will become more competitive as other countries increasingly gear up for the post-COVID-19 rebuild.

# 7 Platforms and pathways for online delivery

Among providers who are exploring online and blended delivery, there is a growing range of options for designing and delivering digital content. Some of the options change the nature of the relationship between the provider and the learner and will raise questions about quality, assessment and the nature of the learner experience.

Some providers responded to COVID-19 by rapidly putting content including presentations and videos of lectures online.

Many have experience with a range of third-party services and portals which they have been using for online domestic learning and which they have looked to extend offshore.

Many use a proprietary learning management system, such as Blackboard and Moodle, sometimes in conjunction with their own platforms. Some have looked to enter partnerships with online digital learning platforms such as the UK-founded FutureLearn, which originated out of the Open University, or the US-based Coursera.

Some commentators believe the digital impetus created by COVID-19 will finally see such MOOC (Massive Open Online Course) providers finally deliver on the hype that has surrounded them for more than a decade.<sup>24</sup>

In New Zealand while some are looking at those platforms to deliver online, at the other end of the spectrum some small local providers such as Le Cordon Bleu New Zealand have co-opted the online resources of parent companies as an alternative for students unable to enter the country for study.

In New Zealand, iQualify and eCampus NZ both have strong track records of domestic online learning, or distance education as it was commonly referred to in the past. They are both looking at what aspects of their business models might have international applications for a range of New Zealand providers.

iQualify, which grew out of the long history of distance learning pioneered by the Open Polytechnic is to date strongly focused on domestic learners. The relatively small number offshore learners it caters to are largely expatriate New Zealanders. CEO Caroline Seelig believes larger scale offshore delivery would depend on network of local partners where students could supplement their online learning with face-to-face experience.

<sup>24</sup> Chris Impey, "Massive online open courses see exponential growth during COVID-19 pandemic," [theconversation.com](https://theconversation.com), 23 July 2020.

The Open Polytechnic is now focused on developing white-labelled options through iQualify in areas such as business studies or nursing for other New Zealand TEOs which would deliver the content under their own branding and supplement learning with a network of offshore agents supporting the initiative with services such recruitment, tuition and pastoral care. Seelig believes such a model could be a transitional phase before students enter New Zealand to finish their studies. She is hopeful that the advent of Te Pūkenga will bring more cohesion across the sector.

Similarly, eCampusNZ, which is the trading name of TANZ eCampus, was developed by a consortium of ITPs. Like iQualify, its focus has been domestic, and it is looking at a business model which would see offering its infrastructure to support New Zealand education providers build their international networks.

In the Government's Strategic Recovery Plan, ENZ received funding to help develop more diversified markets and channels to delivery. The first initiative under that programme is a partnership between United Kingdom universities consortium NCUK, ENZ and all eight New Zealand universities to allow students to begin their studies offshore with the expectation that they will complete them in New Zealand after borders open. The initiative will be open to students from more than 30 countries to enrol at centres operated by NCUK to begin study towards sub-degree, degree and masters programmes. It is expected to cater for about 1,800 international students by 2026.

While the initiative has begun with universities, ENZ is exploring extending the concept to other New Zealand providers including ITPs and PTEs.

ENZ is also looking at the development of offshore New Zealand centres across Asia and the Middle East, where students might undertake foundation level studies, if not a full New Zealand qualification, in the context of a cross-agency New Zealand information and marketing centre. It is currently calling for expressions of interest from institutions looking to be involved in the centres, and to other government agencies who might use them for broader New Zealand promotion.

Another ENZ project is a pilot of a New Zealand-branded suite of learning tasters on the FutureLearn platform where students could sample non-credentialed offerings from a range of New Zealand providers. That is a path that many international institutions are pursuing aggressively.

As options such as these become more common, they are posing new questions for regulators and providers: How is the quality of the New Zealand brand being assured; how can educational quality be assessed? How can the equivalence of any qualifications gained through such channels be assessed in a meaningful way? Who is the prime owner of the relationship with the learner; where does the onus lie regarding and assumptions about any subsequent study or work within New Zealand?

Just as travel in the post-COVID-19 world will require weighing up new levels of risk and deciding what is acceptable, in international education, the risks and opportunities are shifting markedly. The regulatory framework will need to shift to match these opportunities and risks.

# Appendix

## Key interviews and engagements

NZQA extends its thanks to the following people who were interviewed during the development of this report, and to those who provided additional feedback:

- Will Tregidga, Sue Smart, Nelson Marlborough Institute of Technology
- Darryn Melrose, Ruth Cooper, Media Design School
- Martin Carroll, Manukau Institute of Technology
- Peter Richardson, Toi Ohomai
- Wiremu Doherty, Mera Penehira, Te Whare Wānanga o Awanuiārangi
- Kim Renner, Darren Conway, English New Zealand
- Caroline Seelig, Open Polytechnic
- Craig Musson, Wayne Dyer, Independent Tertiary Education New Zealand (ITENZ)
- Dr Angela Beaton, Te Pūkenga
- Tony Gray, Ara
- Chris Collins, Eastern Institute of Technology
- Dr Nitesh Sughnani, Knowledge and Human Development Authority, UAE
- Qaiser Rashid, Talent International Institute
- Jenny Jenkins, Cordon Bleu International
- Dr Linda Sissons, UCOL
- Morwenna Shahani, Navitas, University of Canterbury International College
- Guy Pascoe, Scots College
- John van der Zwan, Schools International Education Business Association
- Frances Valintine, TechFuturesLab, The Mindlab NZ
- Brett Berquist, University of Auckland
- Brijesh Sethi, Tommy Honey, (Honey Consulting, interim establishment board, Creative, Cultural, Recreation and Technology WDC) Quality Tertiary Institutions (QTI) – Nga Wānanga Kounga
- Wendy Liao, Mary Waugh, New Zealand Skills & Education Group
- Sam Alavi, Future Skills Academy
- Ewen Mackenzie-Bowie, ICL Graduate Business School
- Dean McCallum, James Cunningham, Pacific International Hotel Management School
- Pamela Simpson, John West, eCampus NZ

In addition to these interviews, there has been engagement via:

- ENZ Recovery Plan Engagement Workshop – representatives of government agencies with a role in international education.
- ENZ/INZ Peak Body Forum – cross sector meeting of international education peak bodies.
- Informal consultations with Education New Zealand, Ministry of Education, Tertiary Education Commission.



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