

Minutes

MEETING	South Asia Commercial Development Group	
VENUE	Education New Zealand Boardroom Level 6, 138 The Terrace, Wellington	
DATE & TIME	27 July 2007 10:00am – 14:30pm	
ATTENDEES	Bruce Osborne Margaret Pierson Susan McAllister Tricia Reade Wayne Angus Brett Muir (for SQ) Ian Stockwell Stuart Boag Ben Hodges	UCOL CPIT Design & Arts College MIT Otago University Waikato University NZTE ENZ - Chair ENZ
APOLOGIES	Shane Quick (SQ) Sarah Cornish	Waikato University ENZ

1. Confirmation of minutes from SACDeG meeting of 19 December 2006

The minutes from the previous meeting were confirmed and carried by the group.

Upon reviewing action points from the previous meeting, the following action points were discussed:

Market Intelligence

The group were particularly interested in what progress had been made with ENZ coordinating the central collection of visa and course link data for Indian students.

Some anecdotal evidence that there is a trend towards Indian students moving to shorter courses such as 1 year diploma courses but need the hard data to confirm this.

ENZ explained they had approached INZ concerning data capture and was told that INZ staff have difficulty interpreting/capturing what courses students have applied to.

ACTION POINT:

1. Tricia to raise issue with David Cunliffe when she meets with him next week

The group agreed that if SACDeG is to act as an effective strategy advisory group, if it is to be able to identify risks and opportunities in south Asia, it needs to be able to assess, extrapolate and interpret hard market intelligence.

In relation to the uncompleted ENZ action point from the December 06 SACDeG meeting, the group reiterated the urgency of this action point- the group had advised ENZ that they should routinely capture market data, analysis, and the group encouraged ENZ to present such findings prior to the next SACDeG meeting for strategic consideration. SACDeG recommended ENZ liaise with INZ and Statistics New Zealand.

Concerning this, ENZ explained that they have noted an appetite in the industry for Indian student outcome research, and would be happy to undertake this. Such research would help identify if there are reputational risks to the industry akin to the Chinese Student Crisis of the early 00s. ENZ reiterated that without hard statistics fears that students are moving to shorter lower quality courses as a pragmatic path to immigration may be unwarranted. Furthermore, if students are *happy* with immigration per se as an outcome then the risk to reputation is minimal. Regardless, ENZ will pursue this research. SACDeG endorses this.

As a conclusion to these issues, ENZ was able to present statistics concerning the 2005 and 2006 intakes per tertiary institution for Indian students. The statistics showed a general increase in student numbers across the tertiary sector, and provide an objective assessment of progress.

ACTION POINTS:

1. ENZ to centralise and interpret Indian student data.
2. ENZ to draw up Indian student outcomes research.

Discussion followed about INZ inconsistencies around student visa and PR status issuing and fears of INZ closing up working opportunities for Indian students/graduates.

Professional Development for PTEs in the India Market

SACDeG questioned what progress had been made on developing a PTE PD programme. ENZ have given it much consideration and have come to the opinion that, of the PTEs involved in India, half don't need professional development and the other half probably don't want it. It was suggested that something could be done at the ENZ conference. However ENZ explained that those that may find it useful were not attending the conference. On balance ENZ believes the idea is not feasible.

ACTION POINT:

1. ENZ to discuss with NZTE - India

Virtual Fairs

ENZ reported that feedback from NZTE India was that Virtual fairs were not ideal for the Indian Market. SACDeG hoped that NZIER agents would be consulted

ACTION POINT:

1. NZTE to consult with NZIER Agents regarding viability of Virtual Fairs.

Capturing of visitor data at fair series

ENZ explained that whilst a little door data had come through from the April fairs, it had provided no fresh insight, i.e. the data received so far has reiterated the efficacy of newspaper advertising in Cochin and Delhi.



Formalising Agent Group Meetings

ENZ explained that the IOG had discussed the format of these post/pre fair meetings and had agreed on a two part structure incorporating informal cocktails and formal round table discussions, however no further detail emerged from the IOG group.

ACTION POINT:

ENZ to tease out nature/format of such meetings prior to September fairs with NZTE - India and NZIER.

2. Feedback from April Fairs - IOG paper/minutes. Fair Participation Criteria

The group discussed the IOG's proposed fair participation criteria for institutions. ENZ explained that if any criteria are to be enforced they need to be transparent and applicable to all. SACDeG felt that the IOG's suggestions were problematic for a number of reasons. Primarily though, it was felt the criteria were anti-competitive and ultimately unnecessary as the main problem of foreign courses/campuses being promoted within the fair by a sole provider had been addressed. SACDeG were happy to stick with a one year NZQAB audit cycle as the only strictly enforceable criteria.

The group noted that if ENZ is able to centralise useful market intelligence for dissemination to the industry the fairs will largely self regulate anyway – the industry will be regulated by market demands.

The group further noted that the IOG should be given the statistics presented earlier in the meeting which shows the industry is enjoying a period of steady growth. IOG are to be encouraged to view the situation collegially – there is room in the market for everyone. In conclusion SACDeG opted for the status quo with the additional requirement that only New Zealand as a study destination can be overtly promoted.

ACTION POINT:

1. ENZ to relate SACDeG and ENZ's opinion to IOG

Discussion was held around the practice of some institutions having a agency representative at their booth. The group were divided as to whether this was an acceptable practice or not. Those that supported the practice said that it allowed those with limited staffing to have an extra person to help manage student interest. Those against the practice felt it would disadvantage agencies without adequate staff numbers to sit in booths they consider strategically important.

They also felt most agencies would want to have agents at certain institution booths, which would not be feasible and would create conflict. Meanwhile, other institutions may not be able to attract any agency interest at all, which would put them at a perceived disadvantage to other institutions attending- giving the fairs (and therefore ENZ generic funding) an unfair slant.

The group felt it appropriate to ask what the NZIER thoughts were on the issue. Some in the group felt that providing advice on this issue was beyond the groups mandate as it directly impacted on institutions individual marketing operations.

ACTION POINT:

1. ENZ to ask NZTE India to discuss Agent presence at fairs with NZIER.

NB: According to guidelines given to NZIER members prior to April series of fairs it is permissible to have up to 3 staff + additional staff if additional staff sit in institutional booths.

Regardless of the outcome of this debate the group agreed that institutions should be allowed to get assistance from alumni.



3. Depth Strategy 2007-8

SACDeG agreed that fairs needed to continue in the coming year. However, they felt ENZ needed to make the fairs a positioning tool in support of a broader generic media campaign, rather than the main driver or focus.

The group encouraged ENZ to devote more of the depth strategy generating editorial coverage which promotes New Zealand as a study destination. SACDeG suggested that the focus of media releases should include, for example: profiles of Indian New Zealand educated students forging successful careers in New Zealand, back in India, or elsewhere; New Zealand's educational successes (e.g. University of Canterbury's super computer); and New Zealand's successes in general (New Zealanders or New Zealand companies, institutions taking on the world)

The group indicated that NZTE would be a good source for NZ success stories. NZTE noted their website showcased an excellent range of NZ success stories which could be utilised as part of any media campaign.

ENZ explained that similar ideas had already been presented to the PRG but dedicated funding had not been recommended. However ENZ agreed that SACDeG's suggestions were the way forward for generic depth promotion.

ENZ will contact Ogilvy – India and NZTE about developing a media relations campaign. ENZ hopes to utilise materials/profiles sourced by institutions Communications Departments. SACDeG recommended that institutions International departments should also be liaised with.

SACDeG also felt ongoing newspaper and outdoors promotion was needed in support of the fairs. ENZ noted that outdoor advertising was relatively cheap in comparison to newspaper advertising, although Newspaper advertising was the most effective medium in most fair cities. ENZ explained that the supplementary government funding enjoyed for the last financial year will not be available. With a contracted budget and a need for a wider media strategy, ENZ will not be able to sustain current levels of fair promotion via newspaper.

The group agreed that the strategy and rationale needed to be announced/documentated for the industry and the IOG. So that institutions' individual media engagements would be on-message / on-strategy. It was also indicated that a documented PR manifesto in conjunction with regular market intelligence (as discussed previously in the meeting) would provide SACDeG with greater clarity of purpose and efficacy.

ACTION POINT:

1. ENZ to develop media campaign as a more significant component of the depth market strategy.
2. NZTE to provide ENZ with details of NZ success stories for use in media campaign.

NZTE added that they will be happy to provide their communications staff with similar media objectives.

ENZ went on to explain that with a contracted budget, consideration will need to be given to the fair programme in general. Will fairs become more aligned to a pure user pays model? Will the number of fairs be reduced? Will ENZ consolidate subsidised fairs and provide support for the development of fairs/events generated by industry clusters?

4. NZIER – new members and ongoing criteria

ENZ clarified NZIER membership and sought SACDeG's comment. ENZ explained



As of 1 March 07 NZIER agents were those that met the required student numbers and had an 80% approval rate. Assessment is based on accumulated totals over the last two reporting periods (ie a 12 month time period).

Subsequently, and for all out-years, these NZIER agencies with accumulated student numbers below the student number target or under the 80% approval rate as of each 6 monthly assessment (assessments dated 1 September and 1 March) will be put "on notice". Should an agency then fail the following 6 month assessment (2 failed assessments in a row), the agency will be excluded from the NZIER group.

Entry (or re-entry) to the NZIER group is restricted until such time as an agency is shown to have achieved membership criteria as of a 6 monthly assessment.

NZIER membership status regardless of when it is issued is issued for a calendar year. Current member agencies therefore have a 2007 membership. Each calendar year membership period has a 2 month overhang to accommodate the gap between the end of the year and the 1 March assessment date. If a member is excluded in September for a second failure their membership status is withdrawn- effective immediately.

After maintaining a membership for a 12 month period, members are expected to better their student approval rates. Percentage approval rate criteria are therefore raised from 80% to 85%. The 85% rate for second year members must be achieved at each 6 monthly assessment or the notice then exclusion system will apply.

On the basis of the March 07 figures provided by NZTE Delhi, Marconis and Gateway have met the relevant numeric criteria. It was noted that SSS Consultants were near the generic criteria

It was also noted that, Campus International, Education Overseas Consultants, and Veniblos would be individually advised as to the ongoing criteria.

SACDeG endorsed these criteria.

Mention was made of the wording to the NZIER Code of Conduct. SACDeG recommended it be updated to be more aspiring rather than dictatorial.

ACTION POINTS:

1. ENZ to document and provide NZTE – India for consultation with NZIER.
2. ENZ to redraft code of conduct.

5. Other business

Discussion was held around the creation of a business development programme for NZIER agents. SACDeG see such a programme as one way possible to safeguard against a market slumps.. If agencies are trained in effective business techniques and models the Indian market should become more sustainable. Such topics could include building incentive schemes developing quality systems, training programmes ethical approaches etc.

SACDeG encouraged ENZ to explore developing separate professional development programmes for both counsellors and the executive level of agencies. SACDeG advise that ENZ should get feedback/input about the concept and content from NZTE India and the NZIER. However some in the group stated that time may be better spent with agencies identifying and removing the "roadblocks" New Zealand's governmental and tertiary institutions are placing in the way of ease of business. Both concepts are in agreement that it is incumbent on New Zealand to help NZIER agencies attain and maintenance NZIER criteria.



ACTION POINT:

1. ENZ to explore concept with NZIER – India

There was discussion around the terms of reference and appointment process to the advisory committees. ENZ indicated that they were invited advisory groups, as opposed to the more structured sector representative reference groups.

ACTION POINT:

2. ENZ to circulate the ToR and process for the SACDeG 07/08

The group recommended that ENZ circulate a summary of this meeting and its goals to be circulated via ENZ's e-news.

ACTION POINT:

3. ENZ to send summary in E-news post conference

>Meeting Closed<

