

Minutes

South Asia Commercial Development Group

10am – 2pm, Tuesday 19th December 2006

ENZ Boardroom, L 6 138 The Terrace, Wellington

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| Attendees | Maureen Manson | CPIT |
| | Tricia Reade | MIT |
| | Wayne Angus | Otago University |
| | Ian Stockwell | NZTE |
| | Bruce Osborne | UCOL |
| | Susan McAllister | Design & Arts College |
| | Shane Quick | The University of Waikato |
| | Stuart Boag | ENZ - Chair |
| | Sarah Cornish | ENZ |
| | Laurette Farr | ENZ |
| | Marie Sullivan | INZ (morning only) |
| | Simon Smith | INZ (morning only) |
| | Kerry Grieg | INZ (morning only) |

1. Update from INZ

Indian statistics summary, showing increase in NZ figures of 32% year to date, handout provided, 45% low risk and processed within 5 days. Australia has seen 90% increase year to date, have had most dramatic change.

Request for breakdown on length of courses, Kerry able to soon provide. These stats will provide interesting information in relation to the recent INZ request for submissions commenting on upcoming policy review.

Agents and institutions would prefer to have similar change of visa restriction policy to Australia.

Canadian NZer keen to work with NZ institutes to set up education based in India (a JV?), at trade levels e.g. trade labouring but potentially also degree level study, Kerry has contact details.

Discussion of possibility of e-channels for Indian applications; similar to the Australian e-system which seems to be working well at 65%ish of applications. This is on INZ work programme, but will still be a while away, business models, policy, cabinet, expense etc difficulties.

Discussion to clarify whether there is an English Language market in India, Australia have fair ELS statistics, however INZ say that these students going to Australia are either from a poor economic region (and wouldn't get a NZ visa) or are then converting to same institution academic programme. Definitely no visa for stand alone English course from INZ point of view. Seems few ELP visiting the market recently, no visits to INZ Delhi recently.

A market shift, highly qualified students are returning to India now and are finding good jobs/careers. 15% rise in salaries in India recently. NZ not competitive now in regards to post study employment. An increasing trend has been noticed of Indian students keen to return after their studies. This potentially impacts on NZ marketing campaign, which in the past has been targeted towards 'study for immigration'; we now have to consider the 'study for returning to India' trend. An issue related to this is that the majority of Indian students think that their NZ qualifications wouldn't be recognised back in India. A priority for the new MoE Councillor (Perya Short, due in India in April)

PTEs sometimes unhappy with INZ Delhi due to non-issuing of visas, however students will collect many Offer of Place letters and don't necessarily choose NZ and apply to INZ. So these are not necessarily declines, but may be a case of no application lodged.

ENZ enquired about any further recommendations for the market from INZ, INZ happy with work at the moment, working together and 'keep doing what you're doing' keep looking for quality applications. Keep strong communication going.

New comers to the Indian market need more assistance, need more support from ENZ/experienced marketers. Should talk to INZ as well as getting briefing from ENZ/marketers if going to a fair. Some not planning to attend PACE fairs because of expense, but still need help. Possibility of having a session at Conference – India 101 with the visiting agent (Liz Batra) and Strategy group person and IOG person or a Roadshow/PD session specifically inviting the new PTEs? How to help/warn those that don't take part in any collective marketing activities (e.g. PACE fair, Conference etc). Also a concern that students going to the newer PTEs in the recent large growth are not receiving good outcomes when they come to their course in NZ, an ongoing issue.

Two secondary schools have recently visited the market, apparently only 22 Indian secondary students are studying in UK, USA and NZ total. Possibly NZers are trying out India because of closing markets elsewhere (e.g. China). This is not recommended by INZ as India is not a market for the secondary sector as the above figures show.

INZ stats showing Indian students by institution at 1st November were tabled by ENZ. Regional stats are not currently captured by INZ, group seeking this to help with choosing cities for fair/promotions. This is currently not available from INZ data. The best way to collect student regional data might be directly from the active unis and ITPs etc, this could be possible but maybe not able from PTEs? This would need to be centrally organised from ENZ.

Request that an ENZ journalist type person could collect these stats from industry and also collect agent stats and student stories for profiling/marketing? Regarding the stories, as Clemengers have done in the past, not asking institutions to provide stories, but a journalist travel around NZ doing one on one student interviews/photos.

Some agents not happy with universities' turn around time on applications/paying commissions etc, universities becoming less favourable with agents. Other sectors are paying commission up front etc.

To note, not specific to India: Health related courses (rest home care), there are labour shortages in NZ but they are caused by the industry paying low wages. This is not an area of shortage of NZ workers. If the terms and conditions were amended there would be NZers available for that work. Not recommended for institutions to be promoting those types of courses as no/less demand for

employment in NZ. Healthcare Assistant course, the minimum wage is the impact here.

Action Points:

- I. Kerry to provide course length stats to Stu for dissemination
- II. Kerry to provide Canadian contact details to Stu for dissemination
- III. ENZ to create a briefing document for those new to fairs, and put them in touch with experienced people, let them know that INZ also happy to meet with them to discuss their expectations/experience
- IV. Invitation/organisation of India 101 (as a PD session?) for the 21 PTEs on the student stats list. Some members of this group to attend in a leadership role. ENZ action this point.
- V. ENZ - Centrally coordinated data collection and PR (student profiles)

2. Update from NZTE

Sri Lanka is a diversification market for NZTE, as at 30 June 2007 this promotion from NZTE will cease, and Sri Lanka will move into the PACE national marketing programme.

Sri Lanka reasonable numbers flowing through INZ, there was high interest at the last Sri Lankan fairs, and good agents there too.

Bangladesh, not large numbers coming through. MIT have been active here but with no progress. Very few applications going to INZ. PINZ have a large project going on in Bangladesh.

INZ would be nervous about any institution seeking students from Nepal.

3. NZIER Agents Group discussion

Recent meeting minutes tabled.

Promotional Activities

Strong consensus on wanting to follow the agents' advice as per minutes

Less on newspapers, more on outside banners and multiplexes

Virtual Fairs – online advertising – would this be a possibility in India for generic NZ profiling?

Bus advertising for the route to universities supported

Total budget for the 3 cities estimated to be approximately NZ\$150,000

INZ now charging 50% for INZ staff travel costs for September fairs, April fairs, Agents Seminar, cost goes into ENZ budget.

Agent meetings, are they structured enough, are we collecting the information we want, are we capturing the comments from the correct staff members in the company – at the right levels. People aren't focussed right before a fair as they're busy setting up. Could it go into Code of Ethics to send counsellors to these meetings? Agents meeting the day before the 2 big fairs, afternoon meeting followed by refreshments? Need leadership and more facilitation – Kerry and Paul? B group could be invited to this session/training/workshop if it were the day before. This helps them to lift their game.

Criteria for Entry

Agents keen to double the numbers required, suits all the agents currently in the group, would come into affect 31st March. New agents could still join the group at the end of this year. Perhaps confusion between entry and maintenance criteria. Entry criteria will be 80% and 85% for maintenance (potential review to go up to 90% for September). Group comfortable regarding doubling the numbers. The dates stay as set, in at March, with September review Should be put in writing that A group are now on the INZ 'fast track'

Discussion of new NZ/India based Agent from Ian, work to current targets. He'll be picked up to join in March, he has 9 approvals so could be OK. Have to stay fair to new agents, only needs to meet current criteria. Should be annual review. Feedback points are clear – Sept and March, but entry points still aren't clear. Needs to fit in with the training plan. Covers Indian nationals processed from the New Delhi INZ branch. They are Indian based students only; this point needs to be captured in the document. INZ have lawyer who could look at this. Exit point warning at 6 months, exit group after 12 months. Entry point 31st March means in group from 1st April, once in stay in the group for year period. Exit after their own 12 month period, whether joined at March or September. ENZ to advise Paul as Chair of NZIER to write to new members on an NZIER letterhead (using NZIER logo) in April (based on 31st March stats). Terms of Reference as well as a Code of Conduct/Ethics required.

Terms of Reference/Code of Ethics doc for NZIER Agents

To be called a Code rather than a contract. Points 1 and 2 could be reworded into an introductory paragraph.

Dates of joining/leaving the group etc, more detail around that to be included.

Discussion for exit of group (fights etc) can be done up in India, copying the AERI model. ENZ to manage the progress of this document. Give the NZIER group responsibility to put together and self manage. Aim for a close to final document by next meeting (April?). Need to continue strong NZTE/INZ in country involvement in group.

Institutions have tight wording in their own institution-agent contracts, so these additional terms are for the NZIER group to be involved in. Also need a thorough foreword on benefits, so more on advantages rather than "you will not". So ENZ will write a benefits and guidelines of being an A group, then Code is written with conduct required and NZIER group will ratify e.g. terminations and so on.

Aviation Training in India (Ian)

Specifically flight training issue, opportunity for NZ. Studying theory in India, flight training in NZ. Demand for pilots in India. Waiting for comments back from the group, tied up with restructuring of the association. Update in February.

Fair Participation

Branch should only attend if agent is sending students from that area.

Sometimes get more agents at fairs than participating NZers

Too complicated to enforce rules for 2007, attending the fairs can be good training for some agents. Status quo will remain.

Agent Commissions

INZ policy (re waka jumping) is still under review from 2 years ago, it's still an open subject.

ITPs have amended their refund policy, unis receive fees on a semester basis and will refund if leave, PTE have to refund under the Education Act. Agents may not understand that the students may withdraw in second semester which is why agents don't receive commission. Ask agents to provide case studies of actual incidences to ENZ so details can be given to INZ.

Airline / Commercial participation

Invite Star Alliance? Singapore/Malay/Thai if they're interested in this? In the past Qantas paid \$3,000 ish to be at the fair

Certificate

Yes, can provide a top performing Certificate for agent and also for 04/05 Geebees, 05/06 Liz Batra. Not sure about trophy, yes can revive this if we can find it. Jugnu, do you know where the trophy currently is?

September Fairs

Preference for smaller number of cities. Perhaps seminars in smaller cities, e.g by NZTE or agents & institutions. 6 city draft timetable email from Jugnu tabled (Delhi, Chand, Chennai, Hyder, Mumbai, Bang 2 – 11 Sept) all one day fairs. Happy with this list for PACE, still Kolkata with a question mark. ENZ to query with Jugnu/IOG

Few students from Hyderabad, is it worth having a fair there? Which agents want a Saturday fair there? Rationale for this? Saturday is best day? Why not Bangalore? Sunday is fine for Mumbai

Money wise would rather not spend on fair in Kolkata

One day/two day split for big cities? Not sure, think one day would work.

Should do some generic promotions in Gujarat as there are no fairs, around the time of the fairs as NZers will be there then. Possibly around Lucknow (Punjab)?

Action Points:

- I. ENZ to prepare document regarding Virtual Fairs, for agents to discuss, to give to Kerry to take to March NZIER agent meeting.
- II. Electronic data entry at the door at fairs in April to send
- III. ENZ to work on formalising the group meetings for Kerry and Paul
- IV. ENZ to email out draft documents to group for comment by 20th January 2007.
- V. ENZ to email out current IOG draft "contract" for comment as per above.
- VI. ENZ to ask agents for specific examples of institution swapping
- VII. ENZ to quickly get September dates and cities confirmed.
- VIII. ENZ to ensure generic promotions in Gujarat are undertaken at an appropriate time

4. Student Profiling

Want more work done in this area, story generation. The original Clemenger interview stories were really good.

Really successful students out there, for all markets.

Mentioned the search for stories as part of the brand evolution.

Still a lot of extra work required. Some suggested a university intern, and also have stories about NZ students too (due to their NZ Education)

Action Point:

ENZ to do more work here, and keep stories current.

Consider a Maureen replacement, ENZ to consider and action.

Thank you Maureen for your contribution to the SACDeG, very much appreciated and best wishes for your exciting times ahead.

Meeting closed 2.30pm