

8 MARCH 2022

## ETS GLOBAL CAMPAIGN ITALY KICK-OFF MEETING MINUTES

Date:	08.03.2022
Time:	15:00 - 16:00 CET
Participants:	ETS Global Italy: Tamara BABAIAN, Manila CAMPISI, Gerben VAN LENT
	European Diplomats: Daniela ABENTUNG, Anton LAMMERS, Alia MOLOVA, Anoushaey SAIF, Alistair STARLING, Noé UIJTERWAAL

### Roles

#### ETS Global

Gerben VAN LENT

Tamara BABAIAN

Manila CAMPISI

Vice Managing Director (Amsterdam)

Director Business Growth and Channel Management (Paris)

External Consultant (Milan)

#### European Diplomats

Alistair STARLING

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Project Leader (Berlin/Tallinn)

Principal Consultant (Brussels)

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## 1. Current Situation (as is) evaluation

### Contacts and Partnerships

- Plans to open up an office in Italy (Milan) to establish presence as part of their new key strategy in Italy, probably in summer/autumn 2022
- US Embassy used for event planning, reaching out to the Ministry of Education, but no utilisation of connections and partnerships
- Partnership with Arnoldo Mondadori Editore – the largest publishing company in Italy, however, the partnership ceased
- Interested in partnerships with trade associations (such as Confindustria, Associations for Architects/Designers etc.)

### Target Groups

- Italian schools: 6-11y, K-12, International schools, Vocational schools, Architectural and Fashion schools
- Higher Education institutions
- Government
- Corporations

### Products, Running Campaigns, Initiatives

- TOEFL
- TOEIC
- TOEFL IBT

### Other external data

- PNRR [Piano Nazionale di Ripresa e Resilienza (National Recovery and Resilience Plan)] – significant investment for a reform of the Italian education system

### Other internal data

- New ETS Global Italy office will start operations on 1<sup>st</sup> April 2022 with a new country manager Serena Pegoraro
- Have not had success in selling tests to the health sector (partially due to Covid-19 lockdown)

### Core strengths/assets

- Relationship with Polytechnical University Milan

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## Opportunities

- Allocation of RNPP fund in Italian schools, aiming to support projects in public administration
- Potential for growth of TOEFL IBT – triple the amount of TOEFL IBT tests in the next 5 years (comparatively to IELTS)
- Potential for tenders
- Schools choose which certification they offer to students
- New country manager
- Presence in Italy
- Rely on distributors to provide online courses
- Plans to enter the corporate segment, develop professional associations and receive funds to train corporate employees, architects, designers etc

## Red flags and threats

- Little access to government institutions and officials who hold the decision-making power
- Little access to European funds
- EU allocates funds via agencies in Italy, so there seems to be no direct access. Here, funds seem to be allocated by local agencies and it is a challenge to overcome this barrier
- Under-investment in English language skills in Italy (excluding Milan)

## Weaknesses

- No government contacts

## Marketplace Competitors

- Cambridge (well established competitor which currently dominates the market)

## Notes on other markets

- Successful projects in Poland

## 2. Desired outcomes (to be)

## Business Development Objectives

- Increase visibility and brand awareness on a governmental level, specifically for TOEIC
- Identify and approach key people in the government relating to fund allocation and establish a connection with these government officials.
- Triple the amount of demand for TOEFL vs IELTS

## 3. Review Timeline, service description and approach

- First report: End of March/beginning of April

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- The second report will be more profound and broader
- Service description as specified
- Clear commitment to coordinate closely, info sharing is critical before taking action
- Undertake holistic market study, add new aspects, new spin to existing business strategy for Italy

#### **4. Review budget allocation**

- Budget goes mainly to DE, IT, FR (BR exploratory), flexible approach

#### **5. Next steps**

- Next meeting scheduled for 22 March