

ASSOCIATION NAME: **TEAG**

COUNTRY: **Turkey**

National Report for FELCA AGM – 2011

AGENTS &Associations

What is the total number of agents operating in your country?

Although is no official number, but we estimate it to be around 300 legally established

How many agencies are members of your association?

20

Market Growth/Decline

Please include information regarding trends in student numbers and student nationalities.

If information is available or if you can estimate, please provide the following, for **both** your association and all of your country:

Estimated, as official numbers are not available.

Association Total from country

total number of language students in 2010 **around 40.000**

total number of language student weeks in 2010

total number of high school and university students **around 20.000**

top 5 destinations in 2010 and % of the market of each

Destination % of your students

1 **UK 35 %**

2 **United States 30%**

3 **Germany 10 %**

4 **Canada 5%**

5 **Other (Australia, Malta, Russia, Poland, Ukraine etc.)**

Visa regime – any new difficulties?

US visa procedures remained unchanged in 2010

UK visa system is still far from being in good shape. Despite all efforts to streamline the process there are still grey areas that causes problem

Canadian visa officials approach to Turkish students are more positive than last year.

Having said that the fact that visa officials' discretions still paly vital role in visa issues rather than tangible criteria's

Government Relations – any developments with your or other governments?

Other key issues for the industry?

2011 has been a good year camper to 2010 however last two months has seen a slow down because of economic climate in Europe

Initiatives/Developments for your association?

Further fragmentation has accrued as far as association are concerned. Many believe this fragmentation has been encouraged by FELCA's decision to accept second association from one country.