

ASSOCIATION NAME: **ASEPROCE**

COUNTRY: **SPAIN**

National Report for FELCA AGM – 2011

AGENTS & Associations

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

There is no official number, but we calculate there are around 100 legally established agencies, exclusively dedicated to this activity, as our members do.

How many agencies are members of your association?

72 (approx. 75% of the market)

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.

	<u>Association</u>	<u>Total from country</u>
▪ total number of language students in 2010	120.000	150.000
▪ total number of language student weeks in 2010		
▪ total number of high school and university students	2.500	3.000
▪ top 5 destinations in 2010 and % of the market of each		
<u>Destination</u>		<u>% of your students</u>
1 UK		36%
2 Ireland		24%
3 United States		20%
4 Canada		9%
5 Malta		5%

Visa regime – any new difficulties?

US visa procedures remained unchanged in 2010

Government Relations – any developments with your or other governments?

Close and cordial relations continued with the Spanish Ministry of Education for the operation of language scholarships granted by the government that started in 2007. A total of 30.000 scholarships of 1.700€ were granted in 2010 for students ages 16 to 30 for a 3 week course. ASEPROCE members sold the courses to 52% of the students that received the scholarships.

We also established good relations with AENA, the government institution that manages Spanish airports. We were invited to their summer operations annual meeting at the airport in Madrid-Barajas to obtain first-hand information about the airport operation during July and August. Collaborating with AENA by sharing information about the number of students travelling abroad from the Madrid airport helps both our students and the authorities in having a successful operation during the summer. AENA also granted special security passes to members operating youth

programs in order to supervise children travelling from other national airports to Madrid for their international flights.

Other key issues for the industry?

2010 was a great year for consolidating ASEPROCE as a referral for language programs, improving the other goal of the Association, which is to help agency members have a greater presence in the Spanish market. Our student fair "SALON DE LOS IDIOMAS" increased the number of visitors by 20%, both in Madrid and Barcelona where the events were held in 2010

Initiatives/Developments for your association?

ASEPROCE has increased investment in Internet development, improving the web site www.becasmec.org created to offer information about the scholarships and help members in selling programs to these students.

Improve and maximize our relations with the press and media to attain free exposure of Aseproce's mission and activities.

A greater part of the association budget was also destined to the law firm that offers advice and support to the association and members in legal issues and customer claims.

A claim service for customers, offering mediation and conciliation between (associated) agent and client in case of differences and conflicts. The percentage of claims with respect to the approximate number of programs sold by members has never amounted to more than 0.02%

Annual seminar for Aseproce agencies, about issues of general interest: fiscal policys, internet sales