

# National Report for FELCA AGM – 2016

YOUR ASSOCIATION NAME: IALCA

COUNTRY: ITALY

## AGENTS numbers in your country

Approximately, what is the total number of agents operating in your country?

**Around 350, including points of sale**

How many of these agencies are members of your association?

**20. 25 points of sale.**

## Markets

Please estimate the following, for your association:

- total number of language students in 2015: **21.300**
- total number of high school NA
- and university students NA
- the percentage of students your association accounts for from your country **15%**
- did the overall market grown or decline from 2014? **+0,5%**

### Top 5 destinations for your members in 2015 and % of the market of each

	<u>Destination</u>	<u>% of your students</u>	<u>Visa refusal rates%</u>
1	<b>UK</b>	<b>49%</b>	
2	<b>IRELAND</b>	<b>20%</b>	
3	<b>MALTA</b>	<b>9%</b>	
4	<b>USA</b>	<b>8%</b>	
5	<b>SPAIN</b>	<b>3%</b>	

## Trends in student numbers and student nationalities?

The number of students was fairly stable (+0,5%). The UK lost a few points of the market share (-4%) but it is still, by far, the most popular destination, as it is English the most popular language.

The 4 percentage points lost by the UK seem to have moved to Ireland (+4%). Easy explanation for this change: the rise of the pound against the euro in 2015. Mostly stable the performances of the other English speaking countries, with a slight increase for Canada and Australia.

## Visa regime – any new developments?

Nothing new: Italy does not need visas for short term courses in most of the destinations.

The procedure to get student visa for the USA is still a long and elaborate.

No other changes in 2015.

## Government Relations – any developments with your or other governments?

In 2015 Ialca went on with the contact established with the Ministry of Education.

One of the main issues discussed has been the one related to group travels i.e. PON and INPS.

In 2015 PON funding has been given to all the 20 Italian regions - before it was only for the southern regions. This change has not produced a growth in numbers. PON funding can also be used for infrastructural improvements, and a relevant part of the money actually went to restore the school buildings.

The collaboration continued as well with the Canadian Embassy and the Canadian school associations (Languages Canada and Caps-I).

## **Initiatives/Developments for your association?**

2015 has seen Ialca elections for the 2016-2018 period.

Lorenzo Agati has been confirmed as president.

Ialca signed a collaboration agreement with Quality English.

Among the many arguments discussed during 2015, two main subjects have been how the Italian market could change in relation to two new developments of the state fundings. One is about summer groups, with the new formula Inps that now is called "INPSieme" (Inps together).

The new formula allows students (from 2016) to book individually while before INPS was funding only groups. This will slowly open this specific market to many more agencies.

The other new funding system is called Itaca, and gives economical support to students wanting to study a year or a semester abroad. 860 scholarships have been granted for 2016.

## **Felca Agency Accreditation Code**

Please confirm that your members' brochures/websites have now been checked against the Felca Accreditation Code. **YES**

The Felca logo needs to be distributed to all your agency members and included on their brochures, business cards and websites. Has this been done? **YES**