

## AGENTS & Associations

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

**Approximately 220**

**How many agencies are members of your association?**

**42**

## Market Growth/Decline

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

- **This year is a better year in accordance with the total student numbers than 2009. However it seems this will not be able to create an important increase in agents' revenue because we see that the average weeks of study for language courses is decreasing.**
- **On the other hand, we see that ratio of the students who join a higher education programme (graduate or postgraduate) is increasing in total student numbers.**
- **There is not an important change for our students' changes about most preferred destinations in 2010.**

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

	<u>Association</u>	<u>Total from country</u>
▪ total number of language students in 2010	<b>28000</b>	<b>55500</b>
▪ total number of language student weeks in 2010	<b>290000</b>	<b>600000</b>
▪ total number of high school and university students	<b>5000</b>	<b>11250</b>

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

	<u>Destination</u>	<u>% of your students</u>
1	<b>UK</b>	<b>%38</b>
2	<b>USA</b>	<b>%37</b>
3	<b>Australia</b>	<b>%11</b>
4	<b>Canada</b>	<b>%8</b>
5	<b>Germany</b>	<b>%4</b>

## Visa regime – any new difficulties?

**Refusal rates in Visas for Australia are increasing. According to Visa Officers from Australia Consulate; almost %40 of ELICOS applications from Turkey was denied by visa section of Australian Embassy.**

**UK visa procedure is being changed too frequently. Sometimes it can be difficult to follow up these changes.**

**As UED we are trying to find solutions to these visa difficulties by communicating visa departments more closely.**

**On the other hand we have developed strong relationships with consulates/embassies of some other countries, to be able to open new markets for our member agents.**

**As a result of the co-operation of Irish Government and MEI and also with the support of UED, a new pilot visa system realized for Turkish student who want to go Ireland for Language education in summer. We are very glad to see the positive results and increase in the number of our students who get the benefits of this new pilot visa regime.**

**No visa problems with US visa applications.**

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

We have applied YOK-Higher Education Council, the government organization who administered higher education system of Turkey and ask for an appointment to discuss accreditation of foreign diplomas.(YOK's accreditation is essential for Turkish students who complete their university education abroad. Turkish students who are graduated from an university which is not recognized by YOK, are bound by longer military service(male students) and further education in Turkey would be jeopardized.) We are waiting for their confirmation. We have also visited Turkish Ministry of National Education.

#### Other key issues for the industry?

Turkey has been more and more integrated in the global market in the last decade, culturally as well as economically. When taking into account the fact that more than 50 % of Turkey's population consists of people younger than 30, it comes easy to predict and actually observe the Turkish youth's demand for study abroad.

Young people in Turkey at varying points on the age scala want to improve themselves by studying abroad in order to widen their horizons, realize the academic, cultural and eventually the economic progress in their lives. Stable economic growth of Turkish economy, also encourages these young population. Turkey's GDP growth rate for the first quarter of 2011 reached a record rate of 11 percent year-on-year. This current state of Turkey and its young population undoubtedly makes Turkey a can't-miss market for recruiting students for universities and language schools from around the world. We are glad to see the increasing interest of international education providers to Turkey market.

#### Initiatives/Developments for your association?

- Increasing number of member agents; 2 new member agents
- UED Magazine; UED has started to publish it's magazine. Each issue is being distributed to 15000 people free of charge.
- Support of Ireland pilot visa system
- Fam trips; France, Malta, Ireland
- UED goes on to support and participate a2 International Education Fairs and CDS Study Abroad Days events.
- We continue to apply personal & professional development programmes for the counselors who work for UED member agents to improve their relations with students&parents and to develop their selling skills.

#### Felca Agency Accreditation Code

Please give feedback for how many of you members' brochures/websites have now been checked.

We have informed all UED member agents about Felca's Accreditation Code however all of our members are agree that UED's own code not only mentions the same rules but also in a more detailed way. We have added FELCA Accreditation Code and every member of us has a link to this web page from their side.

We checked all of our members' web pages and brochures. (Fyi when an UED member publish a new copy, they send a copy to UED office and it's being check by UED staff) We can say that we did not face with any issues against Felca's code.

However, according to UED Code of Practise, to be able to apply penalties for members who do not follow the code this must be discussed in UED's General Assembly and accepted by a half of all our members at least. Our General Assembly will be held in November 2011 and UED Board has decided to discuss these Accreditation Code in the General Assembly.