



Market Intelligence Brief TURKEY

2019/2020



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EDUCATION
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1. AT A GLANCE



Market background

- Turkey is the world's 18th largest economy and Europe's seventh largest economy. Home to 83 million people, it is a strategically important country situated at the crossroads of Europe, Asia and Africa. The Turkish economy is primarily driven by tourism and manufacturing.
- The country has one of Europe's largest youth populations and has a median age of 32.4 years, compared with an average of 43.1 years across the EU. While the birth-rate is declining, Turkey's student-age population is set to remain steady for the coming years.
- While it has a large economy, its growth has faltered in recent years. Turkey entered recession in 2018 after suffering a currency crisis. Though it recovered by the end of 2019, the Covid-19 pandemic and resulting global recession has increased pressure on the Turkish economy, leading to a new currency crisis and high inflation. The Turkish economy is expected to contract by 5 per cent in 2020, and although severe, this is lower than the forecast of a 7.1 per cent contraction for Europe overall.



Local education trends

- Turkey's education system is highly centralised. Education is compulsory for 12 years in a 4+4+4 structure. However, school infrastructure is struggling to cope with an influx of refugees and there is a shortage of teachers. According to UNDP, average time spent in formal education in Turkey was 7.7 years in 2018 compared with 13 years in the UK.
- Although PISA scores indicated an improvement in 2018, Turkey's teenagers' scores remain well below the OECD average on all subjects in the tri-annual study.
- The majority of students are enrolled in public schools, but private schools are becoming more popular. Along with this, consumer expenditure on education is rising.
- There are 207 universities in Turkey. Of these, 129 institutions are public, 74 are private and four are private further education institutes. Despite this, there is a shortage of capacity and nearly 40 per cent of students who sat the university entrance examination in 2018 did not get a place. This has resulted in strong demand for short-cycle tertiary education programmes, with participation rates among the highest across OECD countries.



International education

- Turkey is aiming to host 200,000 international students by 2022, having already hosted 150,000 international students in 2018, considerably more than its closest neighbours. Of the countries bordering Turkey, Greece hosts the most international students, attracting 26,000 international students in 2018. Turkey's international students mostly come from Syria, Azerbaijan and Turkmenistan.
- About 46,000 Turkish students go abroad for tertiary study each year, a remarkably static number over the past decade. The US remains the most popular destination, though interest is steadily declining. The UK is the second most popular destination and has seen modest growth in recent years. Canada, Germany, Australia and China are also seeing increasing numbers of Turkish students. Separately, there were about 17,900 Turkish students on Erasmus+ programmes in 2017/18.
- In 2018/19, there were 4,130 Turkish enrolments at UK HEIs, a 3 per cent increase from the previous year and the second consecutive year of growth. This is also the highest number of Turkish students in a decade.
- Turkey is primarily a postgraduate market for the UK, accounting for 61 per cent of all Turkish enrolments in UK HEIs in 2018/19.

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- While Turkey has regulations in place for establishing joint degrees with foreign universities, other forms of TNE such as international branch campuses, franchise and validated degrees are not permitted.

2. INTRODUCTION

The Republic of Turkey is a transcontinental country with a rich history. With the Black Sea to the north, the Mediterranean to the south and the Aegean Sea to the west, it is strategically located with easy access to most of Europe, the Middle East and Africa. Its relatively large economy, large population and proximity to strategically important regions make it a valuable geopolitical partner. Its largest city, Istanbul, straddles the European and Asian continents. Turkey now has the third largest population in Europe, which grew by 1.5 per cent in 2019. There is a large youth population, with a median age of 32.4, nearly 10 years younger than the European median age of 41.3.

Its strategic location means that Turkey has a unique advantage for international business. The country is looking to attract even more international companies to its shores, increasing demand for English skills. This means that tertiary study in English-speaking destinations is a competitive advantage for graduates in the job market, reflected in the increasing number of Turkish students going abroad.

The UK hosted 4,130 Turkish higher education students in 2018/19, a 3 per cent increase from the previous year and the highest number in a decade. The most popular subject for both undergraduates and postgraduates was business and administrative studies. The UK is the second most popular destination for outbound Turkish students, after the US, though interest in Australia and Canada is rising as the US loses ground.

The primary reason Turkish students are increasingly looking abroad is a shortage of seats at quality domestic institutions. While there are over 200 higher education institutions in Turkey, only 40 per cent of candidates who passed the higher education entrance examination obtained a place. Additionally, the Turkish Council of Higher Education has only recently introduced a Quality Assessment Council to address high rates of unemployment among graduates and the gap between graduate skills and labour market needs.

The Covid-19 pandemic and resulting global recession have weighed heavily on Turkey's economy in 2020. Significantly dampened tourism activity and lower export demand are projected to cause Turkey's economy to contract by 5 per cent in 2020 and have already caused the Turkish lira to fall to historic lows. This latest currency crisis, following similar currency collapses in 2014 and 2018, means that overseas study will be increasingly expensive for Turkish students, which in the past has constrained demand for study abroad.

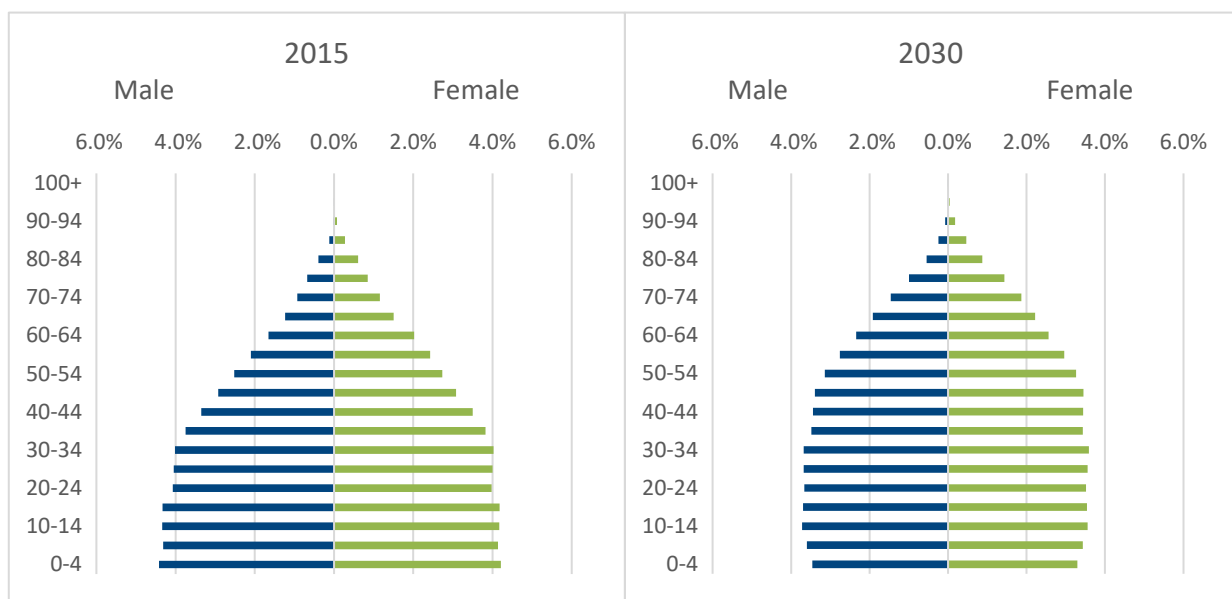
However, as the global economy bounces back from the Covid-19 crisis, Turkey's recovery could come with significant opportunity for UK HEIs. The large youth population, rising demand for quality education, domestic HE capacity constraints and increasing willingness of Turkish households to spend on education will underpin Turkey's status as a major source country of international students.

3. DEMOGRAPHICS

According to the Turkish Statistical Institute, the population reached 83 million people at the end of 2019, making it the third most populous country in Europe, behind Russia and slightly behind Germany.¹ Turkey has a relatively young population but the proportion of senior citizens is growing quickly.

While the population continues to grow, the birth rate has fallen from 4.3 births per female in 1980 to two births per female in 2019, slightly below the replacement rate but above the regional average.² To avoid a demographic crisis in the future, the Turkish government has implemented incentives to encourage families to have more children and has increased support for working mothers. One such incentive is one-time payments to parents for new-borns.³

Figure 1: Turkey's population pyramid, 2015 and 2030



Source: UN WPP

The Turkish population will remain relatively youthful in the coming decades, but there are already some signs of greying. The median age was 32 in 2019 and is expected to rise to 36 by 2030. The quickly rising median age is in part explained by a falling proportion of the population aged 0-14, which decreased from 26 per cent in 2007 to 23 per cent in 2019.⁴ The proportion of the population at working age (ages 15-64) has increased from 52 per cent in 2014 to 59 per cent in 2019.⁵

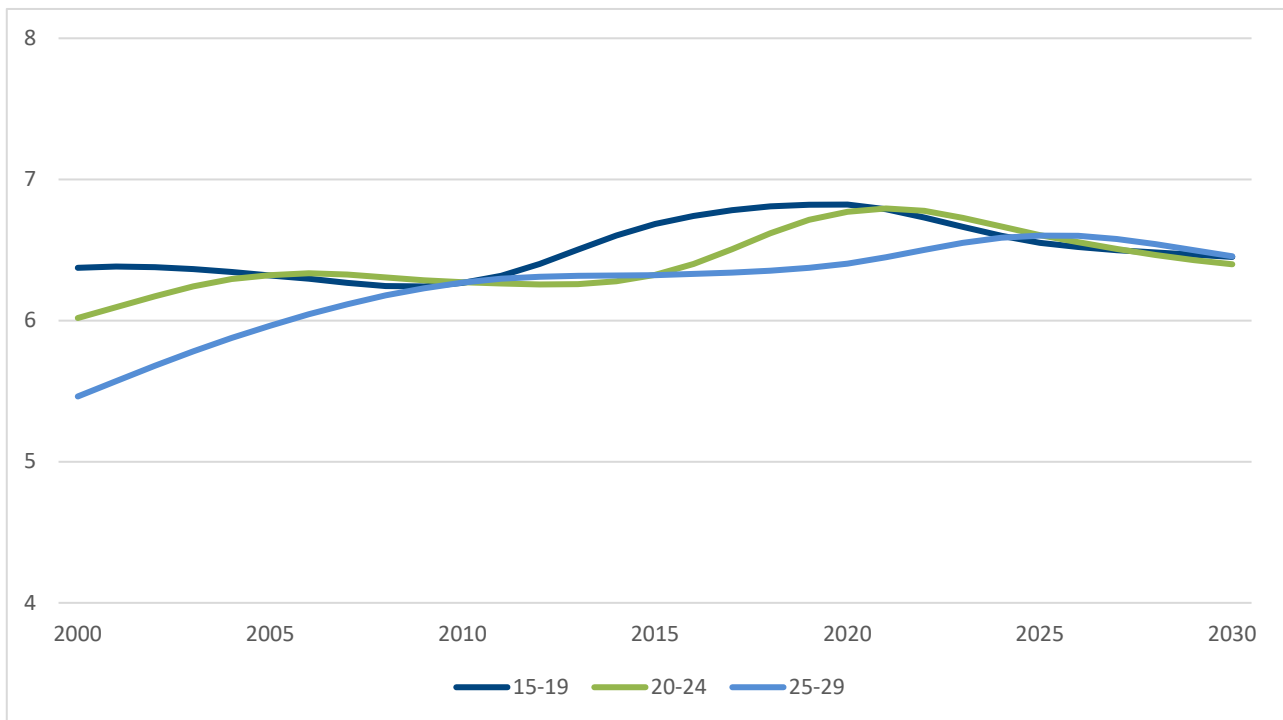
¹ [Turkey's population tops 83.15M in 2019](#), Anadolu Agency, 4 February 2020.

² [Turkey: Country Profile](#), Euromonitor International, 13 July 2020.

³ [Turkey's population exceeds 83 million in 2019](#), Daily Sabah, 4 February 2020.

⁴ [Turkey's population tops 83.15M in 2019](#), Anadolu Agency, 4 February 2020.

⁵ [Labour Force Status of 15-64 Age Group](#), TurkStat, accessed 26 November 2020.

Figure 2: Turkey's student age population (millions)

Source: UN Population Division

Turkey has the youngest and fastest-growing population in Europe.⁶ More than half of the population is under the age of 32, indicating steady future demand for education. However, the segment of the population aged 15-19 is expected to have peaked before 2020, after which it is expected to slowly decline, indicating a gradual downward trend in demand for tertiary education.

Istanbul is Turkey's largest city, with 15.5 million residents in 2019, or 19 per cent of the total population, followed by Ankara, home to 5.6 million people. According to TurkStat, nearly 93 per cent of Turkey's population are living in cities and district centres, up 0.5 per cent from the year before.⁷

The official language of Turkey is Turkish, but there are many minority languages spoken across the country, including Kurdish. Between 70-75 per cent of the population is ethnically Turkish and about 20 per cent is Kurdish, with other ethnic minorities making up between 7 and 12 per cent of the population.⁸

Turkey is a secular state that allows for freedom of religion under its constitution, but about 99 per cent of the population are Muslims, of whom 80 per cent are Sunni. Within the remainder there are many Christian minorities (particularly Greek Orthodox, but also Armenian and Syriac) and Jews, among other religions.⁹

Due to its shared border with Syria, Turkey has received an estimated 3.6 million Syrian refugees who have fled from the civil war. Though the government is receiving assistance from the World Bank to support Syrian refugees, the influx is putting further strain on already-stressed public services.¹⁰

⁶ [Turkey: Overseas Business Risks](#), Foreign and Commonwealth Office, 2 August 2019.

⁷ [Ratio of City-Village Population](#), TurkStat, accessed 26 November 2020.

⁸ [Turkey](#), CIA World Factbook, accessed 26 August 2020.

⁹ [Population: Demographic Situation, Languages and Religions](#), European Commission Eurydice, 4 November 2019.

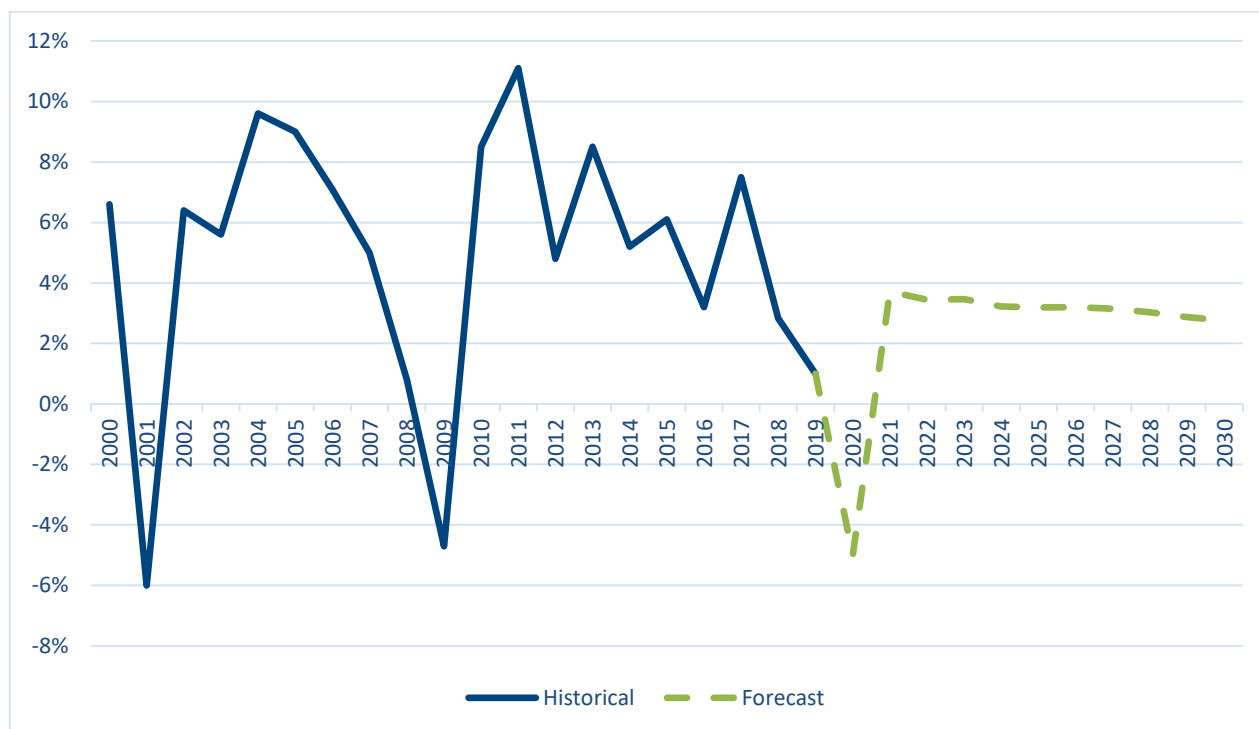
¹⁰ [Country Snapshot: Turkey](#), The World Bank, April 2020.

4. ECONOMICS

Turkey is the world's 18th and Europe's seventh largest economy.¹¹ It is a member of the Organisation for Economic Co-operation and Development and the G20. The country has developed significantly since 2000, was one of the fastest-growing economies in the OECD between 2003-2018 and is classified as an upper-middle-income country (gross national income per capita of between US\$4,000 – US\$12,500), China and Brazil being other examples.¹² Since 2003, the proportion of the population living in absolute poverty has declined from 36 to 9 per cent.¹³

Like most countries, Turkey's 2020 economic forecast was revised down, to a 5 per cent contraction, due to the Covid-19 pandemic and resulting global recession. The forecast is however less severe than for Europe as a whole, which the IMF predicts to suffer a 7.1 per cent contraction. GDP growth was just 1 per cent in 2019, down from 2.8 per cent in 2018 and 7.5 per cent in 2017.¹⁴ Though the Turkish economy slid into recession in early 2019, it returned to growth at the end of the year. However, the Covid-19 pandemic has had a major negative impact on Turkey's exports, tourism and currency stability, causing high inflation.¹⁵ In 2019, Turkey's GDP per capita was US\$9,042, level with the average across upper-middle-income economies.¹⁶

Figure 3: Real GDP Growth and forecast



Source: IMF, Euromonitor forecasts

¹¹ [Turkey: Political and Economic Situation](#), European Commission Eurydice, 4 November 2020.

¹² [Invest in Turkey](#), Invest.gov.tr, August 2019.

¹³ [Country Snapshot: Turkey](#), The World Bank, April 2020.

¹⁴ [Turkey and the IMF](#), IMF, accessed 31 August 2020; [Real GDP growth](#), IMF, accessed 03 November 2020.

¹⁵ [Country Snapshot: Turkey](#), The World Bank, April 2020.

¹⁶ [GDP per capita \(current US\\$\)](#), World Bank Data, accessed 31 August 2020.

The services sector accounts for 54 per cent of GDP and employs 55 per cent of the country's workforce.¹⁷ In 2018, Turkey attracted 45 million foreign visitors (top source countries being Russia and Germany) and the hospitality sector accounts for 8 per cent of all workers and generates significant demand for other products and services.¹⁸ ¹⁹ Industry accounts for 30 per cent of GDP and employs a quarter of the country's workforce, with manufacturing the main industrial activity. Agriculture contributed 6 per cent of GDP and employs about 19 per cent of the workforce.²⁰

Due to its geographic location at the crossroads of Europe, Asia and Africa, Turkey is seen as a strategic economic and political partner. Turkey is an energy transit country with the capacity to transport 121 million tons of oil to world markets per year, roughly 3 per cent of annual global oil consumption. In 2018, the opening of the Trans-Anatolia Natural Gas Pipeline allowed the transit of natural gas from Azerbaijan to European markets.²¹ Turkey also announced in August 2020 that some 320 billion cubic meters of natural gas reserves had been found in the Black Sea, by far its largest ever discovery of new natural gas sources.²² A growing number of multinational companies are choosing Turkey as a hub for manufacturing and exports, and it is increasingly a management hub for large companies as well. Between 2003 and 2018, the most attractive sectors for foreign direct investment (FDI) were finance, manufacturing, energy and ICT.²³

In order to continue to attract major international companies, Turkey has introduced many reforms to make business easier. There has been some success, as reflected in the World Bank's 2020 Ease of Doing Business report where Turkey ranked 33rd out of 190 economies, up from 43rd in 2019 and 60th in 2018. It ranked above Poland, Hungary, Romania and Bulgaria.²⁴ Turkey however also ranked 61st out of 141 economies in the Global Competitiveness Index 2019, level with the previous year, behind its regional neighbours Bulgaria (49th) and Romania (51st).²⁵

Turkey's Eleventh National Development Plan 2019-23 is the first five-year stage of a fifteen-year development plan. The plan aims to transform Turkey's economic structure and maintain stability while boosting human capital and improving education and innovation. The Turkish government seeks to boost domestic production, accelerate industrialisation in priority manufacturing sectors, and boost agriculture, tourism and defence. The plan has five pillars: a stable and strong economy; competitive production and productivity; strengthened human capital; liveable cities and sustainable environment; and rule of law, democratisation and good governance.²⁶

Under Turkey's current partnership framework with the World Bank, the country has so far received US\$3.9 billion in development aid. The partnership started in 2018 and will run until 2023.²⁷ The government budget deficit increased to an equivalent of 3 per cent of GDP in 2019, up from 2.4 per cent in 2018.²⁸ The deficit is expected to widen to 5 per cent in 2020.²⁹

Before the pandemic unemployment was already relatively high in Turkey, reaching 13.7 per cent in late 2019, up from 11 per cent at the end of 2018 and well above the EU average of 7.5 per cent. Youth

¹⁷ [The economic context of Turkey](#), *Nordea Trade*, July 2020.

¹⁸ [Turkey economic outlook](#), *OECD Economic Outlook, Volume 2020 Issue 1*, accessed 02 December 2020.

¹⁹ [Turkey - Tourism in the economy](#), *OECD iLibrary*, accessed 03 November 2020.

²⁰ [The economic context of Turkey](#), *Nordea Trade*, July 2020.

²¹ [Turkey: Overseas Business Risks](#), *Foreign and Commonwealth Office*, 2 August 2019.

²² [Turkey to supply its own gas by 2023](#): Energy minister, *Energy, Anadolu Agency*, August 2020

²³ [Why Invest in Turkey](#), *Invest.gov.tr*, August 2020.

²⁴ Ibid.

²⁵ [The Global Competitiveness Report 2019](#), *World Economic Forum*, 2019.

²⁶ [Eleventh Development Plan 2019-2023](#), *Turkish Strategy and Budget Directorate*, June 2020.

²⁷ [Country Snapshot: Turkey](#), *The World Bank*, April 2020.

²⁸ Ibid.

²⁹ [The economic context of Turkey](#), *Nordea Trade*, July 2020.

unemployment is even higher, surging from 19.3 per cent at the end of 2018 to 25 per cent at the end of 2019.³⁰

The Turkish lira has weakened significantly throughout 2020, down about 30 percent against the U.S. dollar and trading at record lows of 8.5 lira per 1US\$ by early November. A loose monetary stance and depreciation has contributed to the persistence of high inflation, which stood at 11.9 percent year-on-year in October and is anticipated to remain about this level for 2021.³¹

A weak lira, high inflation and economic recession will make international study more expensive for Turkish students and may cut into demand. However, foreign exchange rate changes have historically had little effect on overseas study among the Turkish upper middle-class, and demand for UK independent schools has increased.

³⁰ Ibid.

³¹ AL-Monitor 03 November 2020 [Inflation rises in Turkey as lira falls for ninth consecutive day](#).

5. POLITICS & POLICYMAKING

The Republic of Turkey transitioned from single-party rule to a multi-party system in 1946. Turkey's president is elected by parliament for five-year terms. The parliament is a unicameral chamber called the Grand National Assembly. It has 600 members, who are elected by proportional representation for four-year terms.³² The last general election was held in June 2018, when President Recep Tayyip Erdogan was elected for a second term with 53 per cent of the vote. The next elections are set to be held in 2023.

In 2017, a constitutional referendum transformed Turkey's parliamentary system into a presidential republic, abolishing the position of Prime Minister. The referendum approved 18 measures that revised or repealed 76 articles, giving the presidency broader political, social and economic powers.³³

In the southeast of the country, Turkey shares borders with Syria and Iraq. The 900-kilometre border with Syria has had a destabilising effect due to its civil war that has caused millions of refugees to flee to Turkey. In 2020, there were more than 3.6 million Syrian refugees living in Turkey. Turkey has also accepted immigrants who are being returned from Greece.³⁴

In 2016, an attempted coup left 241 people dead and over 2,000 people injured. The government declared a state of emergency that officially expired in 2018, but many of the restrictions implemented at the time are still in place.³⁵ The response to the coup raised concerns among Turkey's traditional Western allies, leading to strained relations with the United States and the EU.³⁶

Due to its strategic location straddling Europe and Asia, Turkey is a key international partner for many countries. Its importance to the European Union is especially clear in issues of migration and security, as the country is hosting millions of Syrian refugees. In this context, the two sides have agreements to stem the influx of irregular migration from Turkey to the EU, as well as agreements that provide EU support for refugees in Turkey.³⁷

Turkey was declared as eligible to join the European Union in 1997, and accession negotiations began in 2005. Turkey is a key partner of the EU on security and economic matters, but backsteps regarding the state of democracy and the rule of law have slowed negotiations. As of June 2018, negotiations have frozen.³⁸

³² [Turkey: Country Profile](#), *Euromonitor International*, 13 July 2020.

³³ [The Turkish constitutional referendum, explained](#), *Brookings Institution*, 13 April 2017.

³⁴ [Country Snapshot: Turkey](#), *The World Bank*, April 2020; [Turkey: Country Profile](#), *Euromonitor International*, 13 July 2020.

³⁵ [Turkey: Overseas Business Risks](#), *Foreign and Commonwealth Office*, 2 August 2019.

³⁶ [Turkey: the political outlook for 2020](#), *Economist Intelligence Unit*, 11 December 2019.

³⁷ [European Neighbourhood Policy and Enlargement Negotiations: Turkey](#), *European Commission*, 2 December 2019.

³⁸ *Ibid.*

6. EDUCATION

Turkey is investing heavily to improve its education system and overall outcomes are improving over time, though capacity constraints exist at all levels. Turkey's education system has a highly centralised structure. Education policy is set by the Ministry of National Education at the pre-tertiary level and the Council of Higher Education at the tertiary level. Education is publicly funded and overall funding increased by 24 per cent between 2010 and 2016, while it decreased by 7 per cent on average across OECD countries during this period.³⁹

The literacy rate for those aged 15-24 was 99.8 per cent in 2017 and was slightly higher for males than females (99.9 per cent compared with 99.6 per cent, respectively). Among the older population, the gender gap widens. For the entire population over the age of 15, the male literacy rate was 98.8 per cent in 2017 but 93.5 per cent for females.⁴⁰

Pre-tertiary education

Compulsory education in Turkey lasts for 12 years and is divided into three stages: primary school (first through fourth grade), lower secondary school (fifth through eighth grade) and high school (ninth through 12th grade), a 4+4+4 format.⁴¹ Children aged 36-68 months may attend kindergarten while children aged 48-68 months may attend nursery school. Pre-school education is optional and free in official institutions, and the government aims for all children to benefit from pre-school education for at least one year.⁴²

Because pre-tertiary education is highly centralised, state schools have little autonomy and capacity to respond to local needs. According to the OECD, schools in Turkey are struggling to cope with the population influx from rural to urban areas and are underfunded.⁴³ In 2018, 60 per cent of Turkish adults ages 25-64 had attained below an upper secondary education as their highest level of formal education, nearly triple that of the OECD average.⁴⁴ According to UNDP, the mean time spent in education in Turkey was 7.7 years in 2018 compared with 13 years in the UK.⁴⁵

Historically, few Turkish students have enrolled in pre-primary education, but the proportion of those attending is growing, standing at 37 per cent in 2018.

The Turkish private school sector is growing in response to increasing demand straining public school provision. In 2017, more than one million students were enrolled in 1,777 private schools across Turkey.⁴⁶ Public school classrooms in urban areas are often overcrowded, and private schools offer notably smaller classroom sizes. In 2017, public schools had an average of 35 students per classroom, compared to an average of 20 at private schools. The government is encouraging the expansion of private schools, and the share of private schools increased from 4 per cent to 13 per cent between 2001 and 2016.⁴⁷

In the OECD's 2018 PISA study, students in Turkey ranked below the OECD average in the three assessed subjects of mathematics, science and reading. However, Turkey's mean scores in the PISA study have

³⁹ [Turkey's Educational Context](#), OECD, accessed 28 August 2020.

⁴⁰ [Turkey](#), UNESCO UIS, accessed 28 August 2020.

⁴¹ [Turkey: Organisation and Governance](#), European Commission Eurydice, 26 July 2019.

⁴² [Turkey: Early Childhood Education and Care](#), European Commission Eurydice, 26 July 2019.

⁴³ [Turkey's Educational Context](#), OECD, accessed 28 August 2020.

⁴⁴ [Adult education level](#), OECD data indicator, accessed 28 August 2020.

⁴⁵ [The Global Competitiveness Report 2019](#), World Economic Forum, 2019.

⁴⁶ [Private Schools: "Strong Potential of Turkish Education Sector & Education Real Estate Market"](#), British Chamber of Commerce Turkey, 2018.

⁴⁷ [The Turkish education system](#), OECD iLibrary, accessed 04 November 2020.

been on an overall gradual positive trend, excluding anomalous 2015 results where Turkey scored much lower than its overall trend would suggest.⁴⁸

After the end of lower secondary school, students have the option of entering a four-year vocational secondary education programme. At the tertiary level, there are two-year vocational programmes. The Turkish government has identified TVET as a way of increasing qualified labour and is seeking to improve the TVET sector. The budget allocated to TVET doubled from TRY6.3 billion in 2013 to TRY12.5 billion in 2018. In 2017/18, there were over 1.9 million students in TVET at the secondary level. In addition to formal secondary TVET schools, there is also informal TVET education, provided through the Vocational Open High School, which provides distance learning.⁴⁹ In the 2019 WEF global competitiveness report, Turkey ranks 100th and 113th for quantity and quality, respectively, of skills in the current workforce, but its future workforce is expected to acquire more modern skills.⁵⁰

Higher education

The Turkish higher education system has grown dramatically in recent decades but still struggles to keep up with domestic demand. Higher education is regulated by the Council of Higher Education. There are 207 universities in Turkey, a considerable increase from just 12 in 1979.⁵¹ Of these, 129 institutions are public, 74 are private and four are public foundation further education institutes.⁵² In 2017, barely 8 per cent of tertiary students were enrolled in private HEIs, one of the lowest rates in the OECD.⁵³ Public institutions provide tuition free of charge, while private HEIs can charge as much as US\$20,000 per year.⁵⁴ Turkey has 34 universities in the 2020 Times Higher Education World University Rankings. The top universities were Cankaya University and Sabancı University, both of which ranked in the 401-500th bracket.⁵⁵

Entrance for university is through an exam known as the Higher Education Institution Exam (YKS). There are three parts of the exam, of which only the first is compulsory. The first part is a basic proficiency test, the second is an assessment in more specific fields (Field Qualification Test), and the third is a Foreign Language Test.⁵⁶ In 2020, 2.5 million people sat the exam despite the Covid-19 pandemic. In 2019, 74 per cent of YKS candidates passed the first part of YKS but just 39 per cent passed the second part of the exam.⁵⁷

Passing the YKS is however not a guaranteed key to higher education. In 2018, only one in four students qualified to enter higher education found places in domestic universities, just over 471,000 of about two million qualified students.⁵⁸ About 80 per cent of those who matriculated to university enrolled in public institutions. Many university students – about three million of the seven million students enrolled in higher education – are studying on distance courses.⁵⁹

Bachelor's degree programmes typically last four years, master's programmes take between 18 months and two years and doctoral programmes typically take four years to complete. Short-cycle programmes

⁴⁸ [Country Note: Turkey](#), *PISA 2018 Results*, 3 December 2019.

⁴⁹ [Outlook of Vocational and Technical Education in Turkey](#), *Turkish National Ministry of Education*, November 2018.

⁵⁰ [The Global Competitiveness Report 2019](#), *World Economic Forum*, 2019.

⁵¹ [Universities in Turkey](#), *Higher Education Council*, accessed 27 August 2020; [Numbers of Turkish universities soar, but quality falls](#), *Al-Monitor*, 6 February 2019.

⁵² [Öğrenim Düzeyine Göre öğrenci Sayısı](#), *Yükseköğretim Bilgi Yönetim Sistemi*, accessed 16 October 2020.

⁵³ [Turkey: Overview of the education system](#), *OECD GPS Education*, 2019.

⁵⁴ [Joblessness high among university graduates in Turkey](#), *ICEF Monitor*, 1 May 2019.

⁵⁵ [Where to study in Turkey](#), *Times Higher Education*, accessed 27 August 2020.

⁵⁶ [Turkey: Bachelor](#), *European Commission Eurydice*, 26 July 2019.

⁵⁷ [In Turkey, 2.5m students sit university entry exam despite COVID-19 outbreak](#), *Global Voices*, 17 July 2020.

⁵⁸ [Numbers of Turkish universities soar, but quality falls](#), *Al-Monitor*, 6 February 2019.

⁵⁹ [Joblessness high among university graduates in Turkey](#), *ICEF Monitor*, 1 May 2019.

are gaining in popularity, with 48 per cent of first-time tertiary entrants enrolling in short-cycle tertiary programmes, the highest among OECD countries.⁶⁰

In 2018, 19.5 per cent of Turkish adults ages 25-64 had completed upper secondary education as their highest level of education and 20 per cent had completed tertiary education, compared with the OECD averages of 42 per cent and 37 per cent, respectively.⁶¹ This is an improvement from 2008, when just 12 per cent of Turkish adults ages 25-64 had completed tertiary education.

Unemployment rates for graduates are high, indicating that universities are not adequately preparing graduates for labour market demands. In 2019, unemployment among those aged 15-24 was 27 per cent. Among the 3.7 million unemployed people in Turkey that year, one quarter had university degrees.⁶² The tough job market may support further demand for overseas study as foreign degrees may provide a competitive edge.

In the SciMago country and journal rankings, Turkey scores 20th in terms of research output, with significant journal output in medicine and engineering. In 2019, one-quarter of research was done with international collaboration.⁶³ The US is Turkey's largest collaboration partner in research output, according to the Nature Index, followed by Germany, China, and the UK.⁶⁴ Turkey ranked 51st in the 2020 Global Innovation Index, eighth among the ten upper-middle-income countries on the index.

Key policies related to education

According to TurkStat, total spending on education (public and private) increased by a massive 22 per cent in 2018. However, with inflation averaging 16 per cent in 2018, in real terms the increase was less dramatic and spending as a proportion of GDP increased marginally from 5.7 to 5.8 per cent. The split between public and private spending on education breaks down at about 75:25 respectively.

In 2018, Turkey released a policy blueprint for education through to 2023, known as the "Turkey Education Vision 2023." The vision sets 44 goals in different parts of education, including introducing data-based management in schools, streamlining measurement and evaluation, reducing achievement gaps, improving vocational education, and strengthening the quality of natural sciences education.⁶⁵ The vision also aims to improve learning, restructure teacher education and improve school infrastructure.

The "Turkey Strategic Vision 2023," which marks the 100th year since the establishment of the Government of the Republic of Turkey, includes goals for education, including: equipping classrooms and schools with 450,000 interactive whiteboards and providing 11 million tablets to students; implementing reform of the Council of Higher Education; and increasing the number of private universities and the number of teachers in universities.⁶⁶

Turkey's Monitoring and Evaluation of Academic Abilities project aims to assess the outcomes of the current education system and measure students' critical thinking skills. The project is set to be conducted every two years to meet the learning analytics goal of Turkey's Education Vision 2023.⁶⁷ Quality assurance in higher education gained new traction after Turkey participated in the 2001 Bologna process, which gained further momentum after 2005. A national system for quality assurance

⁶⁰ [Turkey: Education at a glance 2019](#), OECD, 2019; short-cycle tertiary education refers to programmes at ISCED level 5, comparable to an associate degree.

⁶¹ [Adult education level](#), OECD data indicator, accessed 28 August 2020.

⁶² [Joblessness high among university graduates in Turkey](#), ICEF Monitor, 1 May 2019; [One fourth of Turkey's unemployed university graduates - report](#), Ahval News, 24 February 2019.

⁶³ [Turkey](#), SciMago, accessed 3 September 2020.

⁶⁴ [Country Outputs: Turkey](#), Nature Index, July 2020.

⁶⁵ [Turkey's Education Vision 2023](#), Turkey Ministry of National Education, 2018.

⁶⁶ [Turkey education policy outlook 2019](#), OECD, 2019.

⁶⁷ Ibid.

has been in development with participation from a Bologna Experts Team over six project phases.⁶⁸ In 2015, the Council of Higher Education established the Higher Education Quality Council, which conducts quality assessments of universities. In 2019, a quality assurance system for TVET was established. The Quality Assurance Directive of the Vocational and Technical Education Institutions determines procedures and principles on quality assurance in TVET.⁶⁹

International student recruitment

Overall inbound trend

Turkey aims to host 200,000 international students by 2022.⁷⁰ It has already developed into a local education hub and inbound student numbers almost tripled between 2014 and 2018. It hosted 150,000 foreign students in 2018, considerably more than its closest neighbours. Of the countries bordering Turkey, Greece hosts the most international students, attracting 26,325 international students in 2018, according to UNESCO.

A total of 207 universities in Turkey offer 60,000 programmes for international students, and there are many scholarships available. In 2019, 146,000 foreign students applied for the Turkey Scholarship scheme funded by the Presidency for Turks Abroad and Related Communities.⁷¹ In 2017/18, the major sending countries for international students were Syria (over 20,000 students), Azerbaijan (17,000 students) and Turkmenistan (12,000). Iran, Afghanistan, Iraq, and Germany also sent more than 4,000 students in 2017/18.⁷²

In 2019, Turkey further opened opportunities for international students to study in Turkey by abolishing limits on international enrolments. Until May 2019, Turkish universities could only accept international students if their total number did not exceed 50 per cent of the overall student quota defined for new admissions.⁷³

Overall outbound trend

According to UNESCO data, outbound mobility from Turkey has been remarkably stable over the past decade, with about 46,000 degree seeking students going abroad each year. Lack of domestic HE capacity is a key driver of mobility. The US and the UK are the top destinations, but Canada, Australia, Germany, and China are increasing in popularity.⁷⁴ Turkish students are eligible for programmes under Erasmus+, and in 2017 there were 17,902 outbound Turkish exchange students on Erasmus programmes – in addition to the above degree seeking students.⁷⁵

While Turkish students view foreign degrees as prestigious, developing foreign language competency, particularly English, is a major motivation for studying abroad.

According to a member survey from the Association of International Education Counsellors Turkey (UED), six in ten outbound Turkish students chose to pursue studies abroad in order to improve their career prospects.⁷⁶

UK recruitment

In 2018/19, there were 4,130 Turkish students enrolled in UK HEIs, a 3 per cent increase from the previous year and the highest number in a decade. This was the second consecutive year of growth

⁶⁸ [Higher Education in Turkey 2019](#), Turkey Council of Higher Education, 2019.

⁶⁹ [Turkey education policy outlook 2019](#), OECD, 2019.

⁷⁰ [Turkey removes international student quotas and signals recruitment strategy](#), ICEF Monitor, 22 May 2019.

⁷¹ [Turkey becomes education hub for international students](#), Anadolu Agency, 9 January 2020.

⁷² [Higher Education in Turkey 2019](#), Turkey Council of Higher Education, 2019.

⁷³ [Turkey abolishes limit on international students numbers at universities](#), The PIE News, 14 May 2019.

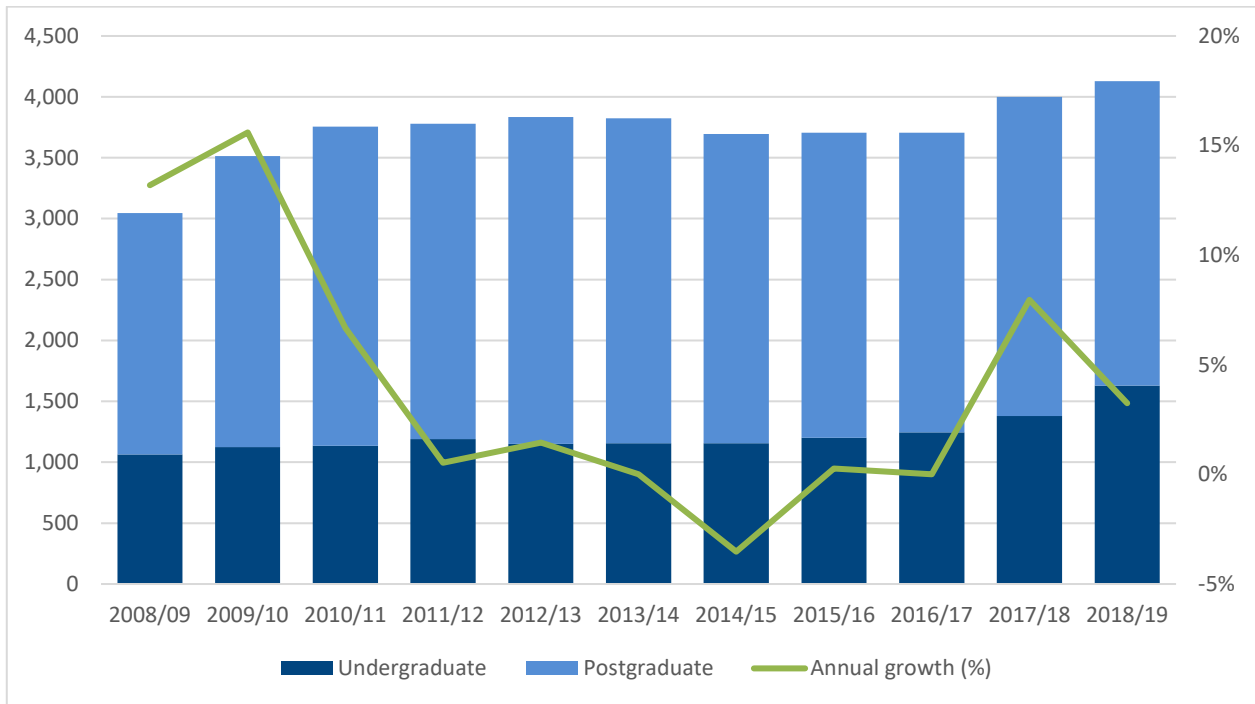
⁷⁴ [Checking in on Turkish outbound](#), ICEF Monitor, 14 November 2018.

⁷⁵ [Higher Education in Turkey 2019](#), Turkey Council of Higher Education, 2019.

⁷⁶ [Checking in on Turkish outbound](#), ICEF Monitor, 14 November 2018.

(though a slower rate than the 8 per cent growth in 2017/18) after six years of relative stagnation. A decade earlier, there were 3,045 Turkish students enrolled in UK HEIs.

Figure 4: Turkish students in HE programmes in the UK

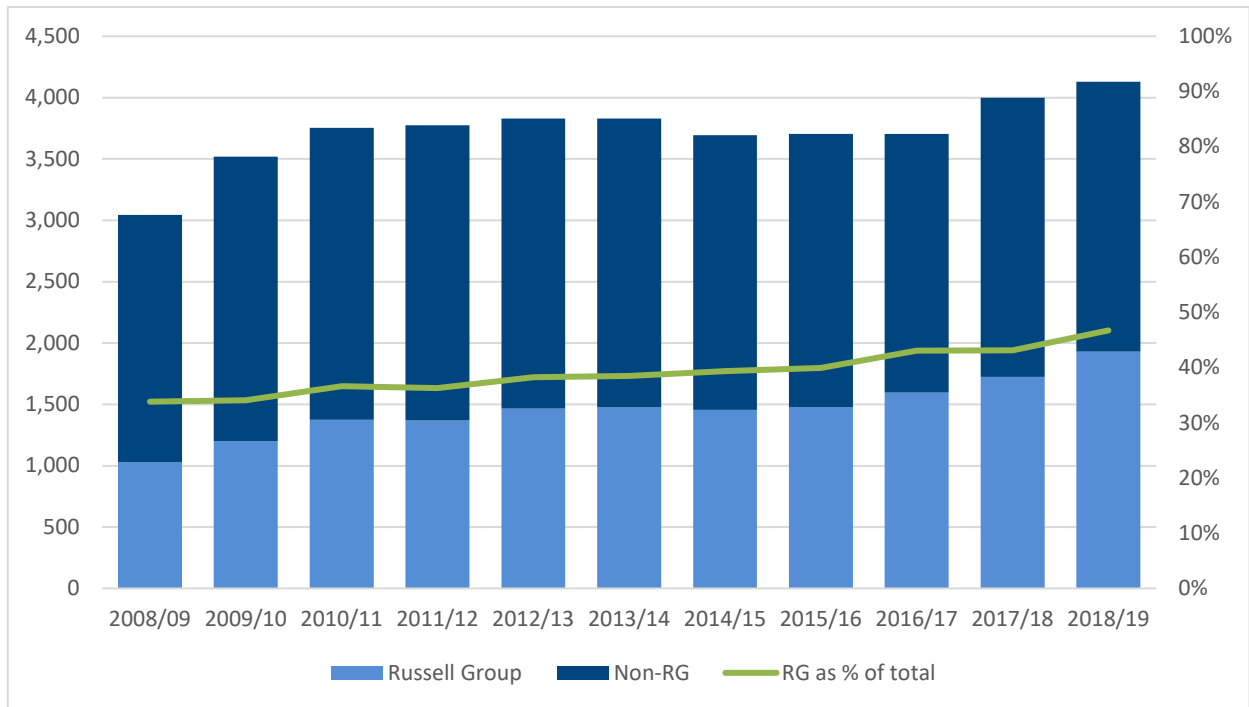


Source: HESA

Turkey is primarily a postgraduate market. In 2018/19, there were 2,500 postgraduates and 1,630 undergraduates, a 61-39 split. While postgraduate enrolments have dominated in the last decade, the proportion of undergraduate enrolments is increasing. In 2013/14, undergraduates accounted for just 30 per cent of all enrolments.

The global Covid-19 pandemic is likely to hit Turkish enrolments in the UK. Visa issuance data covering Q1 to Q3 shows a drop of 44 per cent over the same period compared to 2019, indicating that considerably fewer Turkish students are intending to begin studying in the UK during the 2020/21 academic year.

Figure 5: Turkey HE enrolments in the UK



Source: HESA

In 2018/19, Russell Group enrolments accounted for nearly half (47 per cent) of all Turkish enrolments at UK HEIs. This proportion has increased since 2008/09 when Russell Group institutions received 34 per cent of enrolments.

Subject areas

Figure 6: New UK enrolments according to subject area, YoY change

	Total new UK enrolments in 2018/19	Undergraduate			Postgraduate		
		New UK enrolments in 2018/19	Change from previous year	5-year trend	New UK enrolments in 2018/19	Change from previous year	5-year trend
Business & administrative studies	840	420	20.0%		420	-18.4%	
Engineering & technology	545	185	15.6%		360	-1.4%	
Social studies	500	190	2.7%		310	-3.1%	
Law	360	90	20.0%		270	-5.3%	
Biological sciences	330	135	22.7%		195	-13.3%	
Computer science	230	80	14.3%		150	36.4%	
Creative arts & design	205	120	4.3%		85	-10.5%	
Architecture, building & planning	170	80	14.3%		90	5.9%	
Languages	160	80	23.1%		80	-11.1%	
Education	155	5	0.0%		150	7.1%	
Mass communications and documentation	110	70	55.6%		40	-27.3%	
Physical sciences	105	15	50.0%		90	20.0%	
Historical and philosophical studies	95	35	40.0%		60	-7.7%	
Subjects allied to medicine	85	20	33.3%		65	-7.1%	
Medicine & dentistry	80	10	0.0%		70	55.6%	
Combined	60	60	9.1%		0	0.0%	
Mathematical sciences	50	15	50.0%		35	-12.5%	
Agriculture & related subjects	35	10	100.0%		25	-28.6%	
Veterinary science	10	5	0.0%		5	*	

Source: HESA

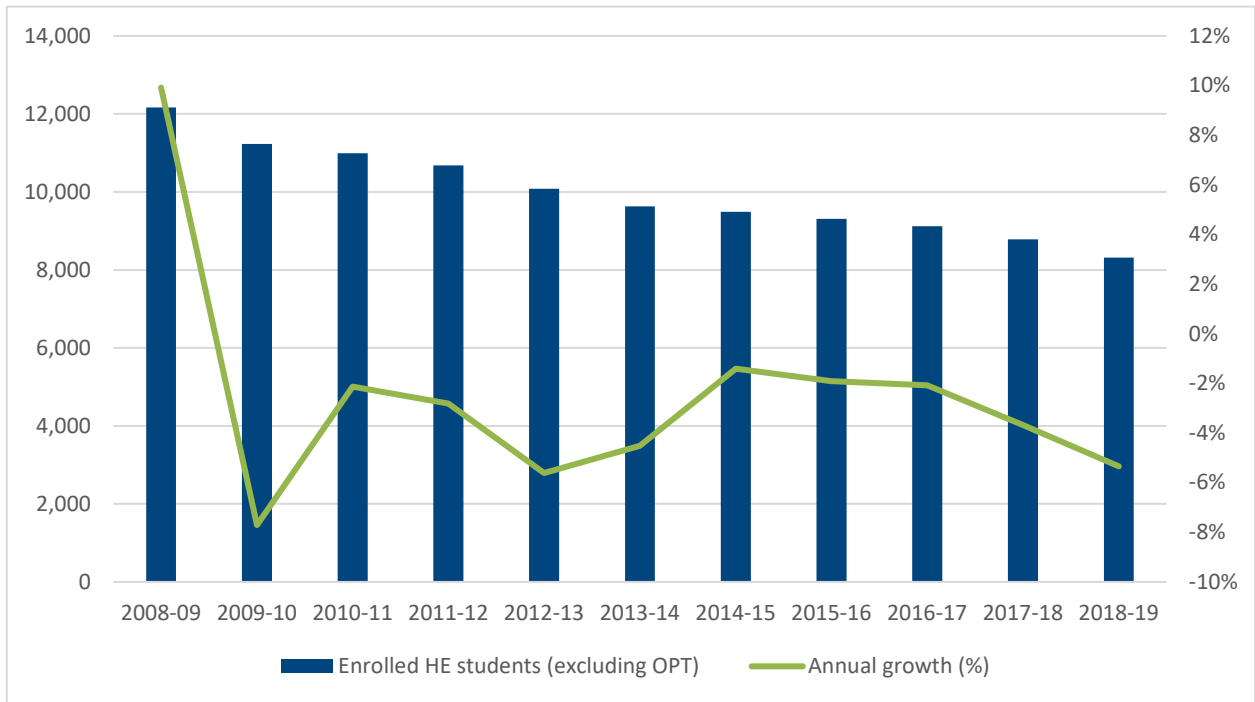
The most popular subject area for new enrolments at all levels was business and administrative studies, with 420 enrolments at both the undergraduate and postgraduate levels. Behind this was engineering and technology, followed by social studies.

Undergraduate enrolments have consistently increased over the last five years, and nearly all subject areas reflect this trend. The 420 enrolments in business and administrative studies was a 20 per cent increase year-on-year. The second most popular subject area was social studies with 190 enrolments, a 2.7 per cent increase from the previous year, followed by engineering and technology with 185 enrolments, a 15.6 per cent rise. Biological sciences and creative arts and design were also popular subjects, with biological sciences seeing consistent growth over the last five years.

Because postgraduate enrolments decreased year on year, many subject areas saw a corresponding decline. For example, engineering and technology enrolments decreased for the first time in five years, though only marginally, as did postgraduate enrolments in biological sciences, which declined by 13.3 per cent. Despite remaining as the most popular subject area for postgraduates, enrolments in business and administrative studies have declined overall for five years running. The only subject areas to buck this trend were computer science, in which enrolments increased by 36 per cent, architecture (6 per cent), education (7 per cent), physical sciences (20 per cent) and medicine and dentistry (56 per cent).

Competitor activity

Figure 7: Turkey HE enrolments in the US



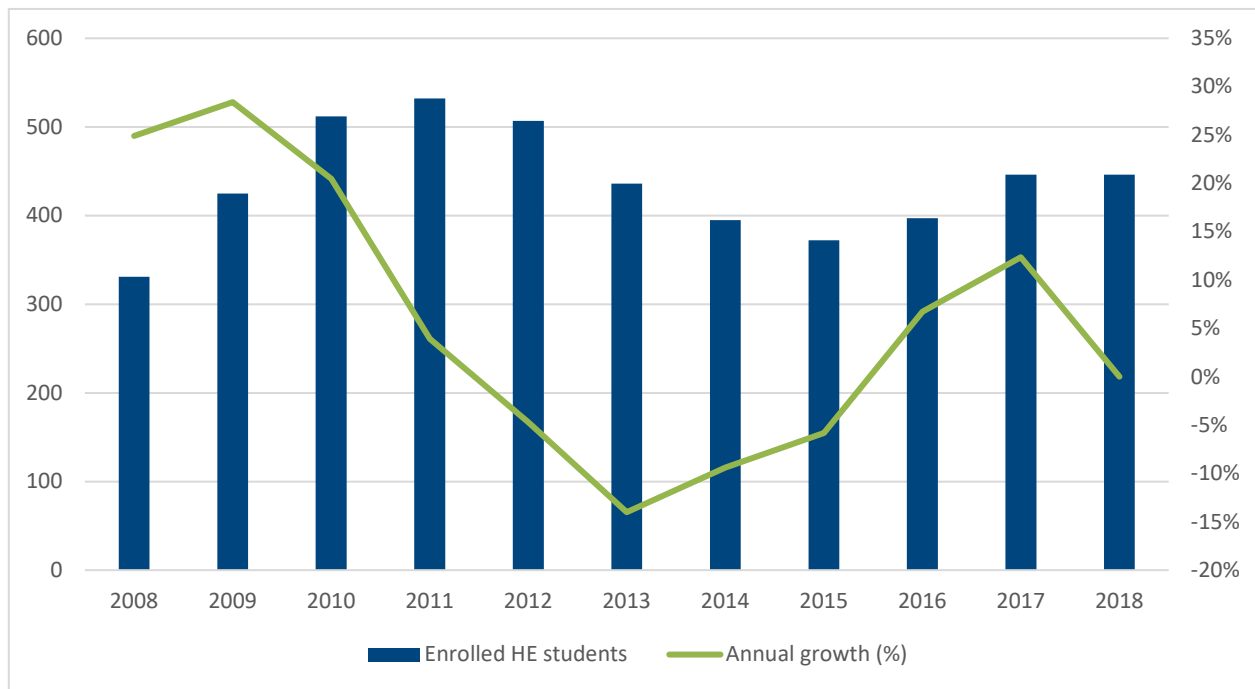
Source: IIE

Turkish HE enrolments in the United States have steadily declined over the last decade, from over 12,000 in 2008/09 to just over 8,000 in 2018/19. Despite this, the US remains the most popular destination for outbound Turkish HE students. In 2018, the visa approval rate for Turkish students was just 50 per cent. This low rate (compared with over 90 per cent approval rate for other destinations) could be a contributing factor to the dwindling interest in the US as a study destination.⁷⁷ In addition, the Trump Administration has introduced restrictions on the non-immigrant work visas (H-1B visa) that has increased the denial rate of these visas, making it harder for qualified Turkish students to find work and remain in the US. In 2018, the number of H-1B visa applications from Turkey reached a record low in 2018, a drop of 50 per cent from 2009 levels.⁷⁸

⁷⁷ [Checking in on Turkish outbound](#), *ICEF Monitor*, 14 November 2018.

⁷⁸ [H-1B Visa Program and Applications: Analysis](#), *VisaGuide.World*, 14 March 2019.

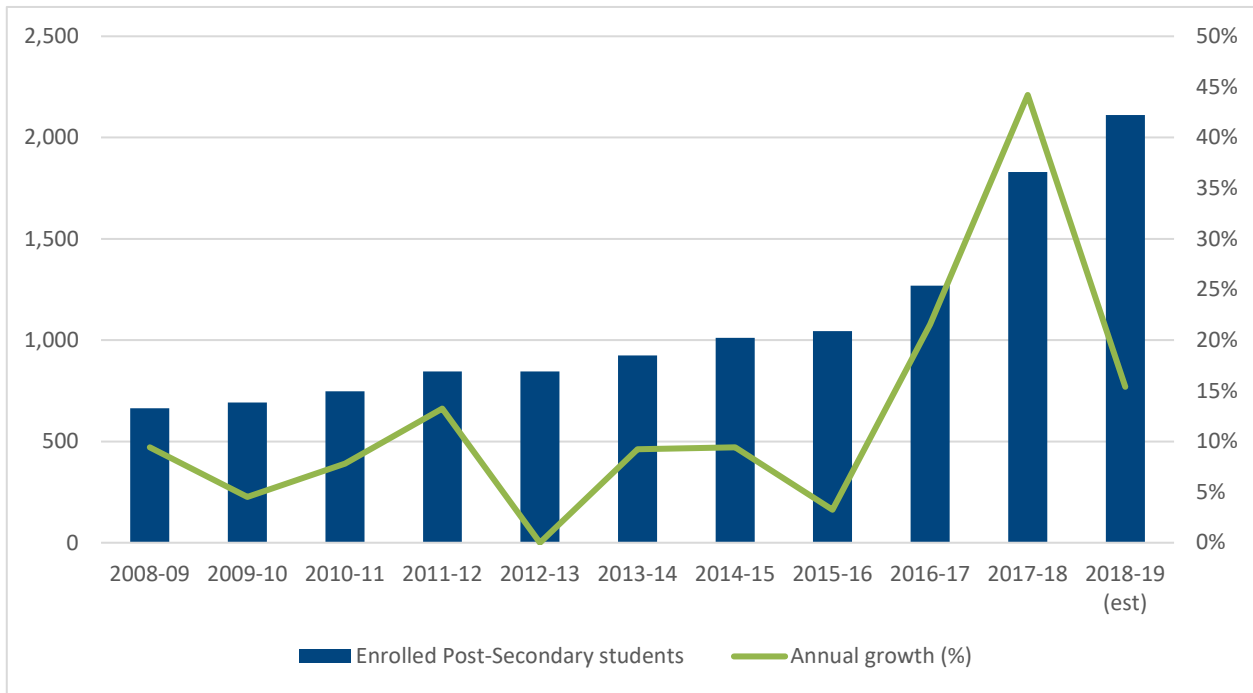
Figure 8: Turkey HE enrolments in Australia



Source: AusTrade

Australia is not a major destination for Turkish HE students and hosted just 446 students in 2018, level with the previous year. This is also a decline from a recent peak of 532 Turkish students in 2011, though higher than the 372 enrolments in 2015.

Figure 9: Turkey HE enrolments in Canada



Source: StatCan (to 2016-17); British Council estimate based on data from StatCan and Immigration, Refugees & Citizenship Canada (2017-18)

Canada has increased dramatically in popularity for outbound Turkish HE students. In 2008/09 there were just 663 Turkish students studying at Canadian HEIs. In 2018/19 there were an estimated 2,112 Turkish students in Canadian HEIs, an increase of more than 200 per cent. This is likely a direct result of Canada’s concerted effort to attract more international tertiary students and its relatively liberal post-study work visa regime.

Transnational education

Face-to-face UK TNE is not yet developed in Turkey and shows little sign of expanding. In 2018/19, only 30 of the 495 total UK TNE students in Turkey enrolled in face-to-face courses. Directly taught TNE enrolments fluctuated within a range 20 and 60 enrolments per year between 2014/15 and 2018/19. The remaining 465 enrolments were either on distance learning or the Oxford Brookes ACCA programmes.

Face-to-face TNE enrolments increased in 2018/19 by 50 per cent year-on-year, but with small enrolment numbers and no positive trend over the last five years the increase is not significant. Including distance learning and the Oxford Brookes ACCA programmes, UK TNE enrolments fell by 7.5 per cent in 2018/19 compared to the previous year.

There are no British overseas campuses in Turkey. There are however joint degree programmes with a handful of German universities and the binational Turkish-German University.⁷⁹

In 2016, Turkey published a 'Regulation on Joint Education and Training Programmes Between Turkish Higher Education Institutions and Higher Education Institutions Abroad.'⁸⁰ The regulation includes provisions concerning student admission, curriculum, examination, maximum duration, graduation requirements, tuitions fees and other issues related to joint diploma attainment. The domestic tuition fee to be paid by students in state universities must not be less or eight times more than the tuition fee determined annually by the Council of Ministers for evening education. Tuition fees at joint institutions are determined by the foreign HEI of the partnership.

Turkish students enrolling in joint degree programmes are required to take the standardised higher education foundations examination in addition to any requirements of the foreign HEI. The period of study and accumulated credits on joint programmes must not be less than that designated for each level of study in the National Qualifications Framework for Higher Education in Turkey. Higher education institutions intending to establish joint degree programmes must detail all mutual rights and obligations of both parties in their agreement and must present it to the Council of Higher Education for approval. The Council on Higher Education does not publish data on the number of joint degrees approved, but there are estimated to be several hundred such programmes in existence, though few appear to be with UK universities.⁸¹

International branch campuses are not permitted to establish in Turkey. However, the Turkish German University was established as a public university in Istanbul in 2013 under an intergovernmental agreement between Germany and Turkey, enrolling 1,800 students in 2019. Other forms of TNE such as franchise and validated programmes are not permitted in Turkey.

⁷⁹ [Germany's Road Towards Transnational Provision of Higher Education and its Footprint in China and Turkey](#), *German Academic Exchange Service*, February 2020. These numbers exclude students enrolled in programmes with the three main providers (Oxford Brookes University, the University of London and the Open University).

⁸⁰ [Regulation On Joint Education and Training Programmes Between Turkish Higher Education Institutions and Higher Education Institutions Abroad](#), *Council of Higher Education Turkey*, October 6 2016.

⁸¹ [TNE data collection systems: awareness, analysis, action](#), *British Council & DAAD*, May 2017.