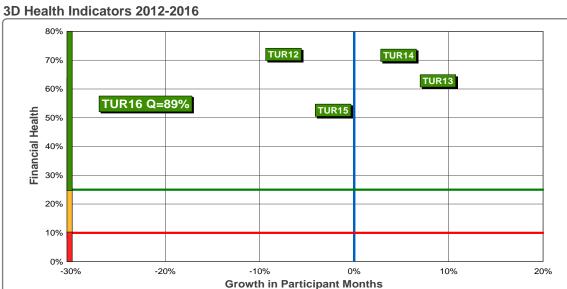
Updated Snapshot: Turkey (TUR)





KPIs Yr Growth Finances Quality 16 -27% 55% 89% 15 -5% 53% 92% 14 +2% 72% 88% 13 +7% 63% 87% 12 -10% 72% 90%

NPPR Status Yr Phase 16 No phase 15 No phase 14 No phase 13 No phase 10 No phase

Sending (Pax Mos) 2012-2016 2000 1000 0 2012 2013 2014 2015 2016 Long-term school-based Sentio Short-term Miscellaneous 2012 2013 2015 2016 2014 Long-term school-based 2,070 2,080 2,270 2,170 1,890 Sentio programs Started in 2014 10 0 0 18 15 Short-term (non-Sentio) 16 21 9 Miscellaneous (all others) 0 0

| Hosting (Pax Mos) 2012-2016 | | | | | | | | |
|-----------------------------|------------------------|---------|--------------|------|---------------|------|--|--|
| 3000 | | | | | | | | |
| 2000 | | | | | | | | |
| 1000 | _ | | | | | | | |
| 0 | | | | | | | | |
| | 2012 | 2013 | 2014 | 201 | 5 | 2016 | | |
| ■Lon | g-term school-based | Sentio | ■ Short-term | | Miscellaneous | | | |
| | | 2012 | 2013 | 2014 | 2015 | 2016 | | |
| Long-te | Long-term school-based | | 566 | 434 | 454 | 84 | | |
| Sentio programs | | Started | in 2014 | 6 | 3 | 0 | | |
| Short-term (non-Sentio) | | 84 | 78 | 62 | 56 | 0 | | |
| Miscella | neous (all others) | 12 | 59 | 80 | 50 | 10 | | |
| | Total | 507 | 703 | 582 | 563 | 94 | | |

Quality Assessment 2014-2016

Total

| | | Hostir | g CSE | | | Sendir | ng CSE | | | Overall | Bonus/ | Final |
|------------------------|----------|--------|-----------|------------------|-----|----------|-----------------|------------------|-----|---------------|---------|------------------|
| Quality | host fam | school | other stu | other nat fam | stu | nat fams | other host fams | other schools | PSE | Eval Score | Penalty | Quality Score |
| 2016 Network Total | 78% | 85% | 94% | 92% | 94% | 92% | 78% | 85% | 92% | 88% | -1% | 87% |
| 2016 (CSE16, PSE16-15) | 87% | | 94% | 87% | 92% | 79% | 72% | 89% | 97% | 87% | +2% | 89% |
| 2015 (CSE15, PSE15-14) | 81% | | 97% | 97% | 91% | 89% | 79% | 87% | 97% | 90% | +2% | 92% |
| 2014 (CSE14, PSE14-13) | 94% | 72% | 96% | 92% | 95% | 91% | 64% | 79% | 93% | 86% | +2% | 88% |

Key Financial Numbers in Effective USD 2013-2015

2,135

2,111

2.298

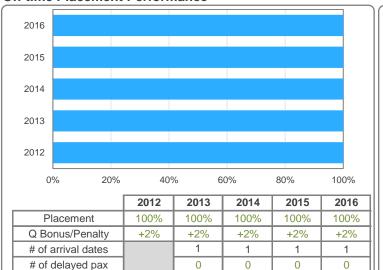
2,185

1.899

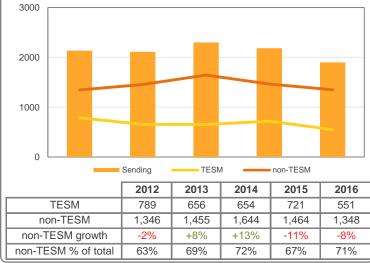
| Finances | Annual Turnover | % of total | Total Expenses | % of total | Net Results | % of unr. net assets | Current Assets | % of expenses | Unr. Net Assets | % of expenses |
|--------------------|--------------------|---------------|-------------------|---------------|-------------|----------------------------|-------------------|---------------|--------------------|---------------|
| 2015 Network Total | 183,453,070 | 100% | 178,003,152 | 100% | 5,449,918 | 8% | 116,051,027 | 65% | 70,545,137 | 40% |
| 2015 | 2,861,268 | 2% | 2,691,222 | 2% | 170,046 | 12% | 1,200,802 | 45% | 1,475,369 | 55% |
| 2014 | 3,158,127 | 2% | 3,134,633 | 2% | 23,494 | 1% | 1,329,099 | 42% | 1,648,850 | 53% |
| 2013 | 2,791,320 | 2% | 2,565,407 | 1% | 225,913 | 12% | 1,616,585 | 63% | 1,839,560 | 72% |

Updated Snapshot: Turkey (TUR)

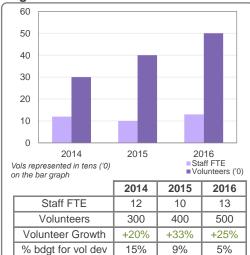
On-time Placement Performance



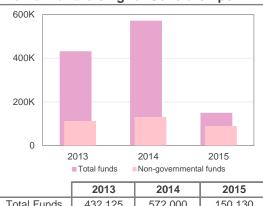
Country Diversification (Pax Mos Sending)



Organizational Structure

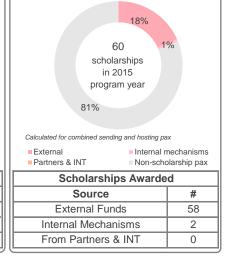


External Fundraising for Scholarships



| | 2013 | 2014 | 2015 |
|-------------|-----------|---------|---------|
| Total Funds | 432,125 | 572,000 | 150,130 |
| Non-gov | 113,000 | 131,000 | 90,000 |
| % of total | 26% | 23% | 60% |
| Non-gov Fun | ds Growth | +16% | -31% |

Scholarships Awarded (2015)



Education and ICL

| Learning Program Participants (started and completed) | | | | | | | |
|---|-------|------|------|--|--|--|--|
| Level W 1-3 QT | | | | | | | |
| Staff & Vols | 207 | 0 | 13 | | | | |
| % of Total | 40.4% | 0.0% | 2.5% | | | | |

W = What Every AFSer Should Know About Intercultural Learning, 1 - 3 = LP levels 1, 2, and 3; QT = Qualified Trainers

AFS Market Share and Competitor Landscape

| Estimated Market Share (Latest Year Available) | | | | | |
|--|------------------------|-----------------------|--|--|--|
| Outbound | Inbound non-fee paying | Inbound fee & non-fee | | | |
| | | | | | |
| 7.2% | N/A | 2.6% | | | |
| Non-fee paying - not paying trition and boated in volunteer best families: | | | | | |

Competitors

Fee paying = paying tuition and often hosted in paid host families

| Orientations | | | | | | | | |
|--------------|------------|------|------------|--------|----|----------|--------|------------|
| | PD | Α | PA | MS | PR | EOS | PoR | Other |
| Pax | • | • | • | • | | • | • | |
| Host Fams | | • | • | | | | | |
| Nat Fams | • | | | | | • | | |
| Sch/CPOs | | | | | | | | • |
| Attendance: | 0% (blank) | 1-25 | % O | 26-50% | | 51-75% 🗨 | 76-100 | % • |
| 1 | | | | | | | | |

PD = pre-departure, A = arrival, PA = post-arrival, MS = mid-stay, PR = pre-return, EOS = end-of-stay, PoR = post-return, Oth = other

| Sending (sc programs) | Hosting (sc programs) | | |
|---|--|--|--|
| ISE, Rotary, YFU | Rotary, YFU | | |
| Sending (18+ programs) | Hosting (18+ programs) | | |
| EVS, TOG, Erasmus+, European Union Consortiums, AIESEC, EF, ISE, others | EVS, TOG, Erasmus+, European Union Consortiums, TOMER, EF | | |
| | | | |

Educational System and Accreditation

| Educational Dystem and Accreditation | | | | | | |
|--------------------------------------|--|--|--|--|--|--|
| | Educational Designation & Credit Agreement | | | | | |
| | Designated as an Educational Entity | | | | | |
| | (Full) Credit Agreement | | | | | |
| | (Partial) Credit Agreement | | | | | |
| Ties to the World around AFS | | | | | | |
| | | | | | | |

| _ | the World diodila / ti o |
|---|--|
| | International Exposure and Collaboration with Others |
| | Joint project/new affiliation |
| | External forum or event |

| Market Environment | | | | | |
|--------------------------------------|---------------|--|--|--|--|
| Market Trends | and Forecasts | | | | |
| Shorter programs are in high demand. | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |