MECHANISMS FOR ENHANCING INTERNATIONAL COMPETITIVENESS IN THE DEVELOPMENT OF EDUCATIONAL SERVICES EXPORTS IN UZBEKISTAN

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Annotatsiya

Maqolada O'zbekistonda ta'lim xizmatlari eksportini rivojlantirishda xalqaro raqobatbardoshlikni oshirish mexanizmlari Milliy statistika qo'mitasi va Ta'lim sifatini ta'minlash milliy agentligining 2015–2026-yillardagi rasmiy ma'lumotlari asosida tahlil qilingan. Mamlakatdagi xorijiy talabalar soni 2015/2016-o'quv yilidagi 0,7 mingdan 2025-yilda 24 647 nafarga yetgani, 2025-yilda o'qish maqsadida kelganlar 39,7 ming nafarni tashkil etib, xorijga o'qishga ketganlar sonidan (28 954) birinchi marta oshib ketgani aniqlandi. Shu bilan birga, eksport tarkibida yuqori konsentratsiya saqlanmoqda: xorijiy talabalarning 53 foizi Hindiston fuqarolari, 63,5 foizi tibbiyot yo'nalishida, 95,5 foizi oltita hududda tahsil olmoqda. Muallif ta'lim eksportidan olinadigan yillik tushumni 131–148 mln AQSH dollari oralig'ida baholaydi va raqobatbardoshlikni oshirishning sakkiz yo'nalishli mexanizmlar tizimini taklif etadi.

Kalit so'zlar: ta'lim xizmatlari eksporti, xalqaro raqobatbardoshlik, xorijiy talabalar, oliy ta'limni internatsionallashtirish, akkreditatsiya, mintaqaviy ta'lim xabi.

Аннотация

В статье на основе официальных данных Национального комитета по статистике и Национального агентства обеспечения качества образования за 2015–2026 годы анализируются механизмы повышения международной конкурентоспособности при развитии экспорта образовательных услуг Узбекистана. Установлено, что контингент иностранных студентов вырос с 0,7 тыс. в 2015/2016 учебном году до 24 647 человек в 2025 году, а число въехавших с целью обучения (39,7 тыс.) в 2025 году впервые превысило число граждан, выехавших на учёбу за рубеж (28 954). Вместе с тем экспорт остаётся высококонцентрированным: 53% иностранных студентов – граждане Индии, 63,5% обучаются по медицинским направлениям, 95,5% сосредоточены в шести регионах. Годовая выручка от экспорта образования оценена в 131–148 млн долларов США; предложена система механизмов повышения конкурентоспособности из восьми направлений.

Ключевые слова: экспорт образовательных услуг, международная конкурентоспособность, иностранные студенты, интернационализация высшего образования, аккредитация, региональный образовательный хаб.

Abstract

This article examines mechanisms for strengthening the international competitiveness of Uzbekistan's educational services exports, drawing on official data from the National Statistics

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Committee and the National Agency for Quality Assurance in Education for 2015–2026. The stock of international students rose from 0.7 thousand in 2015/2016 to 24,647 in 2025, and in 2025 inbound study arrivals (39.7 thousand) exceeded outbound study departures (28,954) for the first time. The export base, however, remains narrow: 53% of international students are Indian nationals, 63.5% study medicine and 95.5% are concentrated in six regions. Annual export earnings are estimated at USD 131–148 million. The paper proposes an eight-component framework of competitiveness mechanisms covering regulation, quality assurance, diversification, branding, pricing, infrastructure, partnerships and statistical monitoring.

Keywords: export of educational services, international competitiveness, international students, internationalisation of higher education, accreditation, regional education hub.

1. Introduction

Higher education has become a tradable service in its own right. According to the OECD, more than 6 million tertiary students were studying outside their home country in 2023, and just over 5 million of them were enrolled in OECD member states [1]. Under the WTO General Agreement on Trade in Services, a foreign student paying tuition and living costs in the host country is classified as consumption abroad (Mode 2), so every enrolled international student generates a service export for the host economy [2]. Countries that once only sent students abroad now compete to receive them, and Central Asia is a clear example of that shift.

Uzbekistan entered this market late but is moving quickly. For most of the past decade it was mainly a source country: UNESCO data put the number of Uzbek citizens studying abroad at 150,500 as of 1 January 2023, the third-largest outbound population in the world after China and India [3]. Since 2023, however, the direction of flows has begun to reverse. In 2025, 39.7 thousand foreign nationals entered the country for study purposes, 58.2% more than a year earlier [4], while the number of Uzbek citizens travelling abroad to study fell by 19.3% to 28,954 [5].

The state has set explicit targets for this sector. In September 2025 the President stated that the number of international students should rise fivefold and education exports should reach USD 200 million [6]. The draft concept "Uzbekistan – a Regional Education Hub" targets 50,000 international students by 2030 and plans a "Study in Uzbekistan" platform, an annual international education forum from 2026 and education representative offices in South Asia, the CIS and the Middle East [7]. In July 2026 further targets were added: at least five universities in the global top 500 by 2030 and international accreditation of 100 degree programmes [8].

These targets make the question of competitiveness practical rather than abstract. Rapid growth in numbers does not by itself show that Uzbek universities can compete on quality, price and reputation in several markets at once. The purpose of this article is therefore to assess the current position of Uzbekistan's education exports using official statistics and to propose a set of mechanisms through which its international competitiveness can be raised in a sustained way.

2. Literature review

The study rests on three strands of research. The first treats internationalisation as an institutional and national process. Knight defines it as the integration of an international, intercultural or global dimension into the purpose, functions and delivery of post-secondary education, and separates internationalisation "at home" from cross-border provision [9]. Altbach and Knight show that income

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generation has become one of the strongest motives behind cross-border higher education, especially in systems where public funding does not keep pace with enrolment [10].

The second strand concerns competitiveness. Porter's diamond model explains a nation's advantage in an industry through factor conditions, demand conditions, related and supporting industries, and firm strategy and rivalry, with government and chance acting on all four [11]. Applied to higher education, the factors are academic staff, campuses and language capacity; demand is both domestic and foreign; related industries include housing, transport, health care and recruitment agencies. Marginson adds that global competition in higher education is shaped by a status hierarchy: lower-ranked systems compete mainly on price and access, while reputation is concentrated in a small number of research universities [13].

The third strand explains student choice. Mazzarol and Soutar's push–pull model holds that students leave because of limited places or quality at home and choose a destination by knowledge of the country, recommendations, cost, environment, geographic proximity and social links [12]. This model fits Uzbekistan closely: its main sending countries, India and Turkmenistan, face either a shortage of medical places or limited domestic capacity, while Uzbekistan offers lower fees, short flights and cultural proximity.

In the Uzbek literature, education exports are usually discussed as part of the regional services market. Raxmonqulova links the education services market to regional export potential and compares it with Australia, where international education is a major export industry [14]. Most domestic studies, however, describe growth in student numbers without measuring how concentrated that growth is or estimating its value in foreign currency. This article addresses that gap by combining structural indicators with an earnings estimate.

3. Methodology

The study uses secondary data only. Student stock and flow figures come from the National Statistics Committee of the Republic of Uzbekistan (stat.uz) and from the 2026 information-analytical review of the National Agency for Quality Assurance in Education, which reports the country, field and regional distribution of international students [15–18]. Comparative data for Kazakhstan, rankings data from QS, trade data and published tuition fees were used to place the Uzbek figures in context [19–25].

Two statistical series are kept apart throughout. The stock is the number of international students enrolled at the start of an academic year. The flow is the number of foreign citizens entering the country for study in a calendar period; it includes short courses and language study and is therefore larger than the stock.

Four indicators were calculated:

1. the internationalisation rate, the share of international students in total enrolment;
2. the mobility balance, the ratio of inbound study arrivals to outbound study departures;
3. concentration of the student base by source country (Herfindahl–Hirschman index, HHI, on country shares in percent) and by field and region;
4. annual export earnings, estimated as the student stock multiplied by an average tuition fee, with and without living expenditure.

The HHI was calculated as

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HHI = \sum_{i=1}^{n} s_i^{2}
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where s is the percentage share of country i. Because only the four largest source countries are reported separately, the result is a lower bound. Earnings were estimated with an average fee of USD

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3,500 a year, near the lower end of published medical tuition (USD 3,200–4,450 after the first year) [23], and living costs of USD 1,800–2,500 a year. The estimate is indicative, since the National Statistics Committee does not yet publish education services as a separate line in the services balance.

4. Analysis and results

4.1. Growth of the international student body

The number of international students has roughly doubled every two years since 2021. Uzbek universities enrolled 0.7 thousand foreign students in 2015/2016 and 12.5 thousand at the start of 2024/2025, about 18 times more [15]. The 2026 NQAAE review counts 24,647 students from more than 50 countries [16]. The average annual growth rate from 2021/2022 to 2025 was about 48%.

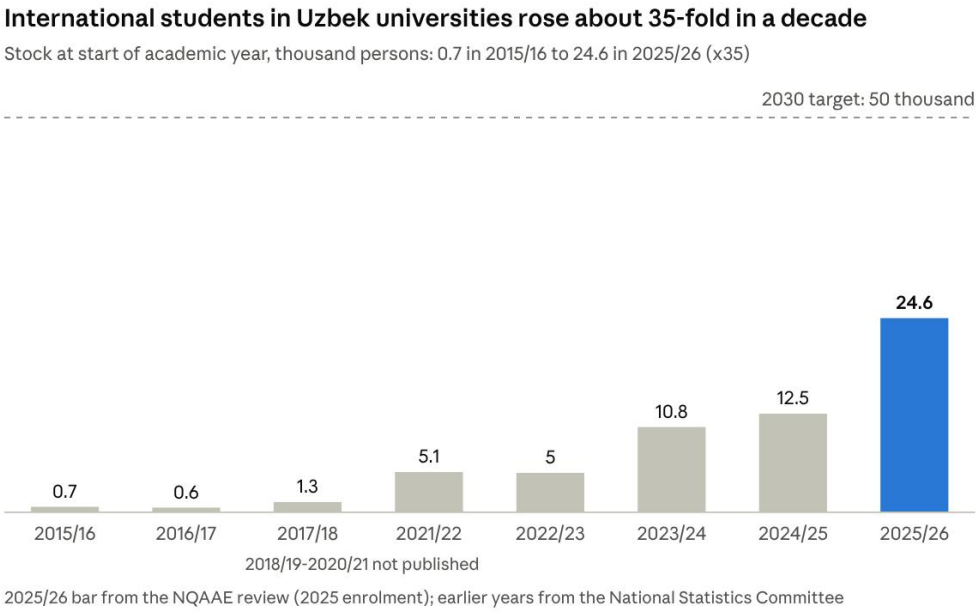

Figure 1. Sources: National Statistics Committee [15]; NQAAE review via Ta'lim xabarlari [16]; 2030 target: UzA [7]

The 2030 target of 50,000 students now requires growth of about 15% a year, well below the recent pace. Even so, international students make up only 1.6% of the 1,535.0 thousand students enrolled in 2025/2026 [17], against 5.2% in Kazakhstan [19] and about 7% on average across OECD countries [1].

4.2. Inbound and outbound flows

The mobility balance turned positive in 2025. Table 1 compares arrivals for study with departures of Uzbek citizens for study.

Indicator	2024	2025	2026, Jan–Aug/Sep
Foreign citizens arriving for study, persons	≈25,100*	39,700	29,548 (Jan–Aug)
Uzbek citizens leaving for study, persons	35,900	28,954	16,522 (Jan–Sep)
Mobility balance (inbound ÷ outbound)	0.70	1.37	–

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Table 1. Study-related mobility. Sources: [4], [5], [26], [27]. *Derived from the 2025 figure and its reported growth of 58.2%.

Arrivals in January–August 2026 were 2.1 times higher than a year earlier [26], while outbound study trips in January–September 2026 fell by 33% [27]. Uzbekistan is therefore turning from a net importer into a net exporter of higher education services.

4.3. Structure of the export base

The export base is narrow in three respects: source country, field of study and location. Table 2 summarises the 2026 NQAAE review [16].

Dimension	Group	Students	Share, %
Source country	India	13,060	53.0
Source country	Turkmenistan	4,884	19.8
Source country	Pakistan	1,165	4.7
Source country	Kazakhstan	1,129	4.6
Field	Medical universities	15,656	63.5
Field	Universities in global top-1000 rankings	4,846	19.7
Field	Social sciences and humanities universities	3,211	13.0
Region	Tashkent city	11,556	46.9
Region	Samarkand	4,382	17.8
Region	Bukhara	2,879	11.7
Ownership	State universities	22,685	92.0
Ownership	Private universities	1,468	6.0
Ownership	Branches of foreign universities	494	2.0

Table 2. Structure of international enrolment, 2025 (total 24,647). Source: NQAAE review [16]; shares calculated by the author.

The HHI on the four largest source countries alone is at least 3,244, well above the 2,500 threshold usually read as high concentration. Of the 15,656 students in medical universities, 14,070 (89.9%) come from South Asia [16]. Six regions host 95.5% of all international students, while Kashkadarya, Jizzakh and Karakalpakstan together host 111. Foreign branch campuses, numbering 30 in 2025/2026 [18], teach only 2% of international students, so they still serve mainly the domestic market.

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Partnerships show the same pattern. In 2025 Uzbek universities ran 374 joint programmes with universities in 21 countries, but about 80% of them were with Russian and Belarusian partners, and few involved top-500 institutions [7].

4.4. Reputation and comparison with Kazakhstan

Reputation is improving but remains the weakest link. Seven Uzbek universities entered the QS World University Rankings 2026, against two in the top 1,000 a year earlier; the best placed, TIIAME National Research University, ranked 469th [21]. Twenty-two institutions appeared in the QS Asia University Rankings 2026 [22].

Indicator	Uzbekistan	Kazakhstan
International students	24,647 (2025)	35,075 (2025/26)
Share of total enrolment, %	1.6	5.2
Medicine's share of international students, %	63.5	36.9
Foreign university branches	30	32
National target	50,000 by 2030	100,000 by 2029

Table 3. Uzbekistan and Kazakhstan compared. Sources: [7], [16–20]; shares calculated by the author.

Kazakhstan has a larger and more diverse international student body, and a target twice as ambitious. It also competes for the same students: India and Turkmenistan are the two largest source countries there too, and Uzbekistan itself sends 4,136 students to Kazakhstan [20]. Uzbekistan's main price advantage is real but small: published medical tuition is USD 3,200–4,450 a year [23], close to Kazakh levels.

4.5. Estimated export earnings

Education exports already earn a meaningful sum, though it is not yet recorded separately in the balance of payments. Table 4 gives the estimate.

Scenario	Students	Tuition, USD m	Tuition + living costs, USD m
2025 (actual stock)	24,647	86	131–148
2030 target	50,000	175	265–300

Table 4. Estimated annual export earnings. Assumptions: average tuition USD 3,500; living costs USD 1,800–2,500 a year. Calculated by the author.

The 2025 figure of USD 131–148 million equals about 1.5–1.7% of the USD 8.48 billion in services exports recorded in January–November 2025 [25]. If the 2030 target is met at current prices, earnings would exceed the official USD 200 million goal [6]. Growth in numbers alone, however, will not secure that result if the student base remains tied to one country and one field.

5. Discussion: a framework of competitiveness mechanisms

The results point to a growth model built on one advantage, low-cost English-medium medical training for South Asian students. In Porter's terms, Uzbekistan competes on factor costs, while demand conditions, supporting industries and reputation remain underdeveloped [11]. In Marginson's terms, it sits in the price-and-access tier of the global hierarchy [13]. That position can be profitable, but it is

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exposed: a change in Indian licensing rules for foreign medical graduates, or a price cut by Kazakhstan or Kyrgyzstan, would hit more than half of the student base at once.

Raising competitiveness therefore means widening the base on which the country competes. Table 5 sets out eight mechanisms, each linked to a weakness found in Section 4 and to a measurable indicator.

No.	Mechanism	Weakness addressed (evidence)	Main instruments	Indicator for 2030
1	Institutional and regulatory	Education exports lack a single legal and statistical status	A law or decree defining education export; simpler licensing for foreign providers; a fast student visa and post-study work option	Average visa processing time; number of post-study work permits
2	Quality assurance and recognition	Reputation is the weakest link (best QS place 469th)	ABET, AACSB and WFME accreditation; recognition agreements with India, Pakistan and Gulf states; NMC-compliant medical curricula	100 internationally accredited programmes; 5 universities in top 500
3	Market diversification	53% of students from India; HHI of at least 3,244	Recruitment in Bangladesh, Nepal, Sri Lanka, the Middle East, Africa and Afghanistan; country quotas in marketing budgets	Source-country HHI below 2,500
4	Programme diversification	63.5% study medicine	English-medium programmes in IT, engineering, agritech, green energy, tourism and business	Non-medical share above 50%
5	National branding and marketing	No single national education brand yet	"Study in Uzbekistan" portal; education offices abroad; annual international education forum; agent accreditation	Applications per place; share of students recruited without agents
6	Financial and pricing	A narrow price advantage over Kazakhstan	Value-based tuition tiers; scholarships for priority countries and fields; tax incentives for universities that earn foreign currency	Average revenue per student; export earnings in USD
7	Infrastructure and student experience	95.5% of students in six regions; dormitory shortage	Public–private partnership dormitories; international student offices; health insurance; support for regional universities	Students outside the six leading regions; satisfaction score

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No.	Mechanism	Weakness addressed (evidence)	Main instruments	Indicator for 2030
8	Partnerships and transnational education	80% of 374 joint programmes with Russia and Belarus; branches hold only 2% of international students	Joint and dual degrees with top-500 universities; "2+2" and "3+1" models; branches recruiting abroad	Share of programmes with top-500 partners; international students at branches

Table 5. Mechanisms for enhancing the international competitiveness of education exports. Compiled by the author.

The mechanisms are interdependent. Diversification (mechanisms 3 and 4) is not achievable without recognition (2), because students in new markets choose a degree that their own labour market accepts. Branding (5) spends money to little effect if the student experience (7) produces poor recommendations, which the push–pull model identifies as a leading pull factor [12]. Monitoring ties the system together: without a separate line for education services in the balance of payments, the USD 200 million target cannot be checked against actual earnings.

Regional universities deserve particular attention. Bukhara already hosts 2,879 international students, 11.7% of the national total [16]. Regional hubs such as Bukhara and Samarkand can offer lower living costs and a cultural-heritage setting, which supports a differentiated offer rather than competition with Tashkent on the same terms.

6. Conclusion and recommendations

Uzbekistan has become a net exporter of higher education services. International enrolment reached 24,647 in 2025, about 35 times the 2015/2016 level, and inbound study arrivals exceeded outbound departures by 37% in 2025. Estimated annual export earnings of USD 131–148 million already approach the official USD 200 million target.

The competitiveness behind this growth is narrow. It rests on price, on one field and on one source country, while the internationalisation rate (1.6%) remains a third of Kazakhstan's and a fraction of the OECD average. The main risk is therefore not slower growth but a sudden external shock to a concentrated student base.

The study leads to five recommendations:

1. Introduce a separate line for education services in the national services balance and publish annual export earnings in US dollars.
2. Make international accreditation (WFME for medicine, ABET for engineering, AACSB for business) a condition for state support of export-oriented programmes.
3. Set a diversification target alongside the 50,000-student goal, for example no single source country above 35% and non-medical fields above 50% by 2030.
4. Launch the "Study in Uzbekistan" platform as a single entry point for applications, visas and accommodation, and back it with education offices in priority markets.

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5. Direct dormitory investment and recruitment support to regional universities in Bukhara, Samarkand, Khorezm and Fergana to spread the economic benefits beyond Tashkent.

Further research could use university-level data to estimate how accreditation and ranking positions affect tuition levels and applicant numbers, which would allow the mechanisms proposed here to be tested empirically.

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