



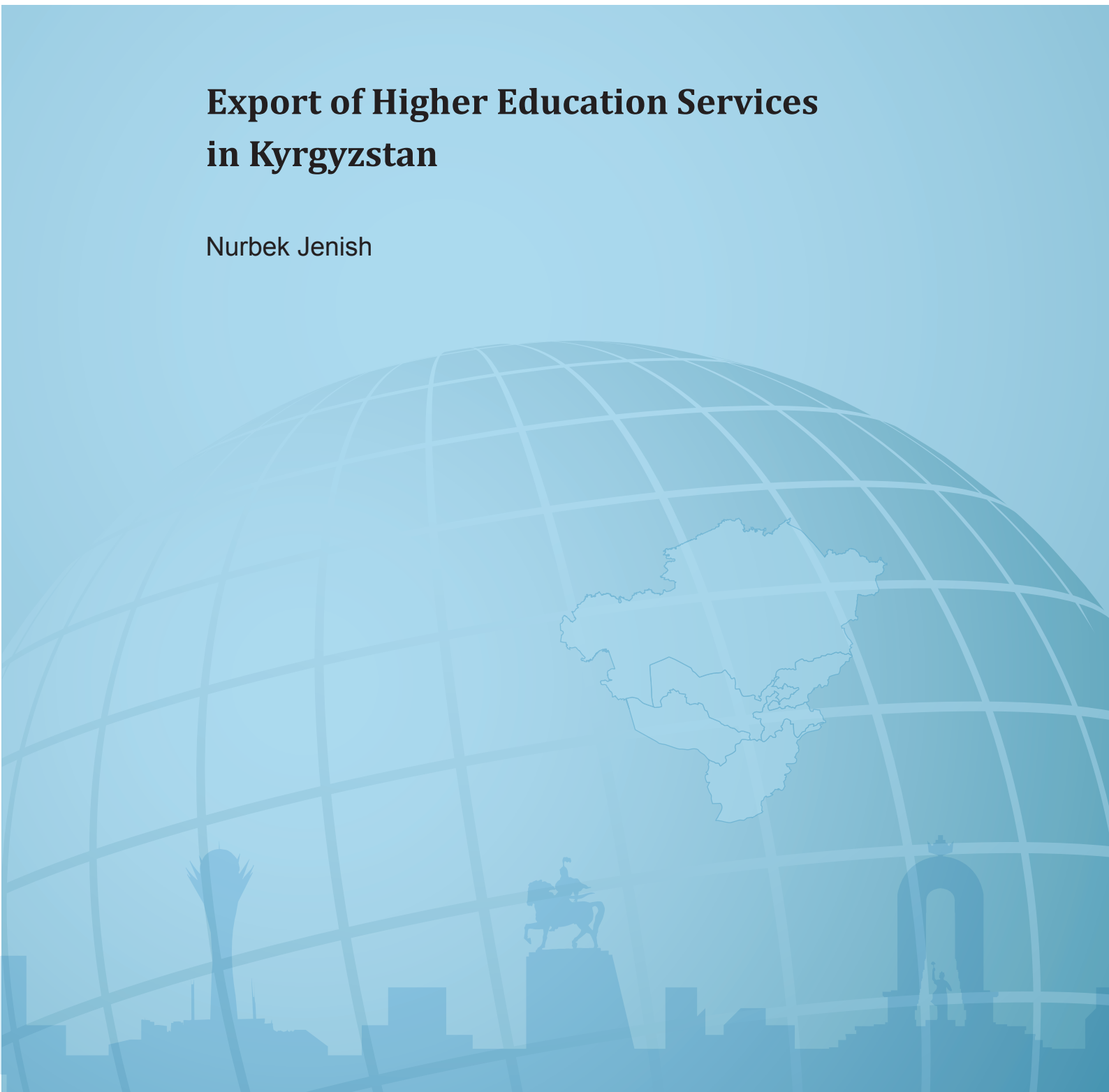
UNIVERSITY
OF CENTRAL ASIA

GRADUATE SCHOOL OF DEVELOPMENT

Institute of Public Policy and Administration

Export of Higher Education Services in Kyrgyzstan

Nurbek Jenish



WORKING PAPER NO.7, 2012



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Abstract

The paper examines recent developments in the international higher education sector in Kyrgyzstan. It attempts to (i) provide an explanation for why the country has outperformed its Central Asian (CA) neighbours and become a regional leader in recruiting international students, and (ii) assess the impact of international students on the Kyrgyz economy. Surveys, focus group discussions and in-depth interviews with 100 international students from 10 different countries, including Afghanistan, were conducted. Findings suggest that the main factors that led to the increasing number of foreign students in Kyrgyzstan are: the relatively low cost of education and living; the perceived good quality of education; soft university entry requirements; proximity to home countries; the opportunity to study in different languages; and the availability of donor funded scholarships. There is room for further expansion of cooperation between Kyrgyzstan and Afghanistan in the area of higher education by attracting more Afghan students to the country. Based on survey data on foreign student expenditures, international students contributed 0.25% of gross domestic product in 2011.

Keywords

Kyrgyzstan, Export of Higher Education

JEL Codes: F19, I23

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This paper is part of research being conducted for the “Regional Cooperation and Confidence Building in Central Asia and Afghanistan” (RCCB) project supported by the Government of Canada, Department of Foreign Affairs and International Trade.

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ISSN: 2617-9245

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1. Introduction¹

The first decade of the new millennium saw a drastic increase in the number of internationally mobile tertiary education students across the world.² According to the United Nations Educational, Scientific and Cultural Organization (UNESCO), there were 1.68 million internationally mobile students (hereinafter referred to as international or foreign students) in 1999, and by 2009, that number had doubled, reaching 3.37 million. Developments over the same period led to changes in the main destinations for international students in the late 1990s. The major exporters of tertiary education, including the United States (USA) and the United Kingdom (UK) experienced declines either in international enrollment or in the enrolment growth rates. In 1999, the USA, the UK, Australia and Canada recruited 50% of the world's international students. By 2009, that figure had dropped to 41%, though recruitment had increased in absolute numbers during the same period (Table 1). Tightened visa requirements, following the events of September 11, 2001, may have affected international student enrollment in universities in these countries. However, the emergence of new players, such as Japan, New Zealand, Malaysia, Singapore and China, as well as significant changes in the capacity and infrastructure of national higher education systems across the world, also explain these developments.

Table 1. Enrollment of tertiary international students, selected countries

	1999	2006	2007	2008	2009
USA	475,169	584814	595,874	624,474	660,581
Canada	40,033	75546	68,520	68,520	92,881
UK	225,722	330078	351,470	341,791	368,968
Australia	105,764	207264	211,526	230,635	257,637
Worldwide tertiary international students	1,680,000	2,652,068	2,800,470	2,965,840	3,369,242

Source: UNESCO, Global Education Digest, various issues

Why do countries strive to attract foreign students? The export of education services in developed countries generates billions of dollars through tuition, fees, accommodation and discretionary spending, creates new jobs and generates additional government revenue. According to United Nations Service Trade data, education-related expenditures by foreign students studying in the USA constituted almost \$18 billion in 2008.³ The proceeds from exporting education in other developed countries were also substantial (see Table 2).

¹ The author would like to thank Dr. Charles Becker, Myrza Karimov and Dr. Richard Hopper for their valuable comments.

² Internationally mobile students refers to students who have crossed a national border for the purposes of education, and who are enrolled outside their country of origin.

³ Extended Balance of Payments Statistics (EBOPS) code 242 defines education-related expenditure as the total expenditure by students. EBOPS also reports the value of provided education services (code 895) for some countries, which are purely education-related services. Though, this number is large in absolute terms, it remains a small share of total exports of goods and services (0.1% in 2008).

Table 2. Education-related expenditures by international students (USD)

	2006	2007	2008
USA	14,658,576,251	15,967,608,229	17,988,564,219
Canada	1,949,563,531	2,257,164,124	2,600,375,235
UK	8,541,107,640	10,587,862,712	10,735,298,152
Australia	5,888,409,298	8,555,905,759	10,596,534,454

Source: UN Service Trade database

The total economic impact is much larger due to the multiplicative nature of direct expenditures and indirect expenditures, such as those associated with visits of foreign students' families. It is estimated that international students directly contributed over USD11.7 billion, and around USD10.5 billion in indirect contributions, to the Australian economy, representing over 126,000 full-time jobs.⁴ Finally, attracting international students has a wider socio-economic rationale; developed countries are looking to attract foreign skilled labour to supplement their decreasing and ageing population.⁵

In recent years, there have been an increasing number of reports and studies analysing international education developments in different countries, and attempting to assess the economic benefits. However, the examination of international education sector developments in developing countries has received little attention. This may be partially due to the relatively smaller amounts of revenue associated with international education in developing countries. However, in the last ten years, some developing countries have made significant progress in attracting large number of international students and substantially increased international education-related revenues. For example, Malaysian exports of education-related services almost quadrupled from USD68 million in 2002 to USD231 million in 2008.⁶ This paper attempts to contribute to the existing literature by examining developments in the international higher education sector in the Kyrgyz Republic. Despite relatively small revenues generated by the sector, Kyrgyzstan recently emerged as a leader in Central Asia⁷ in attracting foreign students, and the ratio of international to total tertiary enrollment in the country exceeded that of the USA during 2007-2009, and Australia in 2007 (Table 3).

Table 3. International tertiary students as percent of total tertiary enrolment

Country	2007	2008	2009
USA	3.4	3.4	3.5
UK	14.9	14.7	15.3
Australia	9.8	20.6	21.5

⁴ Australian Council for Private Education and Training, *The Australian Education Sector and the Economic Contribution of International Students*, (East Melbourne: ACPET, April 2009). <http://globalhighered.files.wordpress.com/2009/04/theaustralianeducationsectorandtheeconomiccontributionofinternationalstudents-2461.pdf> (accessed January 12, 2012)

⁵ Line Verbik and Veronica Lasanowski, *International Student Mobility: Patterns and Trends*, (New York: World Education Services, last modified October 2007), <http://www.wes.org/educators/pdf/StudentMobility.pdf> (accessed January 16, 2012).

⁶ United Nations Service Trade database.

⁷ In this paper, Central Asia includes Kyrgyzstan, Kazakhstan, Tajikistan and Uzbekistan.

Country	2007	2008	2009
Kyrgyzstan	11.4	8.6	6.9
Kazakhstan	1.5	1.6	1.7
Tajikistan	1.9	1.9	2.0

Source: Author's calculations based on UNESCO, *Global Education Digest (various issues)* and data from National Statistics Committee of the Kyrgyz Republic.

The objectives of the paper are twofold. First, it examines and discusses the underlying rationale behind recent developments in the international higher education sector in Kyrgyzstan. Second, the paper tries to assess the economic impact of the export of higher education services.

Section 2 reviews the literature on the evaluation of economic impact of international students. Section 3 provides an overview of recent economic and trade developments in Kyrgyzstan. Section 4 provides an overview of the higher education sector in Kyrgyzstan and analyzes the profile of foreign students and enrolment trends. Section 5 discusses the structure and findings of a survey of international students. Section 6 assesses the economic impact of internationalization of higher education in the country. Finally, Section 7 offers conclusions and policy implications.

2. Literature review

The existing literature devoted to cross-border higher education is divided into two groups. The first examines the evolution and recent developments in the sector of international higher education in different countries and regions. These studies also analyze drivers and rationales behind internationalisation. The second focuses on an assessment of the economic impact of exporting education services.

The Organisation for Economic Co-operation and Development (OECD) conducted a thorough analysis of key developments, trends and driving forces behind intensified post-secondary cross-border education in North America, Europe and Asia-Pacific.⁸ The study found that while geo-political factors played an important role in the development of internationalisation in Europe, economic rationale has gained more importance. The latter includes both short-term benefits (direct institutional income through fee-based systems) and long-term benefits (enhancement of international competitiveness of the institutions). It has been argued that in at least 40 % of European countries, the internationalisation of post-secondary education was partly driven by economic rationale related to international competitiveness of higher education institutions and/or to the export of higher education services.⁹ The study found a combination of different rationales driving internationalisation in the USA. The main underpinnings are academic (strengthening of education, enhancing the quality of teaching),

⁸ Organization for Economic Co-operation and Development, *Internationalization and Trade in Higher Education: Opportunities and Challenges*, (Paris: OECD, 2004).

⁹ Stéphanie Caillé, Jean Gordon, Sander Lotze and Marijk van der Wende, "The Implementation of SOCRATES at the National Level," in Erasmus in the *SOCRATES Programme. Findings of an Evaluation Study*, ed. Ulrich Teichler, 189-201. (Bonn: Lemmens, 2002).

economic and commercial (institutional income, contributing to the local economic development and competitiveness). Additionally, North America has been a magnet for foreign students in view of high quality education and ample opportunities after graduation. The report concludes that student mobility has been driven by the institutions themselves in this region. In contrast, the study found that mobility in Asia-Pacific was driven by increased demand as economic conditions in the region have substantially improved.

A more recent analysis of patterns and trends in international higher education conducted by Verbik and Lasanowski suggests that the global landscape of international tertiary education has changed.¹⁰

Though the USA, the UK and Australia remain the major players in the market (followed by Germany and France), recently, countries such as Singapore, Malaysia and China, have attracted increasing numbers of foreign students. In the latter two countries, the spread of English as a language of instruction has contributed to their growing popularity as an overseas student destination. Altbach and Knight argue that developing countries seek to attract international students to improve the quality and cultural composition of their student body to gain prestige as well as to earn income.¹¹

Another strand of literature focuses on the assessment of economic benefits of exports of higher education services in different countries. Roslyn Kunin and Associates found that international students in Canada spent more than USD6.1 billion or 0.4% of gross domestic product (GDP) on tuition, accommodation and discretionary spending; created over 83,000 jobs and generated over USD273million in government revenues.¹² They further argue that an additional CA\$285 million per year can be attributed to tourism by international students and their family and friends. Overall, the total amount of international students' expenditures in 2008 exceeded Canadian exports of coniferous lumber (USD4.78 billion) and coal (USD5.69 billion). The authors conclude that the economic benefit of international students studying in Canada is substantial.¹³

A study commissioned by the Australian Council for Private Education and Training estimates that international students contributed more than USD11.7 billion (about 1.2% of GDP) directly and about USD10.5 billion (around 1% of GDP) indirectly to Australian economy in 2008, which is equivalent to over 126,000 full time employees.¹⁴ In calculating the benefits, the authors used the Tourism Research Australia's International Visitor Survey to determine the number of visitors who reported education as their purpose of travel and examined their spending patterns.¹⁵

¹⁰ Verbik and Lasanowski, (2007).

¹¹ Philip G. Altbach and Jane Knight, "The Internationalization of Higher Education: Motivations and Realities," *Journal of Studies in International Education* 11, 2007: 290-305. doi 10.1177/1028315307303542

¹² In 2008, the annual average exchange rate was CAD1.06 per one USD.

¹³ Roslyn Kunin & Associates, *Economic Impact of International Education in Canada*, (Vancouver: RKA, last modified July 2009), http://www.international.gc.ca/education/assets/pdfs/RKA_IntEd_Report_eng.pdf (accessed January 18, 2012)

¹⁴ In 2008, the annual average exchange rate was AUD1.192 per one USD.

¹⁵ ACPET, (2009)

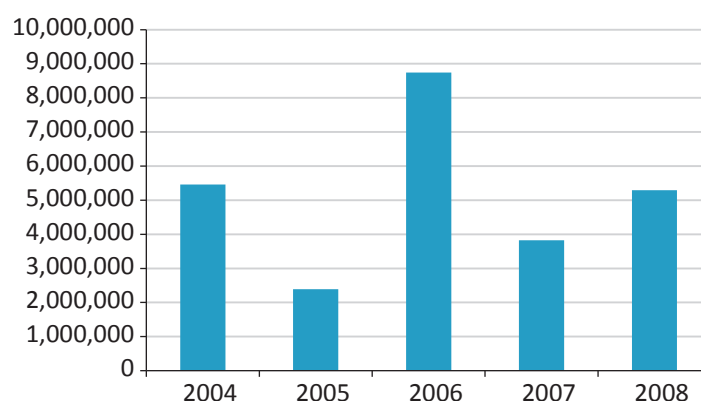
The Association of International Educators estimates that international students studying in the USA in the 2009-10 academic year paid tuition and fees in the amount of USD13 billion. Taking into account financial aid, and adding living expenses for students and their families, they estimate that foreign students and their dependents contributed nearly USD19 billion (around 0.13 % of GDP) during the 2009-2010 academic year.¹⁶

In the 2007-08 academic year, international students studying in New Zealand contributed around USD1.5 billion (about 1.1% of GDP).¹⁷ The total economic impact, including the “multiplier effect” is estimated at around USD2.8 billion. It is also estimated that the total employment effect attributable to foreign student expenditure was around 32,400 full time equivalent positions.¹⁸

3. Export of higher education services in Kyrgyzstan

Kyrgyzstan exports education services in the form of higher education, language training programmes and primary and secondary school education. Figure 1 provides the dynamics of foreign exchange earnings associated with education exports from 2004-2008.¹⁹ In absolute terms, the monetary value of education-related expenditures (tuition) by foreigners represented substantially smaller amounts (peaking at US\$8.7 million in 2006), compared to the main education exporter countries. However, the country outperforms its immediate neighbors Kazakhstan and Tajikistan in both absolute and relative terms. In relative terms, the country’s performance in 2008 is comparable to that of the USA and Canada (Figure 2).

Figure 1. Export of education services (USD)



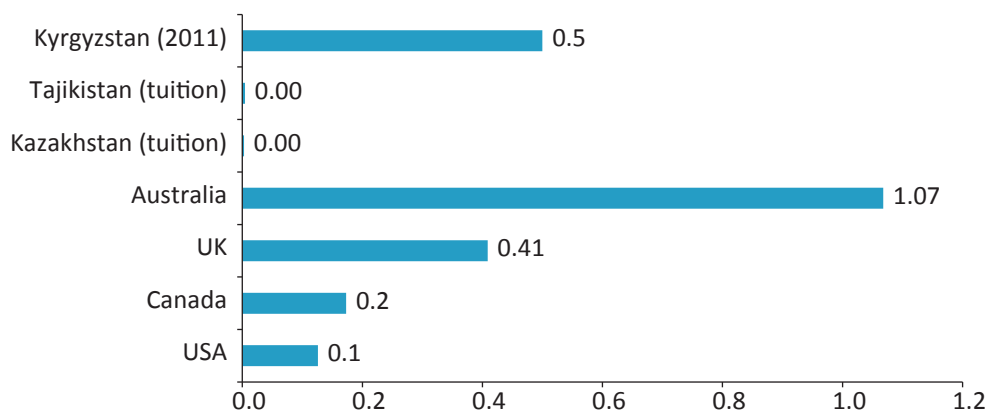
Source: UN Service Trade database

¹⁶ Association of International Educators, *The Economic Benefits of International Education to the United States for the 2009-10 Academic Year: A Statistical Analysis*, (New York: NAFSA, November 2010) <http://www.nafsa.org/publicpolicy/default.aspx?id=23158> (accessed 15 January 2012).

¹⁷ Infometrics, NRB and Skinnerstrategic, “The Economic Impact of Export Education,” Report commissioned by *Education New Zealand Trust and Ministry of Education*, (Wellington: Education New Zealand Trust and Ministry of Education, 2008) http://www.educationcounts.govt.nz/_data/assets/pdf_file/0007/35368/EconomicImpactReport08.pdf (accessed on January 10, 2012)

¹⁸ In 2008, the annual average exchange rate was NZ\$1.423 per one USD.

¹⁹ Choice of the period is dictated by the availability of data.

Figure 2. Export of education services, 2008, (% of GDP)

Source: UN Service Trade database, World Development Indicators

Note: Except for Kyrgyzstan, Tajikistan and Kazakhstan, export of education services includes associated expenditures, including food and accommodation.

Additionally, foreign exchange inflow associated with education exhibited volatility in Kyrgyzstan, due to:

- Continuous shifts in the number of international tertiary students by country. In 2004, the top five consumers of Kyrgyz education services (in terms of descending education expenditures) were Turkey, Uzbekistan, Kazakhstan, USA, the Russian Federation and Pakistan. In 2008, the top five consumers were Uzbekistan, Pakistan, Turkmenistan, India and China (Table 4 and Figure 3);
- Changing demand for Russian and, to a lesser extent, Kyrgyz language courses. Demand for language courses peaked in 2004, due to the military contingent at the Manas air force base, and
- Negative shocks that decreased enrollment of tertiary students. The 2005 and 2010 socio-political crises led to a change in government and resulted in instability, which consequently decreased the number of foreign student enrollment.

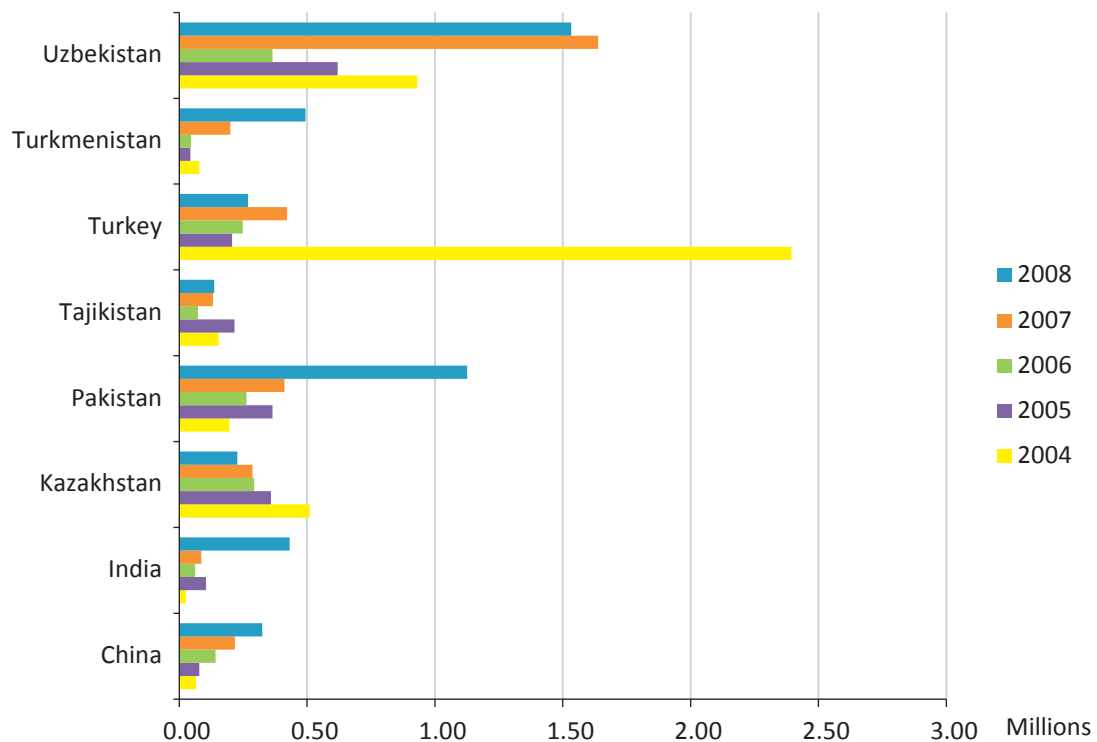
Table 4. The top consumers of Kyrgyz education services (in descending order)

	2004	2005	2006	2007	2008
1	Turkey	Uzbekistan	Russian Federation	Uzbekistan	Uzbekistan
2	Uzbekistan	Pakistan	Uzbekistan	Turkey	Pakistan
3	Kazakhstan	Kazakhstan	Kazakhstan	Pakistan	Turkmenistan
4	USA	Tajikistan	Pakistan	Kazakhstan	India
5	Russian Federation	USA	Turkey	China	China
6	Pakistan	Turkey	USA	Turkmenistan	Turkey
7	Tajikistan	India	Afghanistan	Tajikistan	Kazakhstan

With the exception of 2004, proceeds from language courses and from primary and secondary school education constituted a relatively small portion of all education services. Most services accessed by international students were in higher education. In monetary terms, in 2008 Uzbekistan was the largest consumer of higher education in Kyrgyzstan, sending over 15,000 students in the 2007-2008 academic year and over 10,000 in 2008-2009 to study in

Kyrgyzstan.²⁰ Students from Uzbekistan paid more than USD1.5 million for their education in 2008 (Figure 3). During the same period, there was a sharp increase in the number of tertiary students from Pakistan and India. The associated foreign exchange revenues increased from USD85 thousand in 2007 to USD430 thousand in 2008 from Indian students, and from USD411 thousand in 2007 to over USD1.1 million in 2008 from Pakistani students.

Figure 3. Major importers of Kyrgyzstan's education services (USD millions)



Source: UN Service Trade database

4. Higher education sector and international students

This section provides an overview of the developments in the higher education sector of Kyrgyzstan, and an analysis of the flows and composition of international students that study in higher education institutions in Kyrgyzstan.

4.1 Overview of the higher education sector in Kyrgyzstan

Higher education in Kyrgyzstan is offered by higher professional education institutions (HPEI)²¹, which comprise universities, academies, institutes and colleges. HPEIs may have branches, departments, research and scientific laboratories, departments of graduate and post-graduate

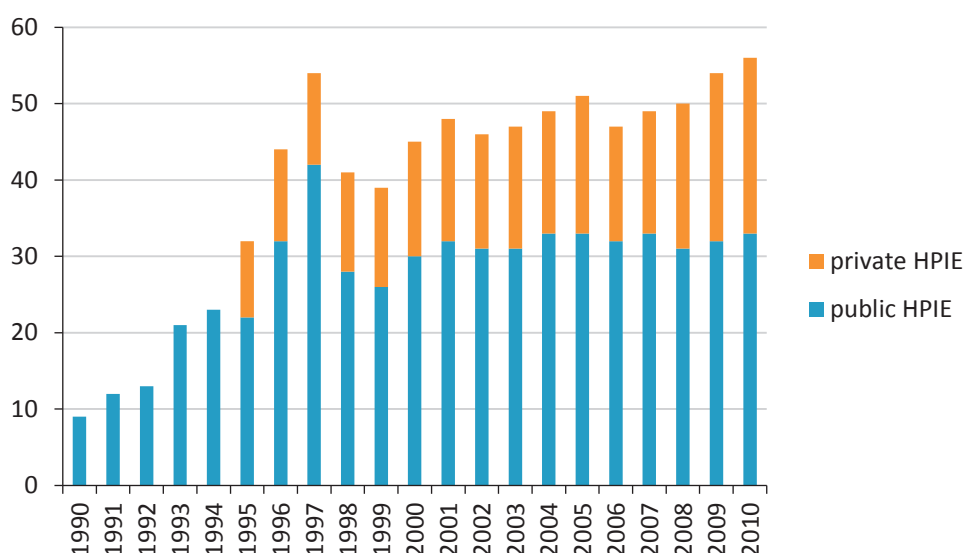
²⁰ The National Statistics Committee of the Kyrgyz Republic would only provide university-level aggregate data, so it is unclear what proportion were full-time students.

²¹ HPEI is a legal entity that offers higher and professional education.

studies and other organisational subunits. Their programmes are offered on a full-time and part-time basis, and could include evening study and distant learning programmes.²²

Before the collapse of the USSR, in 1990, there were ten HPEI in Kyrgyzstan, all of which were state-owned. Eight of the ten were located in the capital Bishkek, one was in the southern capital of Osh city and the other, was a teacher training institute in Karakol (former Prezhvalsk). Following the collapse of the USSR, the number of HPEI increased dramatically, reaching 56 in 2010 (Figure 4). While the majority of HPEIs are still concentrated in Bishkek and Osh city, new institutions emerged all across the country (Figure 5 and Table A1). At the same time, the number of private entities also substantially increased, from 10 in 1995 to 23 in 2010. The increase in the number of HPEIs was mainly driven by the increasing demand for higher education and increased budgetary financing of the sector (Figure A1 in Appendix).²³ The number of students grew from around 50,000 in the 1992-93 academic year to over 230,000 in 2010-11.

Figure 4. HPEIs in Kyrgyzstan, 1990-2010



Source: National Statistics Committee of the Kyrgyz Republic

The explosion of HPEIs was accompanied by a deterioration in the quality of education. This was due to relatively weak national and institutional governance in higher education, that allowed low-quality HEIs to be established, including many small private institutions whose sole source of revenue was student fees.²⁴ Other challenges include the absence of systematic and consequential educational policy, ineffective quality assurance systems, low quality of staff and material resources, poor connections between universities and the labour market, corruption, and insufficient development of research capacity at HPEIs.²⁵

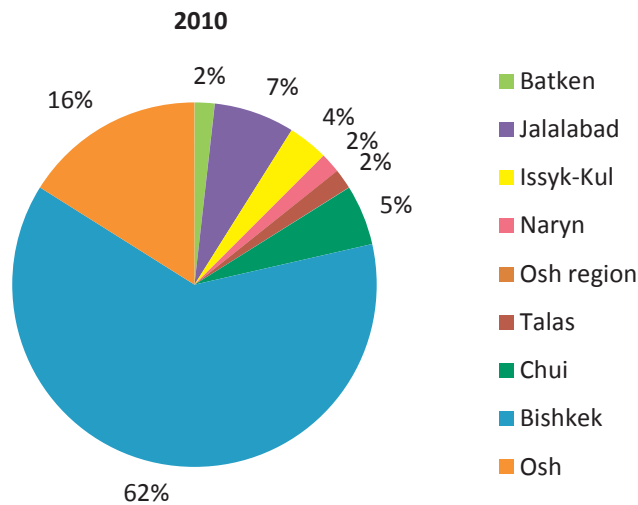
²² Please see Tempus, Higher Education in Kyrgyzstan, (Brussels: European Commission, October 2010). http://eacea.ec.europa.eu/tempus/participating_countries/reviews/kyrgyzstan_review_of_higher_education.pdf (accessed January 25, 2012) for a detailed overview of the higher education sector.

²³ The increased budgetary allocation was only to finance moderate increases in student stipends and teacher salaries. The government does not finance operational costs of public universities, including utilities, maintenance, books and other teaching materials.

²⁴ Geoffrey D. Wilmoth, Central Asia's Future Role in International Higher Education, 2012, <http://www.wilmoth.com.au/publications/WilmothNazUnivPaper.pdf> (accessed January 16, 2012),

²⁵ Tempus, (2010).

Figure 5. HPEIs by region, 2010

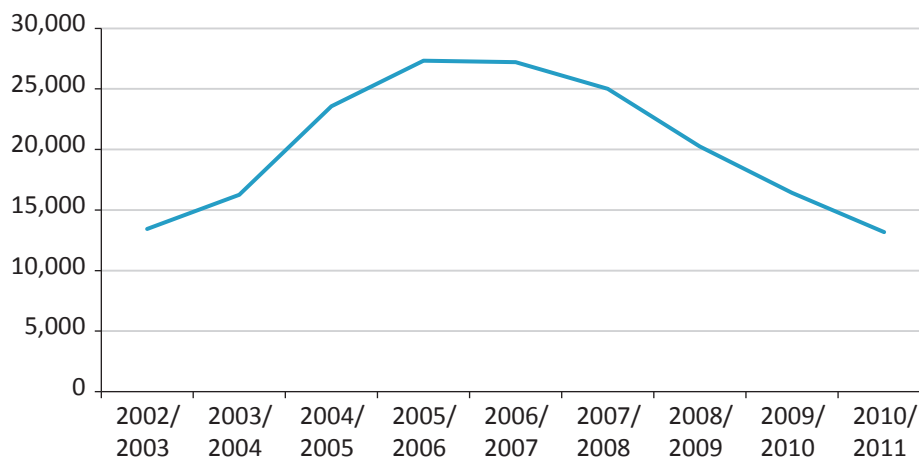


Source: National Statistics Committee of the Kyrgyz Republic

4.2 Profile of international students and enrolment trends

Despite deficiencies in the higher education sector, Kyrgyzstan has attracted a large number of international students in recent years (see Figure 6).

Figure 6. International student enrollment in Kyrgyzstan, 2002-2011



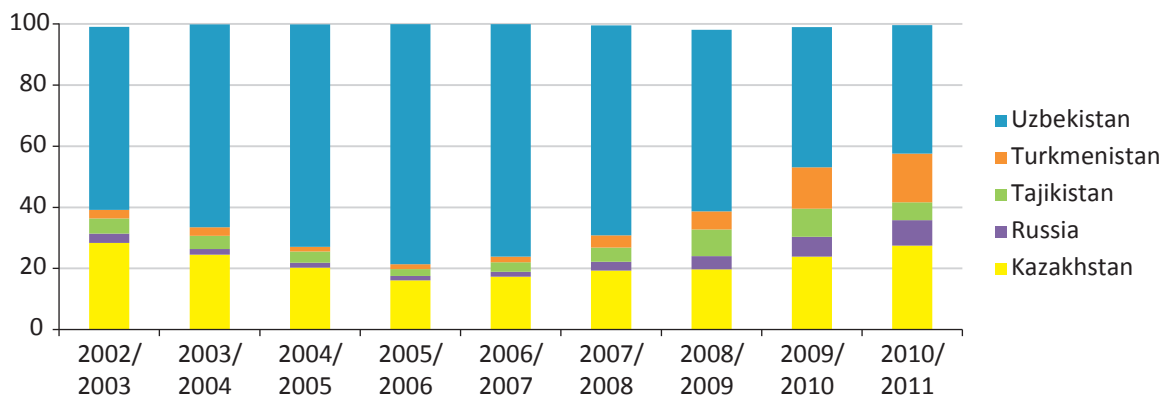
Source: National Statistics Committee of the Kyrgyz Republic

The geography of international students has been quite wide, representing both the Commonwealth of Independent States (CIS) and other foreign countries (hereinafter referred to as non-CIS). The number of foreign students peaked in 2005 at 27,325 or almost 12% of total tertiary enrolment. Of 27,325 students, 19,862 were from Uzbekistan. The increasing number of Uzbek students was mainly due to the opening up of two HPEIs with Uzbek as the language of instruction in Osh and Jalalabat cities in the south of the country (see Table A3).²⁶

²⁶ Again, data on the proportion of full- and part-time students was unavailable.

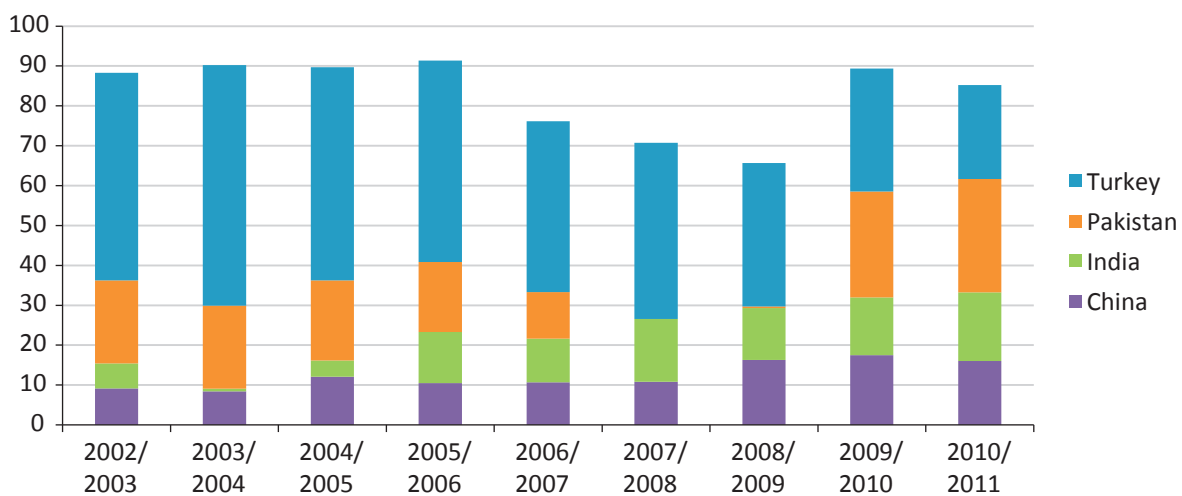
However, since 2005, the number of students declined continuously, returning to its 2002 level of 13,180 people in 2010. The decline was driven primarily by the almost fourfold decrease in the number of Uzbek students.²⁷ During the same period, the share of students from other CIS countries, including Kazakhstan and Turkmenistan, increased (Figure 7).

Figure 7. Students from CIS countries, 2002-2011 (%)



Source: National Statistics Committee of the Kyrgyz Republic

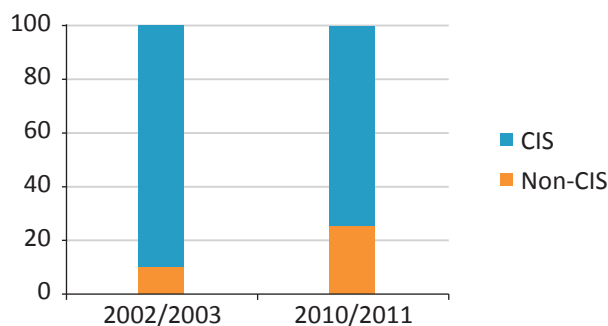
Figure 8. Students from non-CIS countries. 2—2-2-11 (%)



Source: National Statistics Committee of the Kyrgyz Republic

Although CIS students constitute the majority of foreign students, the proportion of non-CIS students has grown (Figure 9) due to both an increase in the number of non-CIS students and decreased numbers of CIS students, especially from Uzbekistan.

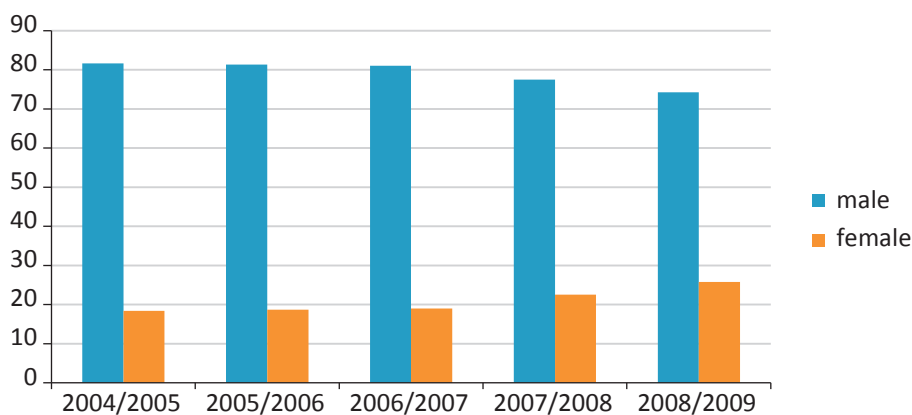
²⁷ Following 2010 events, the number of students from Uzbekistan is expected to decline further. At time of publication, one of the two HPEIs with Uzbek language of instruction was shut down and the other restructured.

Figure 9. Proportion of students from CIS and non-CIS countries 2002-3 and 2010-11 (%)

Source: National Statistics Committee of the Kyrgyz Republic

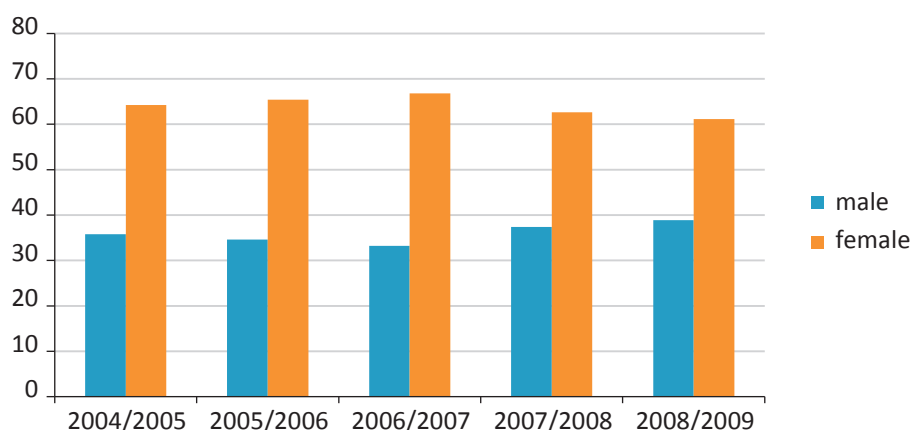
The increase in non-CIS enrolment has been mainly driven by increasing number of students from Pakistan, India, China and Turkey (Figure 8). The establishment of two Kyrgyz-Turkish universities in Bishkek in the early 2000s led to an inflow of Turkish students. These students were attracted by low tuition and a relatively low cost of living, Turkish and English language instruction, recognition of diplomas granted by these institutions in Turkey and a relatively large Turkish diaspora in the country. The establishment of the Asian Medical Institute in Kant (a small town just outside Bishkek in Chui oblast) and the launch of a medical school within the International University of Kyrgyzstan led to the recruitment of an increasing number of students from Pakistan and India. In addition to low tuition and English language instruction, soft medical school entry requirements and the Soviet legacy of good quality medical education are the main motives for these students choosing to study in Kyrgyzstan.

Interestingly, the number of females among non-CIS students has consistently been substantially larger than that of males. Possible explanations for this phenomenon are: (i) it is more difficult for male students from these countries (especially Pakistan and Afghanistan) to obtain visa clearance from the Kyrgyz national security service, and (ii) in the case of Afghan students, there are more scholarships available for Afghan females than for Afghan males. Moreover, Kyrgyz universities do not practice gender discrimination.

Figure 10. CIS students by gender (%)

Source: National Statistics Committee of the Kyrgyz Republic

Figure 11. Non-CIS students by gender (%)



Source: National Statistics Committee of the Kyrgyz Republic

During the last decade Kyrgyzstan has emerged as Central Asia's leader in attracting foreign students. The main determinants behind these developments include: an increased number of both private and public institutions in the country, an increasing number of programmes with English, Uzbek and Turkish language instruction, relatively low tuition and cost of living, and soft university entry requirements. However, recent instability in the country has resulted in a considerable reduction in the number of international students.

5. Survey of international students

5.1 Methodology

To get a more complete picture behind the recent developments in the international higher education sector in the country, the research team conducted surveys, focus group discussions and in-depth interviews with 100 international students, ten students from ten different countries.²⁸ The countries covered include Pakistan, India, Turkey, the Russian Federation, Tajikistan, Kazakhstan, Turkmenistan, Afghanistan, China and Uzbekistan, which have been sending the highest number of students to Kyrgyzstan.²⁹ Eight students from each of the ten countries took part in focus group discussions, followed by individual questionnaires that all respondents completed.³⁰ The questionnaire consisted of 51, mostly closed-ended, questions grouped into five categories: general

²⁸ We used a snowball random selection. We failed to construct a representative sample since we could not obtain information on the population of foreign students in Kyrgyzstan. The National Statistics Committee of the Kyrgyz Republic refused to provide disaggregated information on foreign students on the grounds that such data are classified. At the same time, we covered as many different universities and specialisations as possible.

²⁹ The exception was Afghanistan. This country was included into the list in order to learn about Afghan students' perceptions about Kyrgyz education, to help assess whether there is scope for further cooperation with Afghanistan in the field of higher education.

³⁰ A focus group is a qualitative research method, in which a group of people are asked their perceptions, opinions, beliefs and attitudes towards a product, service, concept or situation. During the process, the facilitator engages all participants equally. The methodology enables researchers obtain information which is not possible to obtain in questionnaires.

information about the respondent; information about their university and specialisation; education-related expenditures; reflection on their education process; and living arrangements, security, social life and plans for the future.³¹ The research tools were all structured to answer the main questions of interest: what were the students' reasons for coming to Kyrgyzstan to study, how foreign students perceive the quality of their education in Kyrgyzstan, what their aspirations are for the future, and what economic impact of international students is.

To select our sample of respondents for the focus group discussions, we selected eight students for each country, and out of those, we selected two to three students at the beginning of their studies, two to three in the middle, and two to three at the end of their studies.³² Half of all respondents from each country were female. Twenty different students (one male and one female from each of the ten countries) were selected for the in-depth interviews.³³ The sample consisted of international students from the following 12 higher education institutions: Kyrgyz-Russian Slavonic University (KRSU), American University of Central Asia (AUCA), International University of Kyrgyzstan (IUK), Bishkek Humanities University, Kyrgyz State Technical University, Kyrgyz-Turkish Manas University (KTMU), International Ataturk-Alatoo University, Aviation College, Kyrgyz State National University, Osh State Social University, Kyrgyz-Uzbek University, and the Osh Humanities and Pedagogical University. All of the institutions except for the last three, which are located in Osh city, are located in Bishkek. Nine focus groups and 18 in-depth interviews were conducted in Bishkek, and one focus group and two in-depth interviews were conducted in Osh city.

5.2 Findings

5.2.1 General information about respondents

The age of surveyed respondents varied between 18 and 30 years, with average age being 22. The majority of surveyed students are enrolled in undergraduate programmes (see Figures 12 and 13). The respondents are enrolled in various years of study, and are pursuing different specializations.³⁴ However, most students from Pakistan and India are enrolled in medical programmes and concentrated at the IUK.³⁵

³¹ The questionnaire can be obtained from the author upon request.

³² Only full-time international students enrolled in bachelor, specialist (5th year of undergraduate studies) and masters programmes were considered. We did not consider international students enrolled in candidate of science programs in Kyrgyzstan. Recently, there has been an increase in candidate of science degree seekers from Kazakhstan and other CIS countries. These developments have somewhat different underlying rationale and are outside the scope of this study.

³³ The in-depth interview, a qualitative research method, is a confidential conversation between an interviewer and a respondent. The methodology was used to complement the focus group discussions by giving respondents an opportunity to express information they may not have been comfortable discussing in a group forum.

³⁴ Including economics, anthropology, information technology, international comparative politics, biology, medicine, geology, aviation, foreign languages, business administration, international relations, customs, physics, mathematics, and air traffic dispatching.

³⁵ Medical students from Pakistan and India also attend Asian Medical School (AMS) located in Kant. However, we did not interview them because of difficulties establishing contact with them. Discussions with their counterparts at IUK led us to conclude that AMS students share the same underlying rationale for choosing Kyrgyzstan as their education destination.

Figure 12. Enrollment of international students in undergraduate and graduate programmes

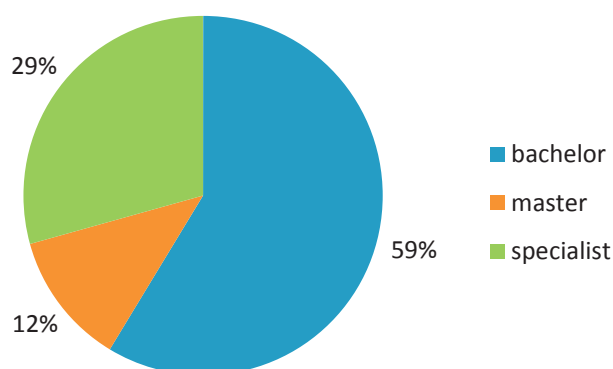
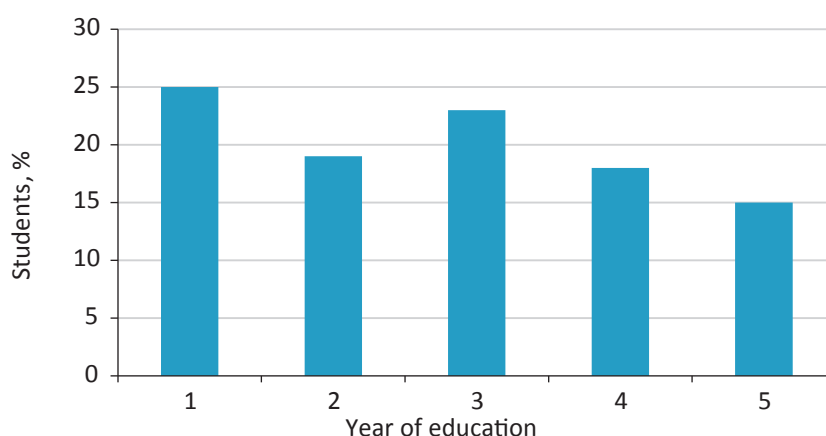


Figure 13. Year of study of international students



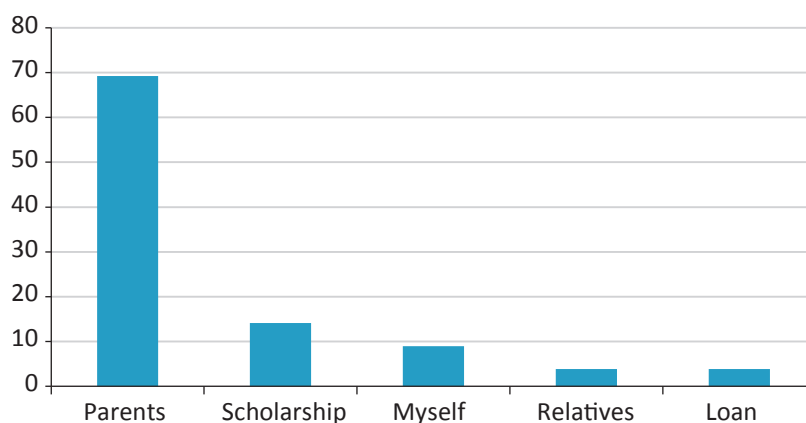
Students from neighbouring countries came mostly from border regions: Jambyl province of Kazakhstan, Fergana of Uzbekistan and Xinjiang of China. Russian students come from the Asian part of the Russian Federation. The geography of students from the remaining countries is diverse. Of Russian and Uzbek students surveyed, only very few turned out to be ethnic Kyrgyz. The majority of surveyed students reported that they had not been to Kyrgyzstan prior to commencing their studies. 13% of surveyed students brought their families with them to the country.

5.2.2 Reasons for choosing Kyrgyzstan as a place of study

Relative low cost of education and living: Respondents in the focus group discussions, the follow-up questionnaire and the in-depth interviews were all asked the main reasons why they chose to study in Kyrgyzstan. The majority of respondents indicated that the tuition in Kyrgyzstan is considerably lower than in their home and neighbouring countries. A number of respondents also stressed that the relatively low cost of living in the country played an important role in selecting Kyrgyzstan. The majority indicated that their families covered tuition and living expenses, so the relatively low cost was an important factor in selecting Kyrgyzstan as an education destination (see Figure 14). The tuition varies greatly across universities and specialisation. The minimum, median and maximum annual tuition indicated were 6,000 Kyrgyz som (USD128), 36,000 som (USD766) and 235,000 som (USD5,000), re-

spectively.³⁶ Lowest tuition was recorded in universities in the south, and the highest tuition is charged at AUCA.³⁷ With regard to specialisations, apart from those offered at AUCA, the most expensive is medicine offered at IUK, at 103,400 som (USD2,200) per year. Although the majority of respondents pay for tuition themselves, some surveyed students received full scholarships covering tuition and living expenses.³⁸ Many Turkish students at KTMU, where tuition is 141,000 som (USD3,000) for some specializations, receive tuition waivers, as do a considerable number of foreign students at AUCA.

Figure 14. Sources of tuition (%)



Survey responses provided more evidence of the relative affordability of Kyrgyz higher education for foreign students. Over 76 % of all respondents (except those from Afghanistan, who overwhelmingly receive scholarships) reported that it is either *not difficult at all* (31.3 %) or *slightly difficult* (44.9 %) to pay for their education in Kyrgyzstan; 62.5 % of Russian students, 37.5 % of Uzbek students and 16.7 % of Pakistani students answered *not difficult at all*. Half of the Indians studying medicine answered *not difficult at all*, and the other half found financing *slightly difficult*.

When choosing an education destination, some respondents considered different countries. Table A4 provides information on tuition, universities and specializations in different countries considered by respondents. Tuition in Kyrgyzstan is considerably smaller than in other countries considered. Some respondents, including students from China, noted that there are some institutions in their home countries that charge comparable tuition. However, they stressed that though the tuition is similar, the cost of living is lower in Kyrgyzstan.

Other factors: Non-financial reasons to select Kyrgyzstan as a place of study vary between CIS and non-CIS students and were expressed by respondents in focus group discussions and interviews (see Table 5). Notably, 18.2% of all respondents consider the environment in Kyrgyzstan safe and favourable despite recent internal turmoil.

³⁶ The exchange rate used in this paper is 1USD = 47 Kyrgyz som.

³⁷ The majority of international students at AUCA receive different types of scholarships.

³⁸ Although they do not pay tuition, these respondents still indicated tuition costs for different specializations at their universities.

Students from CIS countries identified the following reasons to study in Kyrgyzstan: the opportunity to study in Russian; familiar mentality and culture; proximity to home country; presence of relatives; and visa-free regime between Kyrgyzstan and their home countries.

Students from Turkmenistan, Tajikistan, Kazakhstan and Uzbekistan said that similar mentality, language and culture enabled them to quickly adapt to the new environment. They also listed the warm climate and proximity to their home countries as persuasive factors. Relatives, friends, acquaintances who either reside, study or used to study in Kyrgyzstan also influenced decisions to study in Kyrgyzstan.

“I study in Kyrgyzstan because I have relatives here. If I were to study in a third country I would have had to share an apartment with friends. It is not acceptable in my country to live without being watched by relatives. Here, I am staying with my relatives, they take care of me. My parents entrusted me to them.”

Female focus group participant from Uzbekistan

Following the events of June 2010, students from Uzbekistan stopped enrolling in Kyrgyz institutions, resulting in a drastic drop in the number of Uzbek students. Currently, the bulk of students from Uzbekistan are in their mid to final years of education.

Students from Turkmenistan and Russia mainly considered countries with Russian language of instruction. Focus group participants from Turkmenistan noted that study in Kyrgyzstan would improve their Russian language proficiency.

“If you go to Uzbekistan then you will completely forget Russian as the Uzbek language is mostly used for communication. There you need to know Uzbek”

Focus group participant from Turkmenistan

Non-CIS students identified the following reasons to study in Kyrgyzstan: the opportunity to learn Russian; the opportunity to study in English and Turkish; and soft university entry requirements. Chinese students, in particular, aim to learn Russian in Kyrgyzstan, and then go on to choose their specialization, whether in Kyrgyzstan or in another country. Students from Turkey stress the opportunity to learn foreign languages (English, Russian and Kyrgyz) as a key reason for selecting Kyrgyzstan.³⁹

Non-CIS students from Pakistan and India indicated the opportunity to study in English as a key factor. Additionally, students pursuing medical degrees noted that the length of medical education in Kyrgyzstan is five years; in other countries it is seven years.

“I also considered Kazakhstan to study medicine. But there it is a seven year programme, whereas here it is 5 years. This is an advantage for me. Moreover, I heard that the language of instruction there is Russian. At that time I did not know Russian.”

Interview participant from Pakistan

³⁹ Turkish students are mostly concentrated in Kyrgyz Turkish universities, where the languages of instruction are both Turkish and Kyrgyz, and second and third years students can take courses delivered in English.

Students from India, Pakistan and (to a lesser extent) Turkey noted that due to tough admission requirements and competition, they cannot enter universities in their home countries. This is especially true for medical studies which are considered prestigious and are in high demand in these countries. Medical students from India and Pakistan admitted that medical school entry requirements are soft, and studies are much easier in Kyrgyzstan.⁴⁰

“In my country a lot of people want to study medicine. However, it is very difficult to enter a medical school, especially a public one. And those who cannot enroll in medical school in India can come to Kyrgyzstan”

Survey respondent from India

“While in Pakistan, I was not a good student, and had a low GPA. Pakistan needs students with good grades. In any case, we would not be able to enter any university in Pakistan with such grades. To become a doctor in Pakistan is much more difficult. The education system there is one of the toughest, as far as medicine is concerned. Moreover, here it is less costly to study. And I like that in this university one has to study only 5 years. So we save time”

Interview respondent from Pakistan

Instability in Afghanistan was often given as the main factor for young people from this country to seek education abroad. This, together with the availability of scholarships for female students from Afghanistan to study in Kyrgyzstan at the American University, are the main reasons behind Afghan students choosing to study in Kyrgyzstan.⁴¹ Focus group participants from Afghanistan agreed that standards of education in Afghanistan are much lower than in Kyrgyzstan.

“All girls from Afghanistan receive scholarships, which covers costs of education. We sat entry exams in Afghanistan. And we can study here, at AUCA, free of charge”

Female focus group participant from Afghanistan

“AUCA, jointly with Afghanistan, established scholarships for women in 2003...for Afghani girls, it is a great opportunity to receive a higher education”

Female focus group participant from Afghanistan

Table 5 below presents a summary of reasons provided by survey respondents to the question why they decided to come to Kyrgyzstan. Students could choose from several predefined answers.

⁴⁰ It would be inaccurate to generalise that all universities in the country lack rigorous entry requirements. However, the number of institutions that turn away minimally qualified applicants who can pay tuition seems to be small.

⁴¹ The majority of male students from Afghanistan pay for their education themselves.

Table 5. Reasons for choosing Kyrgyzstan as a place to study

Reasons	%
Low cost education	74.0
High quality education	24.7
Proximity to home country	24.7
Soft university entry requirements	23.4
Language of instruction is Russian	20.8
Have relatives here	19.5
Safe and good environment	18.2
Language of instruction is English	16.9
Language of instruction is Turkish	10.4
Don't have to attend classes to get diploma	6.5
Language of instruction is Uzbek	2.6
Scholarship	2.6
I do business/work in Kyrgyzstan	2.6
It is my homeland	1.3
Would like to start family here	1.3
Other	2.6

More generally, how respondents learned about Kyrgyz higher education institutions also influenced their decision. The majority of students were advised by relatives, friends and acquaintances. Some, mostly students from Pakistan and India, indicated that agents' recommendations were important.⁴² The majority of respondents had not received any useful information about higher education opportunities in Kyrgyzstan from Kyrgyz embassies or consulates in their countries. Some participants commended student recruitment campaigns of some Kyrgyz institutions.

"...Every year, AUCA comes to Khorog and conducts entry examinations. It has been like this for ten years or more. So, by now we know a lot about this institution."

Survey respondent from Tajikistan

Another significant factor for selecting Kyrgyzstan for some students was the recognition of Kyrgyz diplomas in their home countries. A number of institutions grant dual diplomas, for example, AUCA (American and Kyrgyz), KTMU (Turkish and Kyrgyz) and KRSU (Russian and Kyrgyz). However, the majority of students from both CIS and non-CIS countries said that upon returning home they would have to go through a one or two year process of additional training and examinations to have their diplomas accepted in their home countries.⁴³

⁴² An agent is a person who is paid to provide services to perspective students, including such as finding places to study or live.

⁴³ To mitigate this problem some students from Kazakhstan complete one to three years in Kyrgyzstan and then transfer to universities in Kazakhstan.

“There is a National University. Students who received higher education abroad have to go through exams in the official language at this institution. If you pass them, then your diploma is acknowledged. This is what I have heard...”

Respondent from Turkmenistan

Medical students from Pakistan said that upon their return home they have to go through an attestation process that involves study for at least one year, examinations and an internship. Students from Russia said that their diplomas will be acknowledged in Russia since potential employers check their skills and knowledge first, and then check their diploma. The same view was shared by respondents from Turkey, Afghanistan and Tajikistan.

5.2.3 Reflections on education process and quality

A substantial number of respondents indicated the quality education as a reason to come to Kyrgyzstan. Focus group and in-depth interview participants provided their perceptions of the quality of education at their current institutions. Among focus group participants, 61.3 % rated the quality of education as good and 18.7 % rated it as excellent (Figure 15). A majority of survey respondents rated their professors’ qualifications as good (54.7 %) and excellent (30.7 %) (see Figure 16). The majority of in-depth interview participants also found the quality of education above average.

Figure 15. Student perceptions of quality of education at their institutions (%)

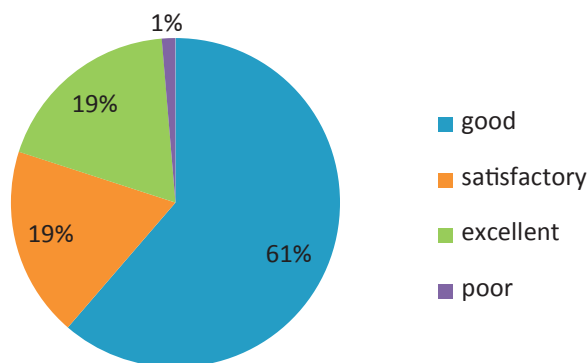
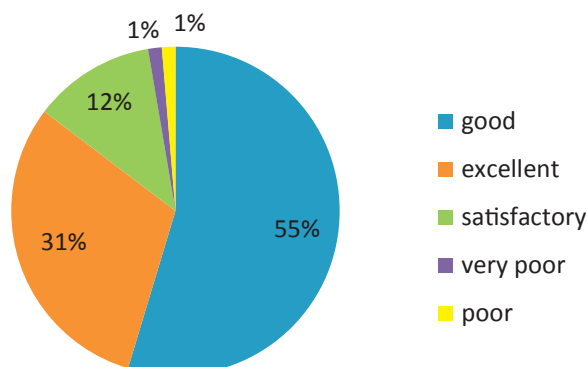


Figure 16. Student perceptions of professor qualifications (%)



There were some students who were not satisfied with either the overall quality of education or with some aspects of it, and some problems were identified. These included poor techni-

cal equipment in classes (except at AUCA and KTMU); dispersion of academic buildings that made attendance of different classes difficult; issues with the language proficiency of professors; shortages of textbooks and other teaching materials; and lack of practical classes, which was mostly noted by medicine students.

“In the first year of our studies we are not allowed to treat patients, there are almost no practical classes. Here, we study mostly from books, but in India there are more practical classes”

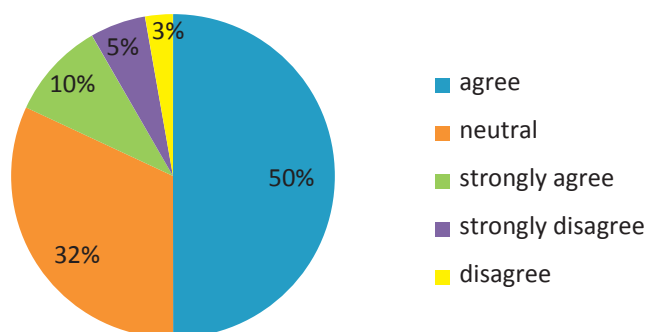
Medical student from India

“There are some professors who do not know Russian language well. Even if they know it, they have trouble explaining some terminology”

Respondent from Kazakhstan

Overall, the majority of respondents stated that they are happy with the quality of education provided in their institutions and that their expectations have been met. More than 50% of respondents would recommend studying in Kyrgyzstan to their friends and relatives.

Figure 17. Student responses to the statement: “I would recommend studying in Kyrgyzstan to my friends and relatives” (%)



Despite positive perceptions of foreign students about the quality of Kyrgyz education, their other responses also revealed that a significant reason for choosing Kyrgyz institutions was soft university entry requirements. This may mean that the country is not recruiting the best students and their perceptions on education quality should be interpreted with caution.

Survey respondents were also asked what, in their view, could improve the quality of higher education in Kyrgyzstan and help attract more international students. Their recommendations include: increase the number of international faculty, including English native speakers, in international universities; introduce new technologies and interactive teaching methods (this was especially noted by students from universities located in the south of Kyrgyzstan); introduce orientation programmes when absent; offer additional language training; and offer more practical classes, seminars and internships. Students further noted that there are a lot of general education courses in existing curricula that could be replaced by core subjects. Respondents also mentioned the lack or ineffectiveness of teaching monitoring and evaluation units within universities. Finally, some students identified corruption at some universities as an impediment to the development of the international higher education sector in the country.

5.2.4 Difficulties facing foreign students

Corruption in institutions⁴⁴

Survey, focus group and in-depth interview participants were asked whether or not they had to present gifts or money to teachers in order to pass examinations at their institutions. The majority of participants (80.8 %) answered that they had passed all their exams without giving bribes (Figure 18). Respondents from KTMU and AUCA stated that they had not heard of cases of corruption at their universities.

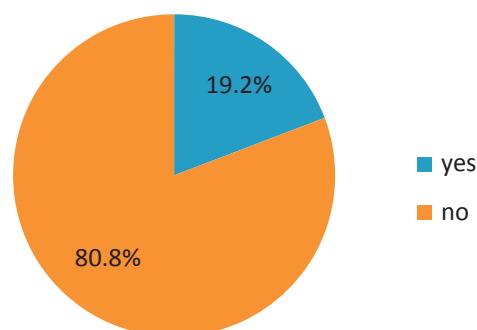
“I can provide an example. My friend from Tajikistan was already admitted to the university with a scholarship. As a sign of appreciation, but not with a purpose to bribe, she just wanted to present a gift/souvenir. However, they refused to accept it. They said that this may be considered corruption and they may lose their job. Then they asked us to leave”
Respondent from Tajikistan

However, 19.2 % of respondents said they had given bribes.⁴⁵ Of those, some had given bribes voluntarily (84.6 %) and some were forced to do so (15.4 %). Focus group discussions and in-depth interviews revealed that in most cases, the initiative to bribe comes from students themselves for different reasons. Some said they are not interested in attending certain classes, and others stated that it is easier to pass some exams by bribing.⁴⁶

“Those who study do not give bribes. Only a few give bribes. Professors observe who attends classes and puts effort into their studying. And those people pass exams. However, those who miss classes and do not study, they give bribes”
Respondent from Uzbekistan

“If I do not like a class and am not interested in the subject, I bribe”
Respondent from Turkmenistan

Figure 18. Student responses to being asked whether they have given bribes to pass exams in their institutions (%)

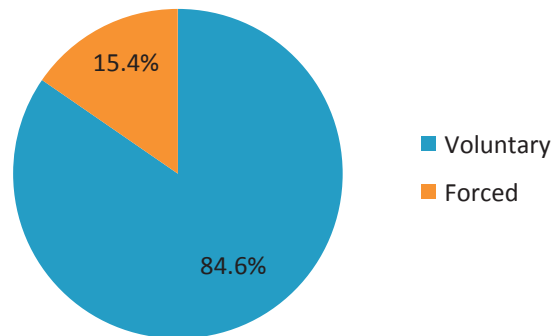


⁴⁴ When referring to corruption in this paper, we limit ourselves to student-teacher bribes.

⁴⁵ The majority of people who reported giving bribes are from CIS countries.

⁴⁶ It would be interesting to see how this situation compares with their home countries. However, since the major bulk of the respondents came to Kyrgyzstan right after high school, they could not provide a reasonable comparison.

Figure 19. Student responses to being asked whether they were forced to give bribes or did it voluntarily (%)



Discrimination and security

Participants were asked whether or not they had experienced discrimination (unfair treatment). About 19 % of all focus group participants either *mildly agreed* or *strongly agreed* with the statement that international students often experience discrimination in Kyrgyzstan; and 27 % either *strongly disagreed* or *mildly disagreed* with the statement that Kyrgyzstanis generally have a positive attitude towards international students.⁴⁷ Survey respondents were also asked whether they feel safe in the country. Responses were split between those who feel quite comfortable and safe, and those who feel unsafe. Recent events in the country, combined with continuing protests have raised security concerns among international students. However, some respondents noted that security threats come from the police. The majority of respondents stated that they try to stay at home at night.

Students from CIS countries, who look like the local population, indicated that there had experienced rare instances of discrimination against them, primarily due to language barriers.

“There are some professors who discriminate against foreigners. I experienced this myself. In the first year of my studies, I had to take a Kyrgyz language class. Since we did not know the Kyrgyz language, we were adding Kazakh words. And they said if you keep using Kazakh words, you will fail and get dismissed. They did not care that I am a citizen of Kazakhstan”
Respondent from Kazakhstan

Examples of unfair treatment by professors were raised by Turkish students.

“In our programme, even if we do well in exams, we do not get more than 80%, whereas Kyrgyz students get 90-95%, even if they do not attend classes”
Respondent from Turkey

Other respondents reported that they had not experienced discrimination by professors. However, some reported discrimination by other students and people outside the university. Some respondents from Pakistan said that they do not feel comfortable in the country.

⁴⁷ This may be due to improper treatment of international students by the Kyrgyz police

“We always feel an unfriendly attitude towards us from the local people... everywhere and all the time... whether it is in a hospital, university or on the street. I do not know why they behave like this. I am already fed up with this”

Respondent from Pakistan

Some students noted that the transition to life as a student in Kyrgyzstan was quite difficult in the beginning. They were not well received at the university and they had problems establishing contact with fellow students, but over time they found a common language and made local friends.

The majority of non-CIS students (from Pakistan, India, Turkmenistan, Afghanistan, Turkey and China) reported being frequently stopped by police for verification of documents. As many as 65.3% of all focus group participants reported being stopped and harassed by either police or other law enforcement officers. Students from Turkmenistan and Afghanistan said that they are usually stopped when they wear long beards. Most students indicated that after their documents were verified, the police let them go. However, in some cases, money extortion by law enforcement officers occurred.

“Nowadays, I am rarely stopped by the police. But during the first year of my studies I was stopped quite frequently. They were stopping me and friends of mine and having found out that we are AUCA students, they were mostly letting us go. However, even if everything was okay with our documents, they were extorting money from us, but not big amounts”

Respondent from Afghanistan

One student from China reported that police officers stole some money from him while inspecting his documents and the contents of his wallet. Other students said that when they forgot their documents at home, they had to give money to the police. Focus group participants from Pakistan said they consider encounters with the police in Kyrgyzstan more dangerous than encounters with criminals.

“Once I was stopped by police. They took me to their car. When I asked them to explain me the reason, the policeman told me: ‘I am your President and Prime-Minister and I can do whatever I would like to you. You are nothing here.’ Then they took some of my money”

Respondent from Pakistan

Students from Turkey reported inadequate reactions of the police in doing their duty. When they are harassed on the street, policemen, in general, do not take any measures to restore order even if they see witness the situation. On the other hand, Indian students said that they have not been discriminated against, though they heard about discrimination from other foreign students. They also observed that male students are often the target of harassment, not female students.

Female students from Russia assert that they have experienced gender-based discrimination. When they have discussions in school, male students often ignore their arguments just because they are women. They also report being criticized if they wear short dresses. However, the majority of surveyed female students, especially those from Afghanistan, India and Turkmenistan, reported not experiencing gender-based discrimination and being satisfied

with how women are treated in Kyrgyzstan. They find the attitude towards women in Kyrgyzstan more liberal than that of their home countries. Of all female focus group participants, only 17.2% reported being harassed or discriminated against because of their gender.

“For girls, it is even safer than for men. Even when I walk alone on the street after 9pm and pass by a group of males I do not experience any problems”
Female respondent from India

A number of respondents said they were discriminated against because of their nationality and reported unfair treatment when looking for accommodation. According to them, landlords either try to charge higher than market rent or just refuse to rent their apartments to them.

“I wanted to rent a flat near my university. When I found one, the landlady refused to rent her apartment, stating that Chinese students usually do not keep flats clean”
Respondent from China

Reflections on other aspects of life in Kyrgyzstan

Respondents were asked to assess the quality of different services in Kyrgyzstan, including transportation, medical services, accommodation, banking services, shopping facilities, sports and recreational facilities and the international students office at their institution. Most survey participants noted the poor condition of public transportation, especially that of minibuses or *marshrutka*, except Pakistani students who found *marshrutka* to be an excellent means of transportation.

Respondents' perceptions about the quality of medical services were mixed. Complaints included the poor equipment at most medical institutions and the refusal of some doctors to treat international students or attempt to charge a lot for their treatment. On the positive side, some noted the good qualifications of Kyrgyz doctors and the accessible, well-functioning medical centres at their institutions.

Most respondents provided positive feedback on banking services, shops and shopping facilities, and sports and recreational facilities. With regard to accommodation, students who stay in dormitories reported not being satisfied, while those who had off-campus accommodation rate its quality as good.

Although many respondents find the support they receive from the international student office at their institution appropriate, some respondents find it inadequate. Some stressed the poor assistance they receive during registration and renewing student visas; this is especially true for students from Uzbekistan studying in Osh.

“When our students arrive in September, the student affairs office does not help them with registration. For example, in Manas, Slavonic and National universities in the beginning of September, when international students arrive, they collect their passports and arrange registration stamps. Later, when they cross the border, they will not have a problem”
Respondent from Uzbekistan

6. Assessing the economic impact of international students

In this section, estimates of the economic impact of international students in 2011 are provided. For the calculation of economic benefit, data supplied by the focus group participants (80 students) who also filled out the questionnaire was used. One section (out of four) of the questionnaire contained questions about education-related expenditures of foreign students. The students were asked to supply information about their expenditures related to tuition, accommodation, utilities, food, transportation, communication services, books and other study materials, visa and registration, sightseeing, in-country travel and other activities (see Table A5 and Figures A2-7).⁴⁸

When calculating aggregate expenditures a conservative approach was used. For most expenditure lines, the numbers on the lower boundaries of the reported interval were used.⁴⁹ Information on the total number of international students and their breakdown by countries in 2011 was provided by the National Statistical Committee of the Kyrgyz Republic. Families accompanying international students were also accounted for. Finally, the country's 2009 inter-industry balance and input-output tables were used to calculate the value-added of different sectors of the Kyrgyz economy.⁵⁰ The calculated value-added coefficients were then used to estimate the contribution of international students to GDP of the country.

Table 6. International students' expenditures and contribution to Kyrgyz GDP

Expenses	USD	Value-added coefficient	Contribution to GDP, (USD)
Tuition	8,141,300	0.7	5,698,910
Accommodation	7,086,022	0.56	3,968,172
Utilities	2,267,527	0.45	1,020,387
Food	7,086,022	0.24	1,700,645
Communication	1,417,204	0.5	708,602
Books and other educational materials	283,441	0.2	56,688
Visa and registration	144,774	0.6	86,865
Other	3,401,290	0.55	1,870,710
Total	29,827,580		15,110,979

Source: Author's calculations based on survey information

Table 6 provides estimated expenditures by foreign students. In 2011, aggregate expenditures by foreign students amounted to around USD30 million. The contribution of international higher education institutions to GDP was approximately USD15 million or 0.25% of GDP in 2011.⁵¹ Thus, the economic benefit of foreign students was moderate in absolute numbers. However, this number, US\$15 million, exceeds the 2010 Kyrgyz Republic budget

⁴⁸ For the conversion into US dollar equivalent USD1=47som exchange rate was used.

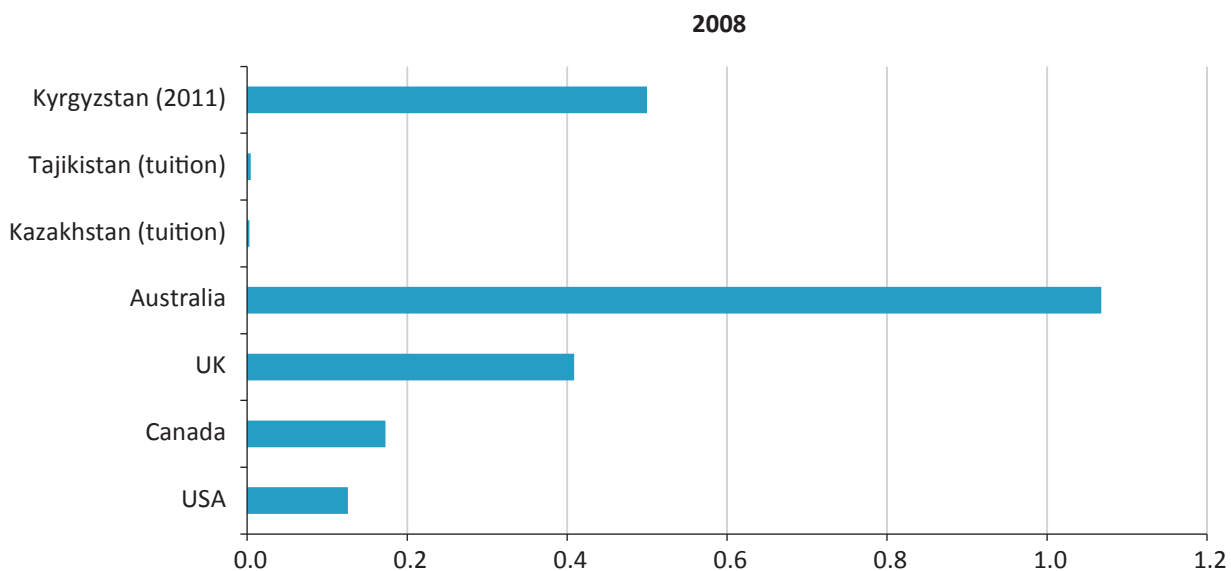
⁴⁹ For instance, the 2011 tuition revenue estimate of the National Bank of the Kyrgyz Republic is USD8.4 million, whereas we estimate this number to be USD8.141 million.

⁵⁰ Available online at <http://stat.kg/images/stories/docs/tematika/sns/Publ.%20app.2009.xls>

⁵¹ If the multiplier effect of education-related expenditures of foreign students is taken into account, the contribution to GDP would be higher. However, the increase could not be substantial, so this calculation is based on the examination of immediate effects.

allocation of USD12 million for the higher education sector of the country. Additionally, in relative terms, expenditures by foreign students in Kyrgyzstan can be compared to those of leading exporters of higher education (Figure 20).⁵²

Figure 20. Export of education services (% of GDP)



Source: Author's calculations based on UN Service Trade database for all countries except Kyrgyzstan

7. Conclusions and policy implications

This paper examined recent developments in the international higher education sector in Kyrgyzstan. It attempted to (i) provide an explanation for why the country has outperformed its Central Asian neighbours, becoming the regional leader in recruiting international students, and (ii) assess the impact of international students on the Kyrgyz economy. Surveys, focus group discussions and in-depth interviews involving 100 international students from ten different countries, including Afghanistan, were conducted.

The findings suggest that the main factors behind the increasing number of foreign students in Kyrgyzstan are the relatively low cost of education and living; the relatively good quality of education (as perceived by foreign students); soft university entry requirements; proximity to home countries; the possibility to study in different languages; and the availability of donor-funded scholarships.

Using survey data on foreign students' expenditures and the Kyrgyz 2009 Input-Output tables, the economic contribution of international students, disregarding the multiplier effect, was estimated at 0.25% of the GDP in 2011. To further strengthen and develop the international higher education sector and increase this contribution, the government and HPEIs should address a range of issues that emerged from the study.

⁵² The economies of these industrialized countries are much more advanced and therefore the export of education services constitutes only a small portion of their GDP.

Focus group discussions revealed that the country is not attracting the best students. This has two implications. First, student satisfaction with the quality of Kyrgyz education should be interpreted with caution. Second, though the strategy of soft university entry requirements may prove useful at this stage, it may not be sustainable in the long term. The government and HPEIs should continue their efforts to improve the quality of higher education and gradually tighten entry requirements.

Another impediment to the development of the international education sector is the harassment of international students by the law enforcement agencies. The government should take appropriate measures to mitigate such cases.

Student responses indicate that when they return home, they have to go through an attestation process involving additional study and exams if they want their Kyrgyz diplomas to be recognised. The government should continue their dialogue with its CIS counterparts aimed at mutual recognition of diplomas.⁵³

Survey findings revealed that potential international students get information about studying in Kyrgyzstan from friends, relatives or agents, not embassies or consulates of the Kyrgyz Republic. The HPEI should work with the government (Kyrgyz embassies and consulates) to develop and implement active information campaigns about higher education opportunities in the country.

Almost all Afghani respondents provided positive feedback on higher education in Kyrgyzstan. There is a room to further expand cooperation between Kyrgyzstan and Afghanistan in the area of higher education, by attracting more Afghan students to the country. Finally, it would be desirable if the government encouraged the establishment of more higher education institutions with English language instruction. This strategy has proved useful in many developing countries, such as Malaysia and China.

⁵³ This might require establishing an independent university accreditation agency in the country.

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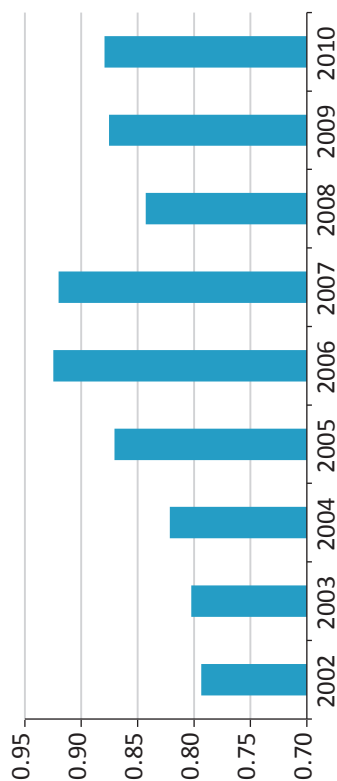
Appendices

Table A1. Number of HPEIs by regions in Kyrgyzstan

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Batken										2	2	3	1	1	2	2	1	1	1	1	1
Jalalabad				5	3	3	4	8	3	3	5	5	5	5	5	5	3	4	5	5	4
Issyk-Kul	1	1	1	1	1	3	4	5	2	2	2	2	2	3	3	3	2	2	2	2	2
Naryn							1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Osh region	1	2	2	2	3	3	5	8	4	4	4	5	6	1							
Talas								2			1	1	1	1	1	1	1	1	1	1	1
Chui				1	1	1		1									1	1	1	1	3
Bishkek	8	9	10	12	15	21	25	29	30	28	30	31	30	30	31	33	33	33	33	34	35
Osh														6	6	6	5	6	6	9	9

Source: National Statistics Committee of the Kyrgyz Republic

Figure A1. State budget expenditures on higher professional education (current expenditures excluding capital assets and repair works) (% of GDP)



Source: National Statistics Committee of the Kyrgyz Republic, 2011

Table A2. International students from non-CIS countries

	2002/2003	2003/2004	2004/2005	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010	2010/2011
Total	1,340	1,402	1,647	2,045	2,342	2,713	3,113	3,431	3,366
Afghanistan	9	20	25	34	128	75	62	87	73
China	123	118	199	214	250	294	507	601	539
India	84	9	67	262	256	426	406	497	581
Iran	6	10	10	12	11	18	24	18	17
Mongolia	1	-	-	-	22	27	30	28	13
Nepal	13	15	16	13	13	50	48	52	82
Syria	15	12	12	12	275	624	724	22	27
Pakistan	279	292	331	360	274	-	12	911	955
Turkey	697	846	880	1,033	1,003	1,199	1,119	1,057	793
other	113	80	107	105	110	-	181	147	281

Source: National Statistics Committee of the Kyrgyz Republic

Table A3. International students from CIS countries

	2002/2003	2003/2004	2004/2005	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010	2010/2011
Total	12,093	14,847	21,918	25,280	24,863	22,293	17,123	12,994	9,814
Azerbaijan	14	5	15	-	10	7	13	16	21
Armenia	58	1	1	3	-	1	-	2	3
Belarus	10	5	1	1	2	8	-	41	-
Georgia	-	-	-	-	8	22	289	11	5
Kazakhstan	3,426	3,635	4,436	4,081	4,298	4,314	3,370	3,107	2,700
Moldova	1	1	-	2	-	41	1	1	2
Russia	371	277	362	356	399	635	748	842	818
Tajikistan	606	641	810	558	784	1,040	1,495	1,196	570
Turkmenistan	335	418	327	409	450	880	1,008	1,751	1,567
Ukraine	33	8	11	8	3	16	26	71	11
Uzbekistan	7,239	9,856	15,955	19,862	18,909	15,329	10,173	5,967	4,122

Source: National Statistics Committee of the Kyrgyz Republic

Table A4. Tuition in countries/universities considered by respondents

No	Home Country	Country of Education	Specialization	Tuition (USD)
1	India	India	Medicine	6,000-9,000
2	India	Central America	Medicine	23,000
3	Russia	Russia (Omsk)	Journalism	min 1,300
4	Russia	Kazakhstan	Journalism	5,000
5	Tajikistan	Kazakhstan	International relations	2,500
6	Tajikistan	Tajikistan	International relations	4,500-5,000
7	Turkey	Turkey	-	4,000-5,000
8	Uzbekistan	Uzbekistan	-	1,000-1,200
9	Afghanistan	Afghanistan	American University	5000-7000
10	Kazakhstan	Kazakhstan	-	1,000-25,000

Table A5. Monthly expenditures on accommodation

Amount	% of respondents
none	7.3
1000-2000 som	7.3
2001-3000 som	22
3001-4000 som	14.6
4001-5000 som	9.8
above 5000 som	39

Figure A2. Monthly expenditures on utilities

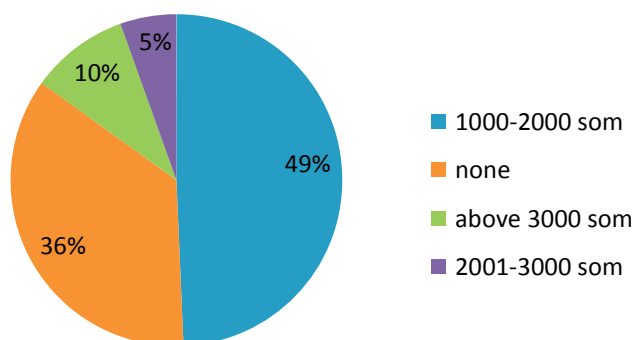


Figure A3. Monthly expenditures on food

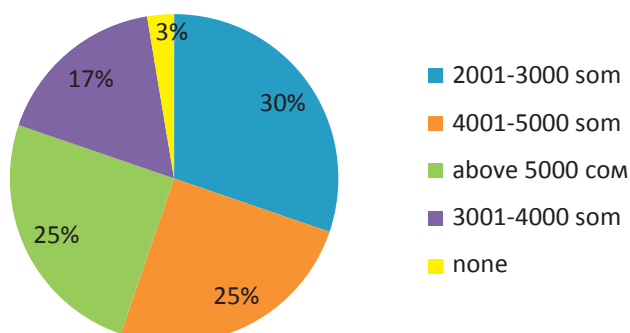


Figure A4. Monthly expenditures on communication

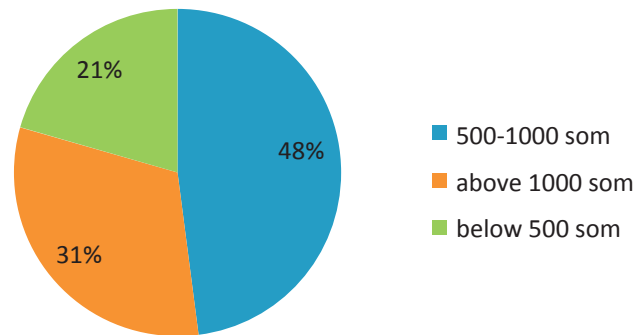


Figure A5. Expenditures on books and other study materials, per semester

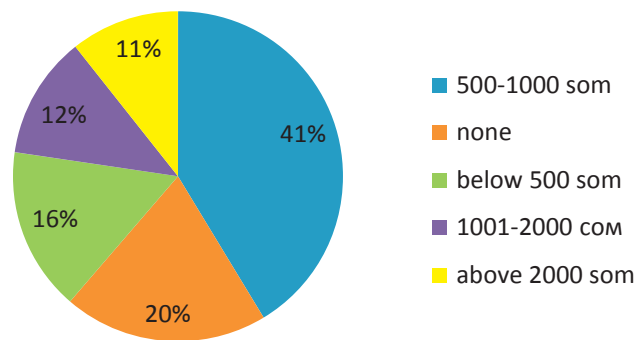


Figure A6. Monthly expenditures on travel, sightseeing, and other activities

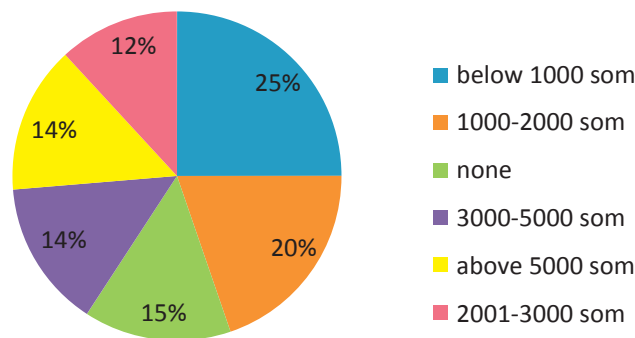
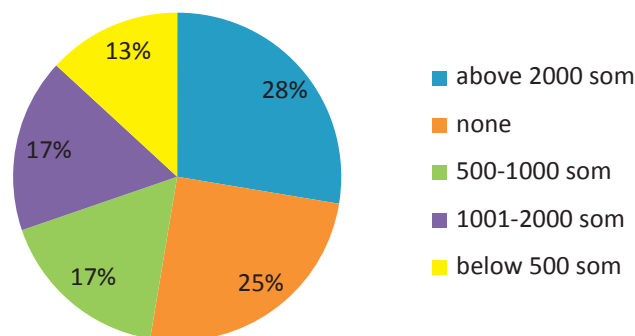


Figure A7. Annual expenditures on visa and registration



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