

Analysis of The Market for Educational Services of Higher Educational Institutions of The Republic of Uzbekistan In Modern Conditions

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Abstract. In this paper author has analyzed the market for educational services of higher educational institutions of the republic of Uzbekistan in modern conditions. The condition is changed a lot from the last decades and there are many factors which are responsible to upgrade and modify the higher educational system in the country.

Keywords: Educational programs, higher education, information technologies, communication, capital, university.

1. INTRODUCTION

The sphere of higher education in the Republic of Uzbekistan today is one of the most dynamically developing levels of the country's educational system. After all, a strong state with an innovative economy, a fair civil society where all human rights and interests are ensured, cannot be built without creating an impressive personnel reserve. Training qualified specialists with critical thinking and modern knowledge in the most in-demand professions is the primary task set by the head of state.

Higher educational institutions of Uzbekistan are developing in different directions, the number and variety of educational programs is growing, new forms of educational services and additional services for students are appearing, more comfortable conditions are being created for the implementation of the learning process, the qualifications of teaching staff are being improved, research activities are developing, Work is underway to attract foreign students. Some leading universities in Uzbekistan have recently achieved significant growth in their performance indicators and taken better positions in international rankings, but this progress is not typical for all Uzbek universities. Despite the achievements of individual educational institutions in various fields, their success against the background of the entire higher education market is not significant. Some universities were only able to maintain their positions, without significant development, which is typical for both large and small universities, both locally and internationally. Ultimately, some educational institutions experienced a deterioration in their performance and were even disbanded.

The competitive position of a university in the higher education market and its attractiveness for applicants is influenced by its position in national and international university rankings, which are calculated using quantitative data on the performance of universities. The description of the evolution of the education system focuses on its potential, which is determined by the availability of educational institutions, teachers, student population and funding. The work presents mainly quantitative data characterizing some qualitative changes.

2. LITERATURE REVIEW

Scientific research in the field of marketing to various forms and types of organizations was carried out by a significant number of domestic and foreign scientists, among whom the works of F. Kotler [1], P. Moody, A. Cottam [2], L. Berry, S. Homburg [3], O. Jensen, J. deserve attention. Workman, E. Olson [4], S. Slater, R. Ahrol [5], J. Licata [6], S. Moorman [7], et al. The works of these scientists are fundamental in nature and they reveal the conceptual apparatus, theoretical and methodological approaches to marketing organizations.

Among the researchers from the CIS countries, the works of such scientists as O.Saginova [9], T. Ozhereleva [10], U. Zinnurov [11], N. Stefanova [12], M. Khayustova, O. Achkasov, D. Shevchenko, S. are devoted to theoretical and methodological issues of marketing educational services in higher education. Nedelko, A. Ostashkov, E. Bikmetov, I. Ruvenny, Kh. Sudarkina, I. Kibanova and others. The works of these scientists propose the use of marketing tools and marketing communications in order to increase the competitiveness of an educational institution.

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R.I. Nurimbetova, Sh. Umarova and others deserve attention.

The studied scientific works of foreign and domestic scientists give an idea of the importance of marketing in creating and maintaining a university's competitive advantage, attracting and retaining students, creating partnerships and maintaining financial sustainability. However, questions remain open about improving the marketing activities of educational services in higher educational institutions in the context of the globalization process, which is due to the strengthening of international relations and cooperation, the development of information technologies and communication means.

3. ANALYSIS AND RESULTS

In recent years, the number of higher education institutions in Uzbekistan has increased significantly. These processes were accompanied by the formation of a new organizational and legal structure of the higher education system: an increase in the number of non-state universities, the spread of the practice of creating branches of foreign universities, as well as the emergence of new forms of education, including joint educational programs, distance education and double degree programs. Intra-university structures have also changed dynamically.

Increased demand for higher education programs has led to an increase in public universities, where the growth rate compared to 2012 was 328.12%. This quantitative growth was carried out through the division of old institutions, the separation of faculties into independent institutions, or through the creation of new universities on the initiative of state authorities. This process was also accompanied by the creation of university branches or the opening of new ones in the regions of the country. The growth trend in the number of higher educational institutions (state and non-state) is shown in Table 1.

Table 1: Dynamics of growth in the number of universities in Uzbekistan

Year	State		Non-state		Branches	
	Qty	Pace growth, %	Qty	Rates of growth, %	Qty	Rates of growth, %
2012 / 2013	64	–	–	–	6	–
2013/2014	66	103.1	–	–	6	100.0
2014/2015	68	103.0	–	–	7	116.7
2015/2016	69	101.5	–	–	7	100.0
2016/2017	70	101.4	–	–	7	100.0
2017/2018	72	102.9	–	–	7	100.0
2018/2019	98	136.1	1	–	10	142.9
2019/2020	119	121.4	4	400.0	16	160.0
2020 / 2021	127	106.7	5	125.0	18	112.5
2021 / 2022	154	121.3	17	340.0	25	138.9
2022 / 2023	210	136.4	65	382.3	thirty	120.0

The results of statistical analysis show that there is a trend in the country to increase the number of universities, which is a positive characteristic of the development of the market for scientific and educational services. The growth rate of non-state (private) universities has increased significantly over the past few years. It is worth noting that a large number of universities are concentrated in the capital, and the number of universities at the regional level is moderately concentrated.

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As of 2022/2023, there are 210 higher educational institutions in the Republic of Uzbekistan, of which 36 are universities, 48 are institutes, 4 are academies, 1 is a conservatory, 65 are non-state (private) higher educational institutions, 26 are branches of state universities and 30 – branches of foreign universities.

The author analyzed data from the Statistics Agency under the President of the Republic of Uzbekistan and classified higher educational institutions by specialization and field of study, the data is presented for 2022/2023

(Table 2.).

Table 2: Specialization of higher educational institutions of Uzbekistan

Specialization	State	Non-state	Branches
Multidisciplinary	12	39	12
Economic	5	10	6
Technical	14	–	6
Transport	1	–	–
Construction	2	–	–
Medical	eleven	5	1
Sports	2	–	–
Legal	2	2	1
Creative	8	–	1
Pedagogical	20	3	1
Technological	10	6	2

Above we can see that the largest part is made up of universities teaching in multidisciplinary areas, 39 of which are non-state, pedagogical universities take second place, but here the situation is different - 20 universities are state-owned. It was also revealed that in the Republic of Uzbekistan there is only one university specializing in transport, two specialized architectural and civil engineering universities, as well as 5 state specialized economic universities.

When it comes to the difference between public and private universities, they differ in several aspects:

1. Funding: public universities are often financed from the state budget, while private universities receive funding from private investors.
2. Tuition fees: At public universities, tuition fees for students are usually lower than at private universities. At private universities, tuition fees can vary significantly depending on the program of study, the university's ranking and other factors.
3. Regulation: public universities are subject to strict government regulation, while private universities have greater freedom in organizing the educational process.
4. Level of qualifications of teachers: in state universities teachers with the highest qualifications and experience in the educational process teach. Private universities can often attract reputable business experts to teach.
5. Interests of students: the program of study in a public university represents a general discipline in accordance with state standards, while the program in a private university can be focused on certain areas in accordance with the needs of the labor market.

The difference between public and private universities depends on the local laws and regulatory framework in each country.

The number of students and the structure of the teaching staff are one of the key factors characterizing the state of the education system. The presence of a significant number of students studying in universities has a significant impact on the economic, scientific and social development of the country. In the economic field, since higher education is considered a key factor in economic development, since the number of students can have a direct impact on the volume of production and the innovative potential of the economy. On the scientific side, the number of students allows us to increase the number of research and development, which significantly stimulates the development of the scientific field and the introduction of innovations into the country's economy. A positive feature of the influence of the number of students studying in higher education institutions on the social sphere is the improvement in the quality of life, allowing people to improve their social status and find work with higher wages.

The number of students who receive education in higher educational institutions is an important source of human, scientific and cultural potential for the development of the country. An increase or decrease in the number of students currently can greatly affect the corresponding figures in the future.

According to official statistics, the number of students studying at universities is growing every year, while non-state (private) higher education institutions are gaining great popularity among applicants (Table 3).

Table 3: Dynamics of the number of university students in Uzbekistan (thousand people)

Year	State		Non-state		Branches	
	Qty	Pace growth, %	Qty	Rates of growth, %	Qty	Rates of growth, %
2012 / 2013	258.4	–	–	–	4.4	–
2013/2014	259.3	100.3	–	–	5.7	129.5
2014/2015	261.4	100.8	–	–	7.1	124.6
2015/2016	264.3	101.1	–	–	8	112.7
2016/2017	268.3	101.5	–	–	9.3	116.3
2017/2018	297.7	111.0	–	–	10.4	111.8
2018/2019	360.2	121.0	1.3	–	12.6	121.2
2019/2020	441	122.4	4.7	361.5	15.4	122.2
2020 / 2021	571.5	129.6	9.4	200.0	19.8	128.6
2021 / 2022	808.4	141.5	37.9	403.2	25.3	127.8
2022 / 2023	1040.4	128.7	91.5	241.4	30.1	119.0

Statistical data allows us to clearly understand how the dynamics of the number of students in higher education institutions has changed. If in state universities and branches of foreign universities this dynamics shows a moderate increase, then in the last few years non-state (private) universities have seen a sharp increase in students. In the 2022/2023 academic year, the number of students studying in private universities was 91.5 thousand, which is 70 times higher than in 2018/2019.

An explanation for this may be that non-state (private) higher education institutions often offer more flexible forms of study that allow students to combine study with work or other commitments. It is also common for curricula at private universities to be more focused on specific practical skills, which can be important for those looking for a job after graduation. Secondly, private universities often have better infrastructure and can provide more comfortable learning conditions than public universities. And finally, private universities often have a more modern and diverse curriculum, which allows students to choose the areas that are most interesting and promising for their future career.

In public universities in the Republic of Uzbekistan for the 2022/2023 academic year, the number of students at the first stage of academic higher education (bachelor's degree) is 1007.6 thousand people, of which 478.2 thousand people are women, 529.4 thousand people are men, and 32.8 thousand people receive a master's degree, of which 17.3 thousand people are women, 15.5 thousand people are men.

These figures indicate that the country is creating equal opportunities for all students regardless of their gender and ensuring gender equality, since dividing students by gender can lead to missed opportunities to develop important social skills such as communication and interaction with people from different backgrounds, social and cultural groups. It can also hinder the development of a broader outlook and understanding of social issues and differences.

It should be noted that higher education institutions have an important need for personnel with advanced degrees, as they have in-depth knowledge and expertise in their fields and can contribute to scientific knowledge through original research. Research helps universities grow, attract grants and support, and improve their reputation.

Secondly, faculty with advanced degrees teach and impart current knowledge and skills in their field to students. Academic teachers can also inspire and motivate students with their research achievements and experiences.

Third, personnel with advanced degrees can help develop relevant and high-quality programs that meet the demands of the labor market and the needs of students. They can also make changes to programs based on their research and new trends in their field.

Fourth, personnel with advanced degrees can be valuable consultants to other scientists, students, and external organizations. Their expertise can be used for project development, problem solving and consulting in a variety of areas.

In the Republic of Uzbekistan, in accordance with the Decree of the President of the Republic of Uzbekistan, dated February 16, 2017 No. UP-4958 "On further improvement of the postgraduate education system," a two-level system of postgraduate education has been introduced, the first level is basic doctoral studies, which is crowned by the defense of a dissertation and the award of the scientific degree of Doctor of Philosophy - PhD in the relevant

branch of science, second stage - doctoral studies with the defense of a dissertation and the award of the academic degree of Doctor of Science - Doctor of Science (DSc).

According to statistical data for the 2022/2023 academic year, the number of teachers in higher educational institutions with an academic degree is 41,746, of which candidates of sciences and doctors of philosophy (PhD) - 10,819, doctors of science (DSc) - 2,585. These indicators indicate that compared with the base year (2012/2013), the growth rate was 183.3%, and in the previous year - 111.7% (Table 4).

In general, the availability of personnel with advanced degrees is necessary for universities to provide high quality education, conduct research and develop their activities. They are the backbone of the university community and make a significant contribution to the development of scientific, educational and innovation spheres.

Table 4: Number of teachers in universities with academic degrees

Year	Doctor of Science (DSc)		Doctor of Philosophy (PhD)		Candidates of Science	
	Qty	Pace growth, %	Qty	Rates of growth, %	Qty	Rates of growth, %
2012 / 2013	1432	96.4	-	-	7281	101.5
2013/2014	1371	95.7	-	-	6831	93.8
2014/2015	1376	100.4	-	-	6767	99.1
2015/2016	1320	95.9	-	-	6291	93.0
2016/2017	1309	99.2	-	-	6120	97.3
2017/2018	1470	112.3	-	-	6011	98.2
2018/2019	1694	115.2	-	-	6401	106.5
2019/2020	1811	106.9	1081	-	6181	96.6
2020 / 2021	1982	109.4	2011	186.1	5924	95.8
2021 / 2022	2175	109.7	3151	156.6	6119	103.3
2022 / 2023	2585	118.9	5100	161.8	5719	93.5

By the Presidential Decree “On measures to provide financial independence to state higher educational institutions” dated December 24, 2021, universities in Uzbekistan received financial independence and freedom of action. This became the basis of their well-being and resilience. The introduction of this legislative document allowed universities to intensify the commercialization of scientific activities and create conditions for the development of entrepreneurship and business, as well as speed up the implementation of innovative developments.

In the structures of higher educational institutions, the subjects responsible for this area have not previously received such attention. The university was mainly focused on the educational process, not having a close connection with new trends and challenges of our time, such as detailing and digitalization of the educational process, bringing university science closer to business incubation and commercialization of innovative developments. In the criteria for assessing international university rankings, these aspects are key. In terms of the degree of science intensity and level of commercialization, they give universities high scores. It was these demands that formed the basis for reforms in the higher education system.

If we look at the statistical data presented by the Ministry of Education, Science and Innovation of the Republic of Uzbekistan, then since the acquisition of financial independence, higher education institutions with the highest income have been identified throughout the country (Table 5).

The income of universities was formed from the following indicators:

- funds financed from the budget (25% of total income);
- receipts for training on a paid contract basis (71.6%);
- income from development funds (3.4%)

In 2021, among the universities in the republic with the highest profit was Tashkent State Pedagogical University. Nizami, with a total income of 398,619 million soums, followed by Namangan State University with 320,567 million soums and the Mirzo-Ulugbek National University of Uzbekistan with an income of 315,449 million soums closes the top three.

Table 5: Information on annual income and expenses of state higher educational institutions (million soums, as of January 1, 2022)

No.	Higher education institution	Income	Expenses	Difference
1	Tashkent State Pedagogical University named after. Nizamiy	398 619	139 256	+ 259 363
2	Namangan State University	320 567	241 888	+ 78 679
3	National University of Uzbekistan	315 449	293 327	+ 22 122
4	Urgench State University	308 789	312 348	- 3 559
5	Karakalpaksy State University	286 134	234 022	+ 52 112
6	Tashkent State Technical University	276 072	253 242	+ 22 830
7	Bukhara State University	251 734	244 808	+ 6 926
8	Termez State University	251 213	225 929	+ 25 284
9	Tashkent State Economic University	237 407	188 113	+ 49 294
10	Fergana State University	233 458	187 662	+ 45 796
11	Karshi State University	232 780	170 980	+ 61 800
12	Samarkand State University	216 655	228 884	- 12 229
13	Kukand State Pedagogical University	212 506	161 320	+ 51 186
14	Andijan State University	211 774	225 150	- 13 376
15	Uzbekistan State University of World Languages	210,000	194 196	+15 804

For 2022, the highest total income in the republic was shown by the National University of Uzbekistan (435 billion soums), Tashkent State Pedagogical University named after Nizami (371 billion soums), Fergana State University (368 billion soums), Urgench State University (365 billion soums) and Samarkand State University (351 billion soums).

The universities with the highest net profit in 2022 were Tashkent State Economic University (106.2 billion soums), Namangan State University (67.7 billion soums), Karakalpak State University named after Berdakh (54.4 billion soums), Gulistan State university (54 billion soums), Navoi State Pedagogical Institute (43.2 billion soums).

Accordingly, one of the factors for the financial success of these higher educational institutions may be effective marketing strategies, since marketing has a direct relationship with the income of higher educational institutions, since:

1. Advertising and attracting students: The marketing efforts of educational institutions are aimed at attracting more students. This can be achieved through media advertising, creating an attractive website, participating in job fairs, holding open days and other events. The more students an institution enrolls, the more revenue it generates.
2. Pricing Management: Marketing research helps educational institutions determine the optimal price for education and balance supply and demand. Proper pricing management helps maximize revenue without losing student interest.
3. Development of new programs and courses: Marketing research allows universities and colleges to determine the popularity and demand for new programs and courses. Creating and offering new educational programs that attract more students helps increase the institution's revenue.
4. Cooperation with employers: Universities and colleges, using marketing, can cooperate with employers and provide students with internships, internships and employment opportunities after graduation. This makes the educational institution more attractive to potential students and helps them get jobs after graduation. Such partnerships can help increase student enrollment and, as a result, increase revenue.

Overall, marketing plays an important role in attracting students, managing pricing, developing new programs, and collaborating with employers, which in turn impacts higher education institutions' revenues.

The analysis of the market for educational services and higher education products must be supplemented with a research focus on the internal problems of marketing management of educational organizations. Currently, they are faced with challenges related to ensuring stable functioning, sustainable development and systematic implementation of the socio-economic function of generating qualified labor resources and human capital for the economy of not only the region, but also the country as a whole.

The development of a modern educational organization in an ecosystem format involves the unification of independent business units within a common operating cycle. This ensures the functioning of complete value chains in various areas of activity of universities, such as education, research and development and international activities.

The main goal of this approach is to actively participate in the global “knowledge economy” and take a stable position in advanced scientific areas.

There are two main concepts for the development of modern educational organizations in an ecosystem format, which assume the presence of permanent or temporary/project business units with an emphasis on research and/or educational activities.

The first includes the integration approach, which is primarily aimed at partnership with a target circle of organizations, where the innovation process is divided into search and implementation, respectively, each of the partners performs its assigned tasks.

The second we can include the development of the ecosystem as a “multi-platform model”, which implies completely independent activity in several areas, including educational (transfer of professional knowledge), research (projects, grants, etc.) and entrepreneurial (business agreements, additional education , courses, etc.).

In order to study the main elements of marketing in the context of the development of modern educational organizations in an ecosystem format, we will look at the example of the Tashkent State Economic University.

The university has a long history and provides an opportunity to trace the thorny path of development of economic education in the country. Speaking briefly about history, the Tashkent State Economic University was created on August 13, 1931 as the Central Asian Financial and Economic Institute, later transformed into the Tashkent Financial and Economic Institute, and in 1962-1991 it operated under the name Tashkent Institute of National Economy. Since June 19, 1991, it has operated as the Tashkent State Economic University (TSEU). Today the university is one of the largest economic universities in the Republic of Uzbekistan and Central Asia.

Quantitative indicators that are indicators of its achievements can be used as a measure of the success of a university’s activities.[15]

In scientific studies devoted to quantitative analysis of the activities of universities, the most common approach is to consider current indicators or absolute changes in their work. With this approach, large universities that have demonstrated consistently high performance tend to be among the leaders. This assessment reflects the structure of the higher education market and allows us to identify the leading participants at the time of data analysis. An alternative approach to studying the performance of universities is also possible, based on assessing the growth rate of indicator values that reflect the development of key areas of activity. When using this approach, economies of scale are not a significant factor in assessing results. Universities are compared against each other on their ability to develop and achieve better results over time.

The availability of statistical data allows us to analyze changes over a five-year period in TSUE performance indicators in key areas and identify the relationship between various indicators (Table 6).

Table 6: Performance indicators of TSUE activities

Indicator	Activities	Quantitative indicator
E 1	Educational activities	Number of students of higher education institution
E 2	Research activities	Number of publications indexed in international scientific databases Scopus and WOS
E 3	International activity	Share of foreign students from the total number of students (%)
E 4	Financial and economic activities	University income from all sources per student (million soums)
E 5	Infrastructure	Total area of teaching and laboratory premises per student (m ²)
E 6	Personnel composition	Share of teachers with an academic degree in the total number of teaching staff (%)

Let's consider changes in the values of six performance indicators of the Tashkent State University of Economics for the period from 2016/2017 to 2021/2022.

In general, during the study period there was a general positive trend in changes in the performance indicators of universities. However, it should be noted that in some years the growth of a number of indicators slowed down, and in some years there was a slight negative trend in their change.

In the IBM software package SPSS performed a correlation analysis of possible relationships between the six considered indicators, which are displayed in Table 7.

Table 7: Correlation matrix of TSEU performance indicators [16]

	E 1	E 2	E 3	E 4	E 5	E 6
E 1						
Pearson correlation	1	.985**	.888*	.860	-.519	.819
meaning (double-sided)		.002	.044	.062	.370	.090
N	5	5	5	5	5	5
E 2						
Pearson correlation	.985**	1	.895*	.796	-.564	.803
meaning (double-sided)	.002		.040	.107	.322	.102
N	5	5	5	5	5	5
E 3						
Pearson correlation	.888*	.895*	1	.912*	-.817	.916*
meaning (double-sided)	.044	.040		.031	.092	.029
N	5	5	5	5	5	5
E 4						
Pearson correlation	.860	.796	.912*	1	-.675	.912*
meaning (double-sided)	.062	.107	.031		.211	.031
N	5	5	5	5	5	5
E 5						
Pearson correlation	-.519	-.564	-.817	-.675	1	-.860
meaning (double-sided)	.370	.322	.092	.211		.061
N	5	5	5	5	5	5
E 6						
Pearson correlation	.819	.803	.916*	.912*	-.860	1
meaning (double-sided)	.090	.102	.029	.031	.061	
N	5	5	5	5	5	5

Note: 1. Pearson correlation coefficients were calculated. 2. Statistically significant coefficients are highlighted in bold. 3. Level of statistical significance (p-value): * 5%; ** 1%.

Calculations showed that there are direct, weak, statistically significant relationships between some variables. The indicator of publication activity of the teaching staff is positively correlated with all others except the indicator of infrastructure. We can say that a university that has high development rates in several areas at once is characterized by a high level of qualifications of employees capable of achieving positive results in educational and scientific activities.

4. CONCLUSIONS

The international activity indicator also has a strong relationship with other indicators. This indicates that the university is actively recruiting international students.

The infrastructure indicator has no relationship with other indicators. It can be assumed that the total area of teaching and laboratory premises does not greatly affect the educational and scientific activities of both students and teaching staff.

The results obtained indicate that the activities of the Tashkent State Economic University are developing in several directions at once, since almost all statistically significant correlation coefficients are positive.

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