



INTERNATIONAL EDUCATION SERVICES

Wider Europe - Covid-19 update webinar - 21.04.20



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COVID-19 UPDATE TURKEY

Agenda



- New normals of life in Turkey
- Education sector's response: schools and universities
- Recruitment market: insights on student behaviours
- Competitor markets' actions
- How to keep presence in the market

New normals of life in Turkey

Coronavirus [+ Add to myFT](#)

Erdogan under pressure as Turkey's coronavirus toll mounts

Calls grow for full lockdown but president says economy must continue to function



Istanbul's mayor has warned about the number of people still out and about in the city as 1.2m continue to use public transport each day © Umit Bektas/Reuters

euronews.



VIEW

Turkey's approach to COVID-19 deserves more attention and less fake news | [View](#)  COMMENTS

07/04/2020

By **Nail Olpak**

Opinions expressed in View articles are solely those of the authors.

A controversy recently broke out on social media over the New York Times, CNN and the BBC featuring photos of Turkey in their coverage of the COVID-19 pandemic. The outlets published photographs of well-known Turkish landmarks in a manner that seemed to portray Turkey as a hotspot of the outbreak. The incident left people in Turkey scratching their heads because at the time, we only had one confirmed case of the virus and had begun implementing restrictions to stem its spread.

Turkey is worth talking about, however, because our response to the pandemic is relevant beyond our borders, even more so than some others. As the bridge between Europe and Asia - the home of one of the largest, most highly-trafficked airports in the world, and a state bordering one of the original hot zones, Iran - the way in which we manage the COVID-19 outbreak matters to the global response.

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Education sector's response

25 million students are affected by school closures

- schools until 30 April,
- universities until 15 May

- Distant education (online and TV) is introduced for primary and secondary education
- Centralised university examinations are postponed
- Over 100 universities started delivering education online in varying degrees.
- HE students are allowed to suspend their studies for spring term
- No Erasmus in Autumn 2020/21



Recruitment market: insights on student behaviours

Feedback:

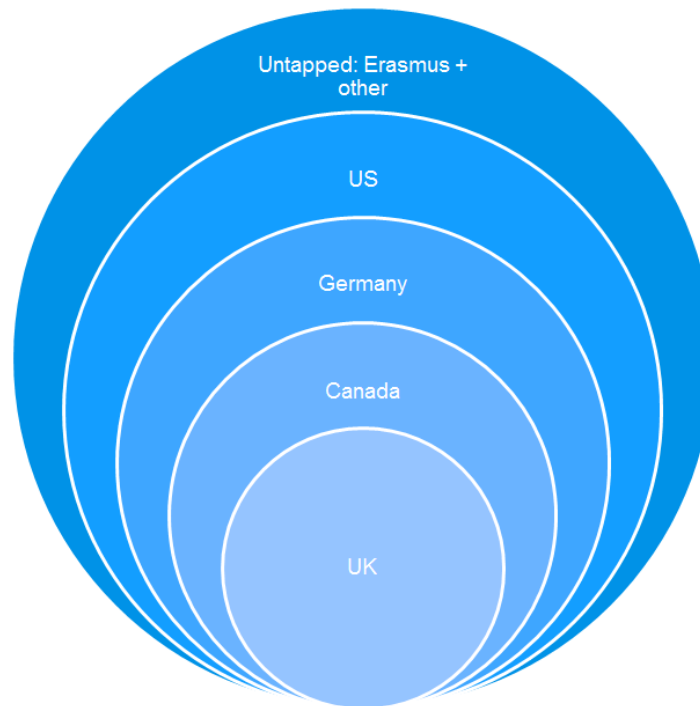
- Turkish students are highly committed for studying abroad
- Current situation is in short-distance countries' favour
- Questions around UK universities' approach to conditional offers
- Student survey to analyse students' motivation is underway

Questions around

- How will you assess students' English level?
- What happens to students with conditional offers? Will you change them to unconditional ones?
- How 11th graders can prepare for their applications next year?

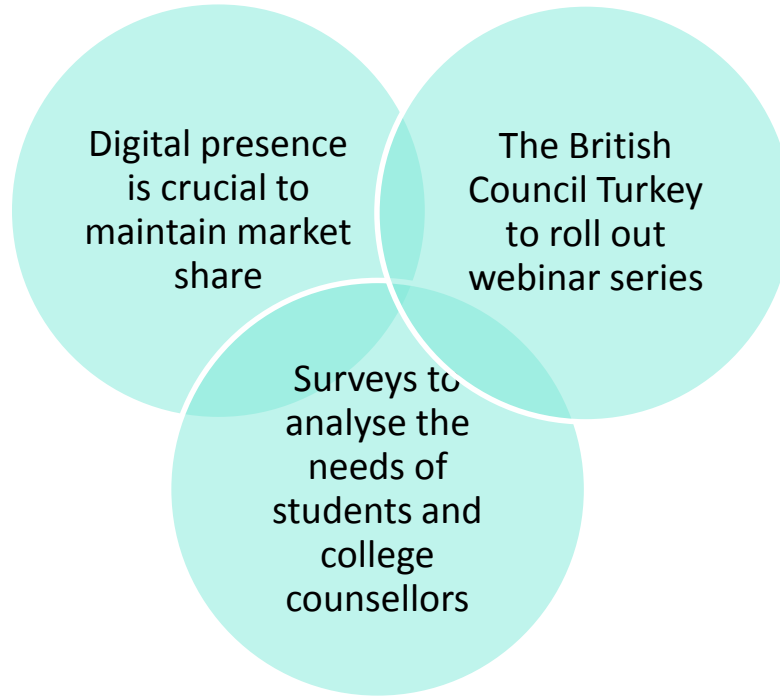
Competitors

- Change of priorities as a response to Covid-19
- Face-to-face events are replaced by online delivery
- Cautious approach to promotional activities



US: >10K
Germany: > 7K
Canada: 4.5K
UK: 3.6K

How to keep presence in the market?





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COVID-19 UPDATE
RUSSIA

RUSSIA

COVID-19 lockdown/April is a non-working month

Distant learning HEIs and schools

School exams re-scheduled
University entry exams remotely

Academic and student mobility on hold



RUSSIA

New Minister of Science and Higher Education– Valery Falkov

E-learning in the new academic year? What will be the role of digital in the post COVID-19 world?

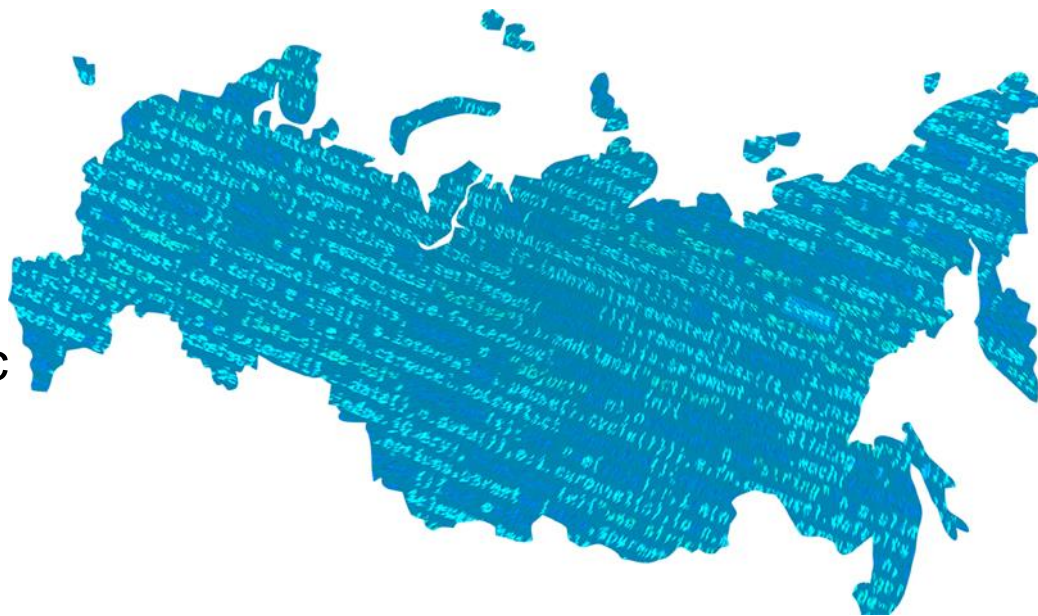


RUSSIA

Agents opinions:

- Summer programmes cancelled
- 15% cancellations of academic programmes
- Expected boom in demand for 2021-22

Opportunities for digital

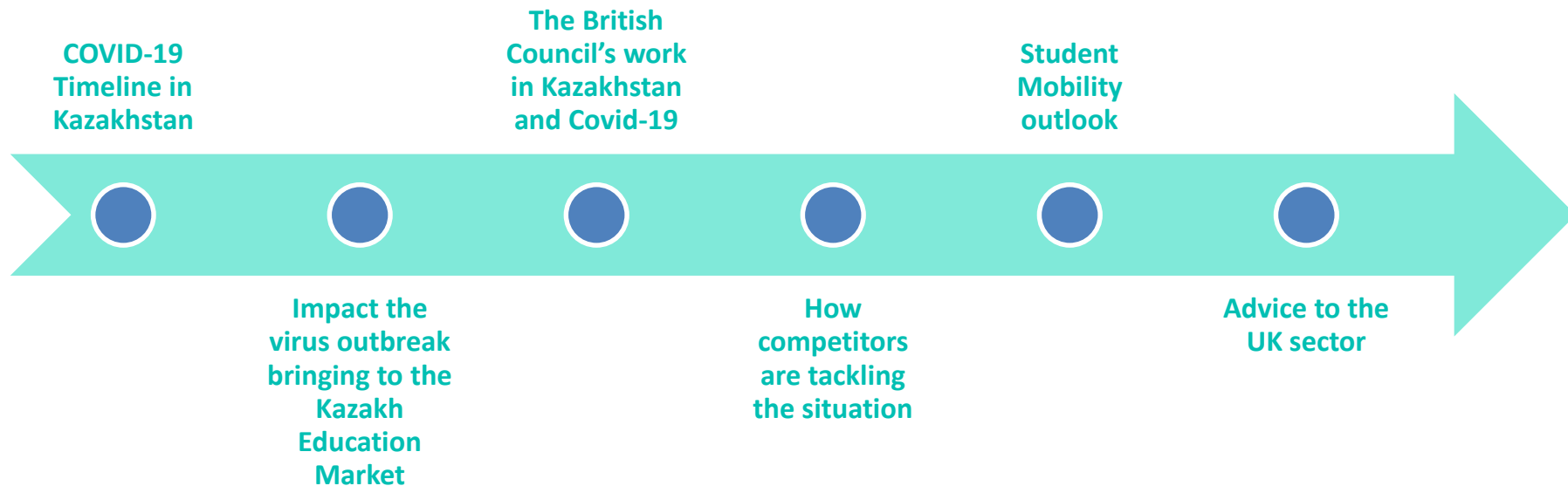




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COVID-19 UPDATE KAZAKHSTAN

Agenda



COVID-19 Timeline in Kazakhstan

16 Mar **State of emergency** announced

19 Mar **Lockdown** in Almaty and Nur-Sultan

30 Mar - 5 Apr All **businesses** are told **closed** – subsequently extended till end of April

6 Apr Distance learning: **Televised lessons** broadcast on a few national TV channels

16 Mar University/TVET students start **online learning**

19 – 30 Mar **International flights** to Almaty and Nur-Sultan are **stopped**

2 Apr **Online lessons** for schools students piloted

How does the lockdown look like in Kazakhstan?



How the virus outbreak impacts the Education Sector in Kazakhstan



Challenges:

- Not all education facilities and families are ready to move to e-learning
- Difficulties holding assessments and exams
- Online teaching expertise need enhancements
- Students under the lockdown pressures are demotivated
- “Double crisis” – fall in oil prices and Tenge devaluation
- With most businesses closed, those who were planning to go for studies abroad in 2020 are uncertain



Opportunities:

- Education sector is able to pilot, test and improve e-learning
- Students are becoming more independent in studies
- Huge leap in acquiring new knowledge and skills through online courses
- Students have time to think and learn what skills and knowledge they want to have, which is a good thing for their choice of specialism

British Council's work in Kazakhstan and Covid-19



What the competitors are doing

Education USA:

- Webinars and courses for English teachers
- Kazakh language courses
- Education USA online consultancy
- A series of Education USA webinars
- Choosing a US university webinars
- FLEX school students exchange programme online webinars

Study in Canada:

- Extended deadlines for Scholarship schemes
- Students may complete up to 50% of their first year online if they are unable to travel to Canada because of COVID-19

Student Mobility outlook



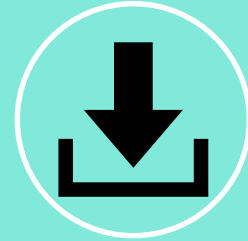
In 2020, student mobility from Kazakhstan to slow down



Some parents uncertain



Small number of students in 2020



Cheaper countries/local elite HEIs on the table



International student number increase in 2021-2022



Advice to the UK sector

Keep your market presence and profile raising activities

Equip with digital marketing strategies

Work with local institutions for TNE opportunities and government bodies

Engage with agents and counsellors

Launch free webinars, online learning courses both for prospective students

Promote the post-study work visa opportunities



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COVID-19 UPDATE UZBEKISTAN

Agenda



- State response to Covid-19
- Education sector: How schools and Universities responding
- The British Council's response
- Main challenges and opportunities
- Competitors
- Some facts and figures

State response to Covid-19



- March 24 – April 20, 2020: full lockdown of Tashkent and all regional centers
- April 18, 2020: restrictive measures extended until May 10.
- Tashkent - the most disciplined city during quarantine in CIS according to Yandex with almost 100%

Stats: 1,565 cases of coronavirus are affected, 238 patients recovered, and 5 deaths were recorded

Education sector's response

- Online and TV education is introduced for primary and secondary education
- Call to individuals and organisations with online education experience to support ministry
- All Universities moved to online education
- MHSSE announced extension of distance learning and end the current academic year until July 1
- At the same time, teaching staff is transferred to the remote work mode
- Bachelor graduates will take state exams in the form of online tests. To this end, university leaders were instructed to carry out organizational and methodological work
- State certification for graduate masters will also be organized in the form of online presentations

Main challenges and opportunities

Challenges:

- Not all education institutions and students are ready to move to e-learning – no experience and expertise
- No online resources and course content/methodology
- Difficulties holding assessments and exams
- Lockdown pressures
- Economic pressures: budget cuts, savings, scholarships

Opportunities for UK:

- Education sector is able to pilot, test and improve e-learning
- Opportunity to form TNE collaborations with local HEIs
- Great need for online learning and assessment solutions
- Digital marketing to students as they are becoming more independent
- Webinars on Study UK and other available study programmes
- Work with education agents and agencies
- Student surveys

British Council's response

1. For English teachers (higher and public education)
 - Widely introduce a globally offered Stayhome package
2. For PRESETT and ESP teams a series of webinars on ELT
 - Changes in English ,
 - Assessment of grammar in context,
 - Reading skills improvement.
3. Within HEfE project
 - Webinar on Data Management for QA in HE
 - Change Academy Continuity Support webinar



Competitors

- Change of priorities as a response to Covid-19
- Face-to-face events are replaced by online delivery
- Webinars and courses for English teachers
- Extended deadlines for Scholarship schemes
- Choosing a US university webinars

SOME FACTS AND FIGURES

Numbers of Uzbek students entering HE

- In 2019, 1 066 922 pupil applied for 110,000 places available in HE sector
- Almost 92% of school leavers expressed their intention to enter a university in 2019
- 56.8% intend to apply at the place of residence – 43% want to apply higher education institutes located in Tashkent.
- In aggregate, almost 80% in case of non-enrolment intend to use other opportunities of getting higher education – 7.6% will go to the extramural studies, 15.4% will try to enrol in foreign universities and 56.3% will prepare to enrol next year.
- Highest competition to enter local university was at National University of Uzbekistan – 29.47 pupil to 1 place. In average for Uzbekistan as a whole 10.28 people applied for 1 place available.

SOME FACTS AND FIGURES

Number of places available for Uzbek students in Uzbek HEIs

- Bachelor – 80,430
- Distance HE Bachelor – 19,985
- Evening Shift HE Bachelor – 1,985
- Masters – 7,695

Number of Uzbek students going abroad for HE

- It is estimated around 80K students went abroad to study in 2020
- Most to Russia, China, Korea and Baltic states
- UK: HESA stats in 2018 – 200, 2019 – 230

Info we have on size of the market of those considering taking a TNE delivered course

- In 2019 survey showed that 15.4 % of pupil wanted to apply for foreign HEs in Uzbekistan. That is 164,306 pupils

SOME FACTS AND FIGURES

TNE relations with Uzbek partners

- Since 2017, 9 new international universities have been set up with TNE providers from Russia, US and South Korea
- New “El Yurt Umidi” Foundation offers over 1,000 scholarships annually: in 2018 - 112 scholarship winners went to the UK, in 2019 – 90 scholarships (tbc)
- The total number of HEIs has been increased from 77 in 2016 to 109 in 2019.
- 16 new joint programmes have been introduced in cooperation with prestigious overseas universities.
- Two UK providers started delivering their foundation programmes in Uzbekistan since 2017
- We had visits by: University of Bath, Coventry University, Edinburgh College

Partnering with UK orgs to deliver TNE course

- National Higher Education Reform Decree requires all local universities to teach at least one programme in English by 2020. This means almost every University is looking for partnership opportunity.



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Q&A Session

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