

Market Intelligence Brief

POLAND



2019/2020



INTERNATIONAL
EDUCATION
SERVICES

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1. AT A GLANCE



Market background

- Poland has had remarkable economic growth since its economic transition in 1989. The country moved from middle- to high-income status in less than 15 years without increasing income inequality. Annual GDP growth in 2019 was 4.1 per cent. Growth is expected to contract by up to 4.6 per cent in 2020 due to the Covid-19 pandemic and global economic downturn.
- The major drivers of economic growth in Poland are the services sector, particularly business services, and low-cost manufacturing, especially the automotive industry. The country has impressively low levels of unemployment at 3.3 per cent in 2019 and is becoming an increasingly attractive destination for FDI. However, the country must upskill its workforce to drive innovation as the economy grows and wages rise.
- One of Poland's major challenges is its demographics crisis. Birth rates are among the lowest in the EU and the working-age population has declined by 1 per cent every year since 2012.



Local education trends

- Poland's education system has undergone dramatic reform since 1999, resulting in marked improvement in performance. In the OECD PISA 2018 study, Poland ranked in the top five in all three subjects, though the assessment took place before the latest education reforms came into effect.
- Compulsory education lasts for nine years, beginning in the final year of preschool and ending with the last year of primary school. After completing primary school, students can go on to secondary school or vocational training programmes.
- Poland's strong technical and vocational education and training (TVET) provision means that there is near universal enrolment in secondary education programmes. In 2017, 45 per cent of upper secondary graduates in Poland attained a vocational qualification, compared with an OECD average of 40 per cent.
- Full-time studies at public higher education institutes is free of charge for Polish students. In 2018, higher education attainment was 45.7 per cent, exceeding the Europe 2020 national target for Poland of 45 per cent. The number of students enrolled in higher education has decreased by 36 per cent over the last decade in line with demographic trends.



International education

- The UK is by far the most popular destination for internationally mobile Polish tertiary students. In 2018/19, 8,845 Polish students were studying at UK HEIs, a 10 per cent increase from the previous year and the fourth consecutive year of growth. The UK is primarily an undergraduate destination and the most popular subject areas were business and administrative studies, creative arts and design and biological sciences.
- Other popular destinations for Polish students are Germany, France, Denmark, the US, Italy and the Netherlands. Poland has bilateral exchange agreements with 21 countries and the Polish government offers some scholarships and grants for Polish students to study abroad.
- Poland is not a major market for transnational education programmes and is not a major host of international branch campuses. In 2018, Coventry University announced plans to become the first foreign university to have an independent campus in Poland and is set to welcome its first student intake in September 2020, depending on Covid-19 restrictions.
- Poland has set an ambitious target to attract 100,000 international students by 2020. In 2018/19, Poland hosted more than 78,000 international students, an increase of 560 per cent in just 12 years. The largest sending countries are Ukraine, Belarus and India.

2. INTRODUCTION

The Republic of Poland serves as a remarkable success story in economics and education since its transition from a communist system after 1989. Within 15 years, the World Bank upgraded the country to classify as a high-income country. Poland has successfully run fully democratic elections since the political transition.

Likewise, the education system has made incredible progress since major reform projects began in 1999. In the 2000 PISA study, Poland ranked well below the OECD average in the three key subjects of the assessment; mathematics, science and reading. In 2018, the latest PISA, Poland had progressed dramatically to rank in the top five overall – coming third in mathematics and sciences and fourth in reading among European countries.

The World Bank has said that Poland's impressive equality in economic growth can be attributed to high rates of education access across income groups and regions. With strong technical and vocational education and training from the secondary level, there is near-universal enrolment of 15- to 19-year-olds in education.

With rising incomes and improved local provision at the primary and secondary level, Polish students have increasingly been looking abroad for tertiary education. The UK has by far benefitted the most from this trend. In 2018/19, there were 8,845 Polish students at UK HEIs. The next most popular destinations were Germany, France, Denmark and the US. While the overall number of Polish students in the UK is still below the peak of just under 10,000 in 2008/09, the 2018/19 academic year marked the fourth consecutive year of growth as numbers rebound.

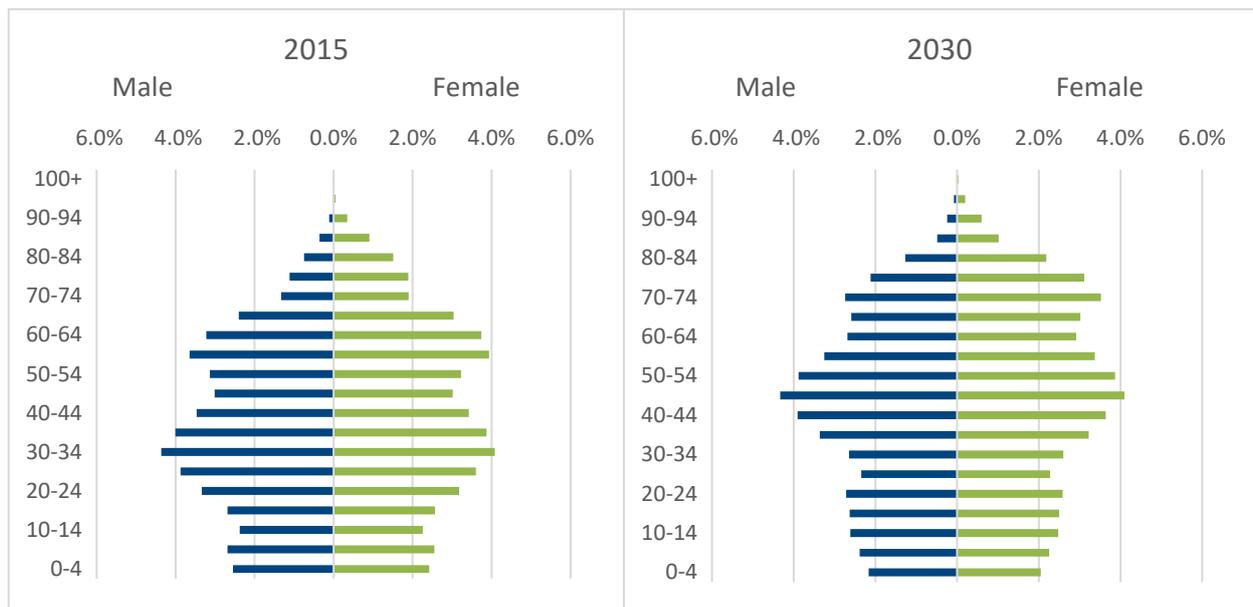
Moving forward, Poland has considerable challenges that must be tackled to ensure continuing equality and growth for the country's 38.4 million people. Like many European countries, it faces a demographics crisis: birth rates are among the lowest in the EU and the working age population has declined by 1 per cent every year since 2012. The youth population is similarly projected to continue to decline, reflected in the lower numbers of students enrolled in tertiary study.

Facing population decline, automation and rising wages, the country will be forced to move away from its current economic model as a low-cost manufacturing base for western Europe. Bolstered by low wages for skilled labour, there is a need for upskilling the workforce and more innovation. Education will play a major role in this according to Poland's development strategy, The Strategy for Responsible Development. The strategy emphasizes the importance of lifelong learning and encourages the education system – particularly TVET and higher education – to adapt to the needs of the modern economy.

3. DEMOGRAPHICS

At the end of 2019, Poland was home to nearly 38.4 million people, barely more than the 37 million people in 1989. Like many fellow European countries, Poland is facing a demographics crisis as the birth rate has dropped and the population ages. In 2019, deaths outnumbered births by about 35,000, while the birth rate was among the lowest in the EU. The fertility rate was just 1.4 births per female in 2019, well below the replacement rate of 2.2 births per female.¹ The ageing population has also caused the median age to rise by more than five years since 2000, reaching 41 in 2019.

Figure 1: Poland's population pyramid, 2015 and 2030



Source: UN WPP

This presents the most pressing challenge for Poland's economy moving forward. Since 2010, the working-age population has decreased by more than 1.5 million people, and this population bracket has declined 1 per cent per year since 2012.² Additionally, the number of those aged 65 and over is projected to more than double from 22 per cent in 2012 to 55 per cent in 2050. The 65 and over segment added 215,000 people in 2019, accounting for 18 per cent of the population.³ The growth in the elderly population will increase the dependency ratio, require increased spending on healthcare and pension, and impact labour productivity.⁴

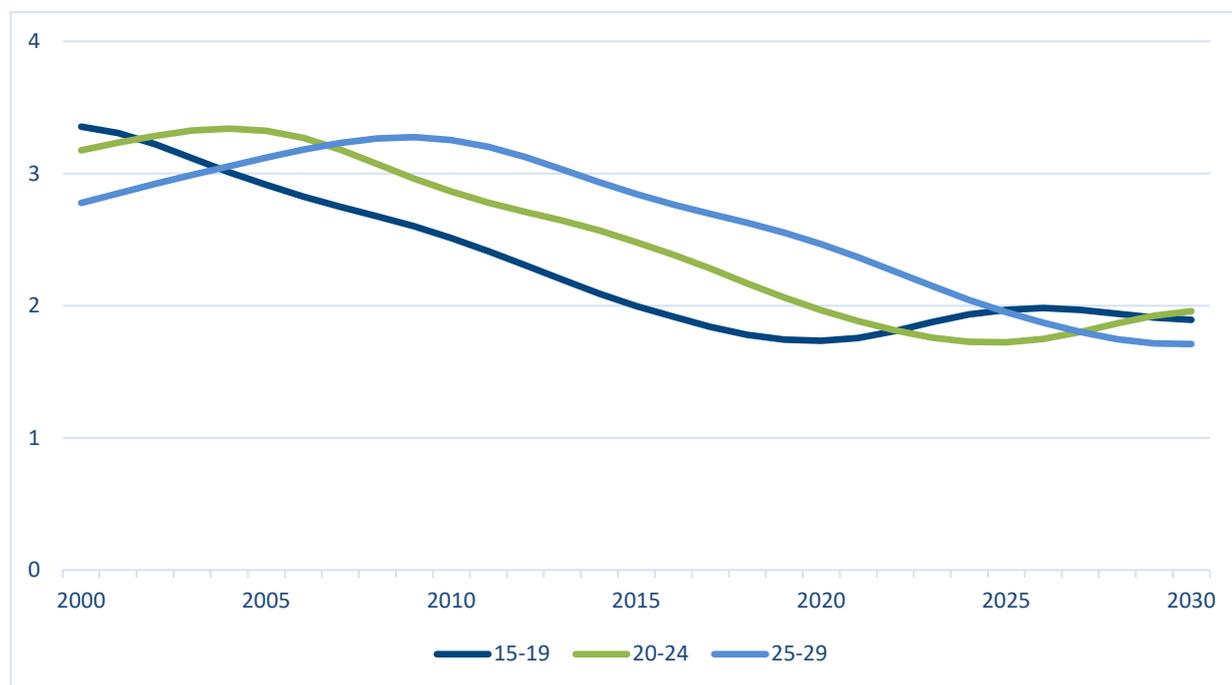
¹ [Poland: Country Profile](#), Euromonitor International, 8 June 2020.

² Ibid.

³ [Population. Size and structure and vital statistics in Poland by territorial division. As of December 31, 2019](#), Statistics Poland, 30 April 2020.

⁴ [Country Partnership Framework for Poland](#), World Bank Group, 2018.

Figure 2: Poland's student age population (millions)



Source: UN Population Division

As seen in Figure 2, Poland's under-30 population has declined significantly since the early 2000s. While the 15-19 age group is expected to see a small bump over the next five years, it will remain well below 2000 levels, falling to just 2.5 million around 2026. The 20-24 and 25-29 age brackets have likewise been in decline since 2005 and 2010, respectively. The 0-14 age group accounted for about 15 per cent of the total population in 2019, compared with 25 per cent in 1990 and 20 per cent in 2000.⁵

In recent years, Poland has seen an increase in immigration from Ukraine, Belarus, Nepal, and India and took in more workers from outside the EU in 2018 than any other EU country.⁶ In 2018, the number of Poles working abroad fell for the first time in eight years as many Polish people who sought to work abroad after Poland's accession to the EU are lured home.⁷ According to the national statistics agency, 2019 saw positive net immigration of 6,200 people, indicating that more people are immigrating than emigrating.⁸

Poland is one of the most homogenous countries in the EU in terms of ethnicity, with only about 3 per cent of the population identifying as national minorities. The government recognises nine national minorities (Belorussian, Czech, Lithuanian, German, Armenian, Russian, Slovak, Ukrainian and Jewish) and four ethnic minorities (Karaim, Lemko, Romany and Tatar). The overwhelming majority of the Polish population are Roman Catholic (87 per cent).⁹

⁵ [Population. Size and structure and vital statistics in Poland by territorial division. As of December 31, 2019](#), *Statistics Poland*, 30 April 2020.

⁶ [Poland is cocking up migration in a very European way](#), *The Economist*, 22 February 2020.

⁷ [Tide turns for Polish emigres, lured home by booming economy](#), *Financial Times*, 10 December 2019.

⁸ [Population. Size and structure and vital statistics in Poland by territorial division. As of December 31, 2019](#), *Statistics Poland*, 30 April 2020.

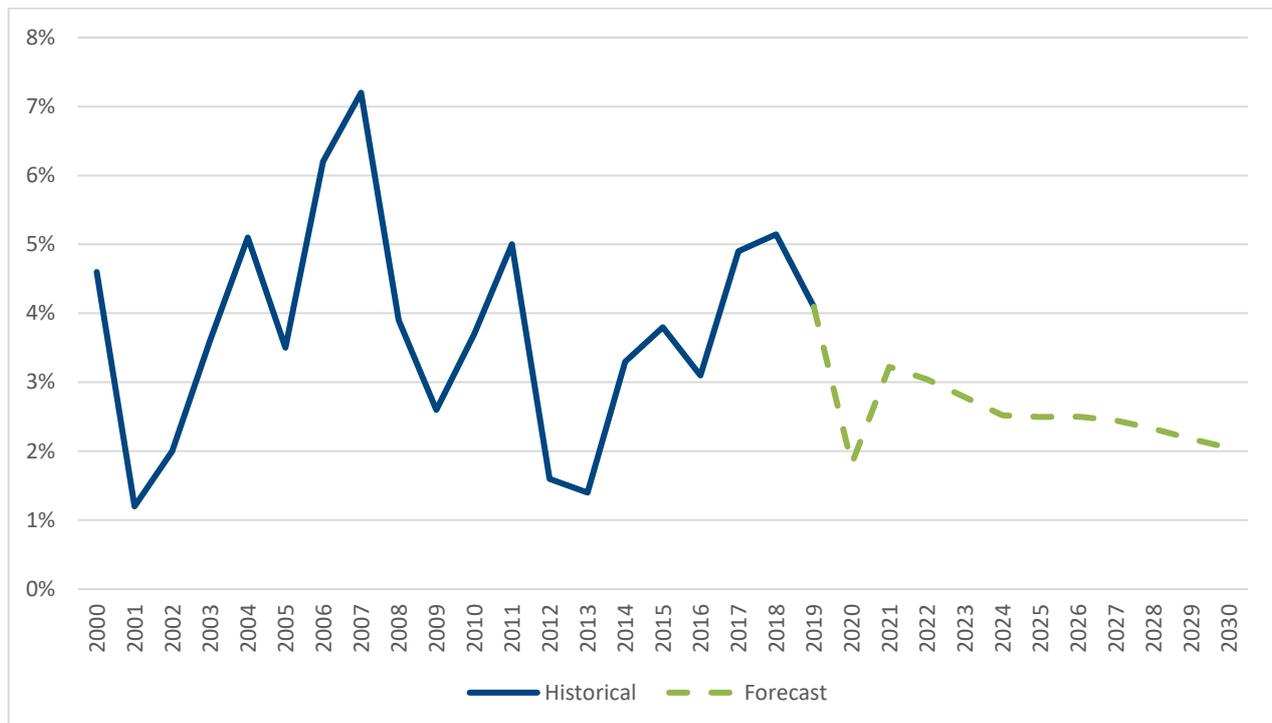
⁹ [Poland: Population: Demographic Situation, Languages and Religions](#), *Eurydice*, 19 December 2019.

4. ECONOMICS

Since its transition to a market economy after 1989, Poland has been one of the fastest-growing economies in Europe. Poland moved from middle to high-income status in less than 15 years, which the World Bank calls “remarkable.” The country’s economic success has been attributed to a shared vision for reform, policy continuity spanning 17 governments and proper sequencing of reforms anchored by EU accession.¹⁰ Despite the rapid economic expansion, Poland’s Gini coefficient (a measure of income inequality) did not change, and the country still the lowest income inequality among new high-income countries.¹¹

Poland has experienced nearly three decades of strong economic growth and was the only EU member country to avoid recession during the 2008 financial crisis.¹² Annual real GDP growth in 2019 was 4.1 per cent, lower than the 5.3 per cent of the previous year, but much higher than the decade low of 1.3 per cent in 2003. However, the Covid-19 pandemic caused major interruptions to economic activity and a global economic downturn, which may cause Poland’s real GDP to contract by up to 4.6 per cent in 2020.¹³ Growth is expected to bounce back to 4.2 per cent in 2021. Overall, economic growth has been supported by high consumer confidence, private consumption and a strong labour market.¹⁴

Figure 3: Real GDP Growth and forecast



Source: IMF, Euromonitor forecasts

Poland has followed a model of being a low-cost manufacturing centre for western Europe. Manufacturing accounts for 19.1 per cent of GDP and employs 22 per cent of the workforce. The

¹⁰ [Lessons from Poland, Insights for Poland: A Sustainable and Inclusive Transition to High Income Status](#), World Bank, 2017.

¹¹ New high-income countries are countries that have become high-income since 2000.

¹² [Country Partnership Framework for Poland](#), World Bank Group, 2018.

¹³ [Poland: Country Profile](#), Euromonitor International, 8 June 2020; [Poland and the IMF](#), IMF, accessed July 6 2020.

¹⁴ [Poland: Country Profile](#), Euromonitor International, 8 June 2020.

automotive manufacturing sector accounts for 8 per cent of GDP, mostly focused on producing car parts and accessories that are exported to Germany.¹⁵

As the economy grows and wages rise, this strategy is becoming less sustainable. Exports are still a major source of income, representing 44.7 per cent of GDP in 2019, a 0.2 per cent increase from the previous year. Exports are expected to fall by about 1 per cent in 2020. The final form of Brexit may have a major impact on the Polish economy as the UK is one of Poland's top export markets.¹⁶ Thus, Poland is seeking to upskill its workforce and increase innovation in order to support future economic growth.

The country's services sector is very strong, accounting for 63.5 per cent of GDP. Business services in particular are a strong contributor and Poland accounts for about 70 per cent of business services centres in Central and Eastern Europe. There are more than 1,000 centres around the country, including shared service centres, processing operations (such as IT centres) and R&D centres, such as in software development.¹⁷

Agriculture employs 9.4 per cent of the workforce and accounts for between 3 and 4 per cent of GDP. About 60 per cent of the country's land area is used for agricultural purposes and nearly 90 per cent of farms are private. Most of the agricultural products produced locally are also consumed locally.

Poland is the world's ninth-largest producer of hard coal. The fuel generates most of the country's electricity and the sector employs about 100,000 people. However, Polish coal is more expensive to produce and costs US\$10-20 more than imported coal, which has led to an increase in imported coal as a cost-saving measure.¹⁸ The resulting upheaval in the domestic coal industry led Polish state-run power producers to halt coal imports in February 2020.¹⁹ Poland is also under pressure from the European Commission to reduce its reliance on coal.

The 2018 budget deficit was equal to 0.2 per cent of GDP in 2018 and 0.7 per cent in 2019. The deficit is expected to rise to an equivalent of 6.5 per cent of GDP in 2020 due to increased public spending to contain the pandemic and support the economy. Public debt was equivalent to 47.6 per cent of GDP in 2019, below the constitutionally mandated limit of 55 per cent of GDP.²⁰

Poland's unemployment rate reached a remarkable low of 3.3 per cent in 2019, down from 5.8 per cent in 2018 and 6.6 per cent in 2017.²¹ Among 25-34 year-olds with a tertiary education, the unemployment rate was just 2.9 per cent in 2018.²² However, there are significant skills shortages and skills mismatches in the labour market. In 2017, 63 per cent of employers reported that finding staff with the right skills was a major obstacle.²³ Because of the Covid-19 pandemic, unemployment could rise to 5.8 per cent in 2020.²⁴

Poland attracts a large amount of foreign direct investment (FDI), seeing 373 new projects in 2019, a 14 per cent increase from the year before.²⁵ This was a total of US\$21.8 billion in capital investment, accounting for 10 per cent of the European market share. The major sectors for greenfield projects are construction, ICT and the automotive industry. Warsaw in particular is a hub for tech start-ups and is home to R&D centres for Amazon, Uber and Microsoft. Polish software developers regularly feature

¹⁵ [Poland: Country Profile](#), *Euromonitor International*, 8 June 2020.

¹⁶ [Poland](#), *The Observatory of Economic Complexity*, accessed 23 July 2020.

¹⁷ [BSS - Business Services Sector](#), *Polish Investment and Trade Agency*, accessed 13 July 2020.

¹⁸ [Black Clouds Over Polish Coal](#), *Politico*, 5 February 2020.

¹⁹ [Poland puts Polish coal first; halts imports: minister](#), *Reuters*, 4 February 2020.

²⁰ [Poland: Country Profile](#), *Euromonitor International*, 8 June 2020.

²¹ [Yearbook of Labour Statistics 2019](#), *Statistics Poland*, 4 March 2020;

²² [Education at a Glance: Poland](#), *OECD Indicators*, 2019.

²³ [OCED Skills Strategy Poland](#), *OECD*, 2019.

²⁴ [Poland: Country Profile](#), *Euromonitor International*, 8 June 2020.

²⁵ [The fDi Report 2020](#), *fDi Intelligence*, May 2020.

strongly in global rankings.²⁶ In a March 2020 ranking by the Financial Times, Warsaw ranked in the top ten cities by number of fastest-growing companies in Europe.²⁷

The friendly environment for foreign investment is reflected in Poland's ranking in the World Bank's Ease of Doing Business report 2020. It ranked 40th out of 190 countries, 25th among OECD high-income countries. While Poland's overall score increased from 2019, it fell from ranking 33rd in the previous year's report due to dramatic improvements in other countries' scores.²⁸ In the World Economic Forum's Global Competitiveness Report 2019, Poland came 37th out of 141 countries, level with the previous year.

Poland's future development strategy is called the Strategy for Responsible Development for the period through 2020. It was adopted in February 2017 and determines basic conditions, objectives and directions for Poland's development in social, economic, environmental and spatial terms. The key objective of the strategy is "to create conditions for increasing incomes of the Polish citizens along with increasing cohesion in the social, economic, environmental and territorial dimension".²⁹

The "re-industrialisation" push aims to create more competitive industry that encourages innovation and is driven by digitalisation, human capital development and research and development efforts. There are also efforts to encourage the growth of small and medium-sized enterprises and support the expansion of Polish enterprises abroad.³⁰

Inflation is expected to reach 4 per cent in 2020, up from 2.2 per cent in 2019.³¹ The currency of Poland is the zloty (PLN), which became a floating currency in April 2000. The exchange rate dropped from US\$1 = PLN3.15 in 2014 to US\$1 = PLN3.84 in 2019.³² Poland is preparing to adopt the euro, but there is no target date for this and the zloty is not yet within the exchange rate mechanism.³³

²⁶ [Warsaw tech start-ups eye broader horizons](#), *Financial Times*, 23 March 2020.

²⁷ [FT 1000: Europe's Fastest Growing Companies 2020](#), *Financial Times*, 2 March 2020.

²⁸ [Doing Business 2020](#), *World Bank*, 24 October 2019.

²⁹ [Strategy for Responsible Development for the period up to 2020 \(including the perspective up to 2030\)](#), *Government of Poland*, 2017.

³⁰ *Ibid.*

³¹ [Poland: Country Profile](#), *Euromonitor International*, 8 June 2020.

³² *Ibid.*

³³ [Poland and the euro](#), *European Commission*, accessed 13 July 2020.

5. POLITICS & POLICYMAKING

The Republic of Poland is a multiparty democracy with a two-chamber parliament. The country transitioned from communism in September 1989, with the formation of the Third Polish Republic. The first democratic government ushered in a flurry of reforms in politics and economics, kicking off ten years of democratic consolidation. Poland joined NATO in 1999 and the European Union in 2004.

Executive power is exercised by the president, who is the head of state and is elected by majority vote for five-year terms. The Council of Ministers is appointed by the president and led by the prime minister. It is responsible for internal and foreign policies and manages government administration.³⁴

In 2015, right-wing candidate Andrzej Duda was elected president by a 3 per cent margin and was narrowly re-elected for a second term in July 2020. The July 2020 runoff election may have drawn one of the highest presidential election turnouts in three decades at 68.2 per cent.³⁵ President Duda is a member of the Law and Justice Party, a conservative, Christian democratic populist party.

The parliament is called the National Assembly and has two chambers: the Sejm and the Senat. The Sejm is the lower chamber and has 460 members who are elected proportionally by each constituency. The 100 members of the Senat are elected for four-year terms in 100 single-member constituencies.³⁶ The next parliamentary elections will be held in 2023.

There is a three-tier division in public administration, divided into 16 voivodships (regions/provinces), 214 powiats, or districts, and 66 cities with powiat status, and 2,477 gminas (localities).³⁷

Poland's future development strategy is called the "Strategy for Responsible Development for the period up to 2020 (including the perspective up to 2030)" or the SRD. It was adopted on 14 February 2017 and sets out over 700 actions to increase the income of Polish citizens and strengthen social, economic, environmental and territorial cohesion.³⁸ The SRD sets out to "rebuild the economic model so that it serves the whole society," and develop greater engagement between state institutions, businesses and entrepreneurs.³⁹

In his 2020 election campaign, President Duda and his party laid out an agenda to continue two flagship infrastructure projects (a mega airport in central Poland and digging a canal through a Vistula Split) and continued judicial reform that has placed the country at odds with the European Union.⁴⁰

³⁴ [Poland: Main Executive and Legislative Bodies](#), *Eurydice*, 19 December 2020.

³⁵ [Poland's Duda narrowly beats Trzaskowski in presidential vote](#), *BBC*, 13 July 2020.

³⁶ [The political system](#), *Polish Investment and Trade Agency*, accessed 13 July 2020.

³⁷ [Administrative division of Poland](#), *Statistics Poland*, accessed 13 July 2020.

³⁸ [The 2030 Sustainable Development Agenda](#), *OECD*, 28 November 2017.

³⁹ [The Strategy for Responsible Development](#), *Government of Poland*, 2017.

⁴⁰ [4 takeaways from Duda's reelection as Poland's president](#), *Politico Europe*, 13 July 2020.

EDUCATION

The Polish education system has undergone comprehensive reform since 1999 and is considered a success story of dramatic educational change. Poland ranked below the OECD average in the PISA examinations in 2000, but in 2018, it ranked in the top five for all three subjects. The World Bank attributes Poland's ability to avoid increasing inequality as the economy has grown to the country's improved access to education across income groups and regions.⁴¹ In the early 1990s, more than 60 per cent of adults living in rural areas in Poland had only a primary school education; now enrolment in upper secondary education is nearly universal.⁴² The adult literacy rate is 99.8 per cent.⁴³

Pre-tertiary education

Poland's pre-tertiary education system is managed by the Ministry of Education. Education is compulsory for a total of nine years, from the final year of preschool and through the eight years of primary school. After the end of primary school at age 15, pupils are obligated to continue their education part-time in either schools (i.e., upper secondary school) or in non-school settings, such as vocational training offered by an employer.⁴⁴

All three to six-year olds are entitled to pre-primary schooling in his or her locality. Preschool is optional between ages three and five but becomes mandatory from age six. In 2018, 89.6 per cent of children aged three to six participated in preschool education.⁴⁵

Following preschool, students enter an eight-year primary school that includes early school education (grades one through three) and teaching by subject (grades four through eight). Primary school culminates in a compulsory exam that influences entry into secondary school. In 2018/19, the gross enrolment rate (GER) in primary schools was 95.5 per cent.⁴⁶

Poland's pre-tertiary education system is undergoing a new round of reform that will be completed by 2023/24. These reforms have phased out the three-year lower secondary school, or *gimnazjum*, which ceased operation in 2019. Previously, following *gimnazjum*, students could continue on to three types of upper secondary schools: a three-year general upper secondary school; a four-year technical upper secondary school; or a three-year basic vocational school. The three-year vocational school has already been replaced by a "Stage I" sectoral vocational school, while the other programmes under this system will operate one final three-year cycle before being phased out in 2022.⁴⁷

The new structure folds lower secondary school into the eight-year primary school and introduces a compulsory exit exam to determine secondary school options. Secondary school pathways are one of the following: four-year general secondary school, five-year technical secondary school, Stage I three-year sectoral vocational school, or Stage II two-year sectoral vocational school.⁴⁸

The reform programmes since the 1990s have dramatically improved the performance of the Polish education system. In the PISA 2018 assessment, Polish students scored above the OECD average in reading, mathematics, and science. While the performance across all subjects have varied over the

⁴¹ [Lessons from Poland. Insights for Poland: A Sustainable and Inclusive Transition to High Income Status](#), World Bank, 2017.

⁴² [Poland Overview](#), Center on International Education and the Economy, accessed 7 July 2020.

⁴³ [Poland: Country Profile](#), Euromonitor International, 8 June 2020.

⁴⁴ [Organisation of the Education System and of its Structure](#), European Commission Eurydice, 20 December 2019.

⁴⁵ [Education in the 2018/19 School Year](#), Statistics Poland, 12 February 2020.

⁴⁶ [Organisation of the Education System and of its Structure](#), European Commission Eurydice, 20 December 2019; [Education in the 2018/19 School Year](#), Statistics Poland, 12 February 2020.

⁴⁷ [Organisation of the Education System and of its Structure](#), European Commission Eurydice, 20 December 2019.

⁴⁸ [Poland Overview](#), Center on International Education and the Economy, accessed 7 July 2020; [Organisation of the Education System and of its Structure](#), European Commission Eurydice, 20 December 2019.

years, the overall trend is positive, with PISA 2018 scores higher than PISA 2006 scores.⁴⁹ In PISA 2018, Poland ranked third best in Europe in maths and science and fourth best in reading comprehension.

English is a popular language for study in Polish pre-tertiary schools and in 2018/19, 96 per cent of all primary, lower secondary, upper secondary and post-primary school students were studying English.⁵⁰ Poland ranked 11th on the Education First English Proficiency Index 2019 overall, ninth among European countries.⁵¹ The next most popular language is German.

At the end of secondary school, students sit the matriculation exam in order to apply for higher education studies at Polish universities. All students must take three basic exams: Polish language and European literature; a modern language (French, Italian, English, Russian, German or Spanish); and mathematics. In addition, students can select up to six “extended level” exams from the following subjects: History, biology, chemistry, physics and astronomy, knowledge of dance, geography, history of art, modern language, history of music, information technology, Latin and ancient history, philosophy, languages of ethnic groups in Poland (Belarusian, Lithuanian, Ukrainian and the Kashubian language). In order to pass the exam, candidates must score at least 30 per cent in the three compulsory exams.⁵²

Poland has a strong history of TVET provision. Because of this, there is near-universal enrolment in secondary education programmes, and 62 per cent of 25-66-year-olds have upper secondary or post-secondary non-tertiary education as their highest level of attainment. This proportion is the third highest among OECD countries. In 2017, 45 per cent of upper secondary graduates obtained a vocational qualification, compared with an OECD average of 40 per cent.⁵³ Graduates from upper secondary vocational programmes tend to be older than in other OECD countries with an average age of 22.3 in Poland, compared with 19.8 in the OECD.⁵⁴

In 2018, the Polish government introduced new reforms to the TVET system to better align programme offerings to the economy and strengthen employer involvement in designing curriculum and developing work-based learning opportunities.⁵⁵ Because of the strong TVET provision at the upper secondary level, there is near universal enrolment (93 per cent) of 15-19 year-olds in education in Poland.⁵⁶ In 2018, only 4.8 per cent of 18-24-year-olds were considered to be early leavers from education and training, an improvement from 5.3 per cent in 2009. This was significantly lower than the 10.6 per cent EU average.⁵⁷

The new core curriculum strengthens practical elements in TVET programmes and encourages local governments to set up and run vocational schools and institutions targeted to specific progressions. As of September 2019, the TVET sector includes new centres in non-school forms, based on the existing “practical training centres”.⁵⁸

⁴⁹ [Country note: Poland](#), PISA 2018, OECD, December 2019.

⁵⁰ [Education in the 2018/19 School Year](#), Statistics Poland, 12 February 2020.

⁵¹ [Poland](#), Education First English Proficiency Index, 2019.

⁵² [Matura Exam in Poland](#), Poland Education Info, accessed 9 July 2020.

⁵³ [Education at a Glance: Poland](#), OECD Indicators, 2019.

⁵⁴ Ibid.

⁵⁵ [Poland Overview](#), Center on International Education Benchmarking, accessed June 2020.

⁵⁶ [Education at a Glance: Poland](#), OECD Indicators, 2019.

⁵⁷ [Education and Training Monitor 2019: Poland](#), European Commission, September 2019.

⁵⁸ Ibid.

Higher education

Tertiary education is managed by the Ministry of Higher Education and Science. Similar to the pre-tertiary sector, higher education in Poland has undergone dramatic reform since the 1990s, resulting in a greatly improved sector. In 1990, the Higher Education for Everyone law successfully increased the availability of HE with the opening of the sector to private HEIs, resulting in an increase from 112 HEIs in 1990 to 247 in 2004.⁵⁹ In 2018/19 there were 392 total HEIs, including 230 private HEIs and 19 universities.⁶⁰

In 2005, Poland implemented another law regarding quality and compliance in education, which helped the system to be compliant with EU students and introduced the three-stage education system (bachelor's/master's/doctoral). The 2018 law for excellence in research and internationalisation marked the beginning of evaluating HEIs based on the number of papers published in international scientific journals; introduced two categories of HEIs (academic and professional) with different financial schemes; provided scholarships for PhD students, and established the National Agency for Academic Exchange (NAWA).⁶¹

The reforms vastly improved accessibility of tertiary education. In 2018, many more adults in Poland had attained a tertiary degree than a decade ago: in 2008, 32 per cent of adults aged 23-34 had attained a tertiary degree. In 2018, the proportion rose to 43.5 per cent, slightly less than one per cent lower than the OECD average (44.3 per cent).⁶² Seven out of ten adults with a tertiary education have a master's degree in Poland, much higher than the OECD average of three out of 10.

Students must take the matura exam for admission into tertiary study. Higher education in Poland is divided into "cycles." First-cycle programmes are undergraduate programmes that lead to a bachelor's degree, second-cycle programmes correspond to master's degrees and third-cycle programmes lead to doctoral degrees. Long-cycle programmes are post-secondary programmes that lead to a master's degree.⁶³

Full-time studies at public higher education institutions are free of charge for Polish students, though many universities charge an administration fee. Private tuition can cost between EUR2,000 and 6,000 per year. In 2017, nearly three-quarters of tertiary students were enrolled in public institutions.⁶⁴

While access has improved, the number of students enrolled in higher education has decreased by 36 per cent over the last decade, reflecting demographic trends. The proportion of graduates in science, technology, mathematics, and engineering (STEM) fields was 22.9 per cent in 2018, and the proportion of total graduates in natural sciences, mathematics and statistics was just 3.6 per cent, one of the lowest in the EU.⁶⁵

In 2018/19, there were 1.2 million students in HEIs in Poland, a 4.8 per cent decline from the previous year. Women accounted for 58 per cent of all students, and nearly three quarters of tertiary students (73.3 per cent) were enrolled in public schools. The most popular subject areas were business and administration (18 per cent of students), health (11 per cent), behavioural sciences (10 per cent), and engineering and engineering trades (10 per cent).⁶⁶ There were 161,200 postgraduate students in 2018/19, a 1 per cent increase from the previous year, of whom 72 per cent were female. There were 39,300 doctoral students, a 5 per cent decline from the year before.⁶⁷

⁵⁹ [The Shape of Global Higher Education in Europe](#), British Council, May 2019.

⁶⁰ [Higher education institutions and their finances in 2018](#), Statistics Poland, 31 October 2019.

⁶¹ [The Shape of Global Higher Education in Europe](#), British Council, May 2019.

⁶² [Education at a Glance: Poland](#), OECD Indicators, 2019.

⁶³ [Organisation of the Education System and of its Structure](#), European Commission Eurydice, 20 December 2019.

⁶⁴ [Education at a Glance: Poland](#), OECD Indicators, 2019.

⁶⁵ [Education and Training Monitor 2019: Poland](#), European Commission, September 2019.

⁶⁶ [Higher education institutions and their finances in 2018](#), Statistics Poland, 31 October 2019.

⁶⁷ Ibid.

According to the Times Higher Education World University Rankings, the best universities in Poland are Jagiellonian University and the University of Warsaw, both of which rank in the 601-800 bracket in the world rankings. Adam Mickiewicz University, Poznan and Gdansk University of Technology rank in the 801-1,000 bracket.⁶⁸

Poland has room to improve its public research and development sector. Poland scored below most other new high-income countries on innovation in the Global Competitive Index.⁶⁹ In the 2019 Nature Index, Poland ranked 24th in research output globally and most output was in the physical sciences and chemistry. Poland's top collaboration partner in 2019 was the US, followed by Germany, the UK, and France.⁷⁰ Further developing public R&D will be crucial to boosting Poland's innovation capabilities. In December 2019, the Polish government announced that 10 universities would receive a 10 per cent funding boost between 2020 and 2026 under a plan for developing research excellence.⁷¹

Key policies related to education

As mentioned, the Polish pre-tertiary education system is in the process of structural reform that is expected to be fully implemented by 2023/24. The reform also includes a new national core curriculum at the primary and secondary levels that reduces focus on the sciences and adds more curriculum time to history and patriotic education.⁷² The reforms, which in 2017 abolished the gimnazia (lower secondary) schools introduced in the 1999 reforms, are quite controversial and many education-focussed non-governmental organisations and teachers' unions protested the changes. According to the Polish Teachers Association (ZNP), the largest trade union, the reforms have created chaos and challenges for school principals, local governments, students and teachers.⁷³ The impact of the reforms on the quality of teaching will be difficult to discern in the near term due to the Covid-19 crisis.

As of 2019, education expenditure has increased by more than 136 per cent in the last 15 years.⁷⁴ In 2018, education expenditure from the state and local government budgets was an equivalent of 3.7 per cent of GDP.⁷⁵ This is lower than the average of 4.6 per cent among EU countries.⁷⁶

Poland's Strategy for Responsible Development incorporates internationalisation of higher education. The strategy aims to encourage internationalisation, innovativeness and commercialisation of research findings, facilitate the employment of international scholars at Polish HEIs, and encourage non-EU students to study in Poland.⁷⁷ The strategy also emphasises the importance of lifelong learning and allows for changes to the education system, in particular for TVET and higher education, to respond to the needs of the modern economy.⁷⁸

The Foundation for the Development of the Education System (FRSE) manages programmes, projects and initiatives aimed at broadening basic and specialist knowledge and acquisition of new skills and competencies in formal and informal education settings.⁷⁹ It is particularly involved in managing EU education programmes in Poland and international mobility programmes.

⁶⁸ [Best universities in Poland 2020](#), *Times Higher Education World University Rankings*, 30 September 2019.

⁶⁹ [Lessons from Poland. Insights for Poland: A Sustainable and Inclusive Transition to High Income Status](#), *World Bank*, 2017.

⁷⁰ [Poland](#), *Nature Index*, May 2020. The Nature Index tracks annual research output in the natural sciences.

⁷¹ [Polish Plan for Research Excellence](#), *Inside Higher Ed*, 5 December 2019.

⁷² [Poland Overview](#), *Center on International Education Benchmarking*, accessed June 2020.

⁷³ [Poland: Government enacts radical education reform despite opposition](#), *European Foundation for the Improvement of Living and Working Conditions*, 23 March 2017.

⁷⁴ [Raport GUS: w ciągu 15 lat wydatki na oświatę wzrosły o ponad 136 procent](#), *Portal Samorządowy*, 4 November 2019.

⁷⁵ [Education in the 2018/19 School Year](#), *Statistics Poland*, 12 February 2020.

⁷⁶ [Education and Training Monitor 2019: Poland](#), *European Commission*, September 2019.

⁷⁷ [Poland: Mobility and Internationalisation](#), *Eurydice*, 30 December 2019.

⁷⁸ [OECD Skills Strategy Poland](#), *OECD*, 2019.

⁷⁹ [About](#), *Foundation for the Development of the Education System*, accessed 10 July 2020.

The government adopted the ‘Integrated Skills Strategy 2030’ in January 2019 in cooperation with the OECD and Erasmus+. The project aims to increase adult participation in learning, reduce skills mismatch in the labour market, strengthen the use of skills in the labour market and workplace, and strengthen the coordination and skills management structures.⁸⁰

International student recruitment

Overall inbound trend

Poland is considered to have a very open and supportive policy environment for international engagement and published an international education strategy in 2015. In October 2017, the government established the National Polish Agency for Academic Exchange (NAWA), which was tasked with coordinating the drive to internationalise Poland’s academic and research institutions.

Poland aims to attract 100,000 international students by 2020 as part of the “Ready, Study, Go! Poland” campaign, first launched in 2012.⁸¹ NAWA took the helm of this campaign in 2017 and Poland received 78,300 international students in 2018/19, an increase of about 560 per cent compared to 12 years before and a year-on-year increase of 7.6 per cent.⁸²

In 2018/19, 61,000 inbound students (78 per cent of the total) were from Europe and 39,200 students were from Ukraine.⁸³ According to UNESCO, about 35,000 inbound students are from Ukraine, making it the most popular sending country. Following Ukraine is Belarus (5,000) and India (2,100). Norway, Sweden, Turkey, Spain, Czechia, Germany and Russia all sent more than 1,000 students in 2017.⁸⁴

Poland is seen as an attractive destination due to its location at the crossroads of eastern and central Europe, competitive living and study costs, and strong higher education institutions. Many of the country’s HEIs offer degree programmes in English.⁸⁵ Many programmes are free of tuition for EU citizens, but private universities charge tuition between EUR2,000-6,000 per year. The Polish government offers scholarships for international students, as do many institutions.⁸⁶

Overall outbound trend

According to UNESCO data, there were 24,918 internationally mobile Polish tertiary students in 2017. The UK is the most popular destination for tertiary-level Polish students (6,565 by 2017 UNESCO data), followed by Germany (4,710). France, Denmark, the US, Italy and the Netherlands all hosted more than 1,000 Polish students in 2017, but significantly trailed Germany and the UK.

The number of Polish students opting to study abroad has been rising gradually since 2013 but remains considerably lower than the peak of 28,500 outbound students in 2009. Outbound students rose from 23,287 to 24,918 between 2013 and 2017.⁸⁷

The country also has bilateral exchange agreements with 21 countries to facilitate academic exchange programmes lasting from five days to 12 months.⁸⁸ Polish students are eligible for Erasmus programmes, which makes studying elsewhere in Europe very attractive. The Polish government also

⁸⁰ [Education and Training Monitor 2019: Poland](#), European Commission, September 2019.

⁸¹ [The Shape of Global Higher Education in Europe](#), British Council, May 2019.

⁸² [The Shape of Global Higher Education in Europe](#), British Council, May 2019; [Study in Poland](#), Prospects, May 2020; [Ready, Study, Go! Poland campaign](#), Polish National Agency for Academic Exchange, accessed June 2020; [Higher education institutions and their finances in 2018](#), Statistics Poland, 31 October 2019.

⁸³ [Higher education institutions and their finances in 2018](#), Statistics Poland, 31 October 2019.

⁸⁴ [Global Flow of Tertiary-Level Students](#), UNESCO UIS, accessed July 2020.

⁸⁵ [Study in Poland](#), Prospects, May 2020.

⁸⁶ [Study in Poland](#), Prospects, May 2020.

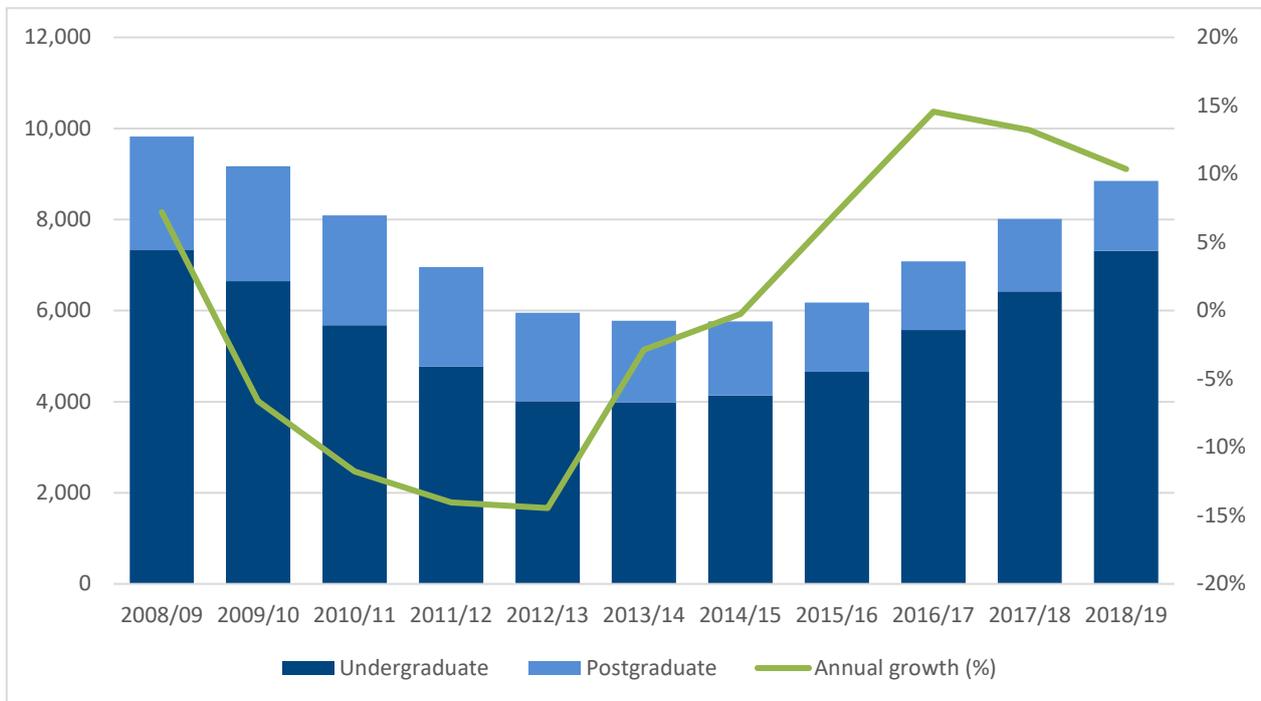
⁸⁷ [UIS](#), UNESCO, accessed 10 August 2020

⁸⁸ [Exchange programme for students and scientists as part of bilateral cooperation](#), Polish National Agency for Academic Exchange, accessed June 2020.

offers scholarships and grants for Polish students going abroad, such as the Ministry of Higher Education and Science’s “The Best of the Best” project (co-funded by the European Social Fund).⁸⁹

UK recruitment

Figure 4: Polish students in UK HEIs, undergraduate and postgraduate split

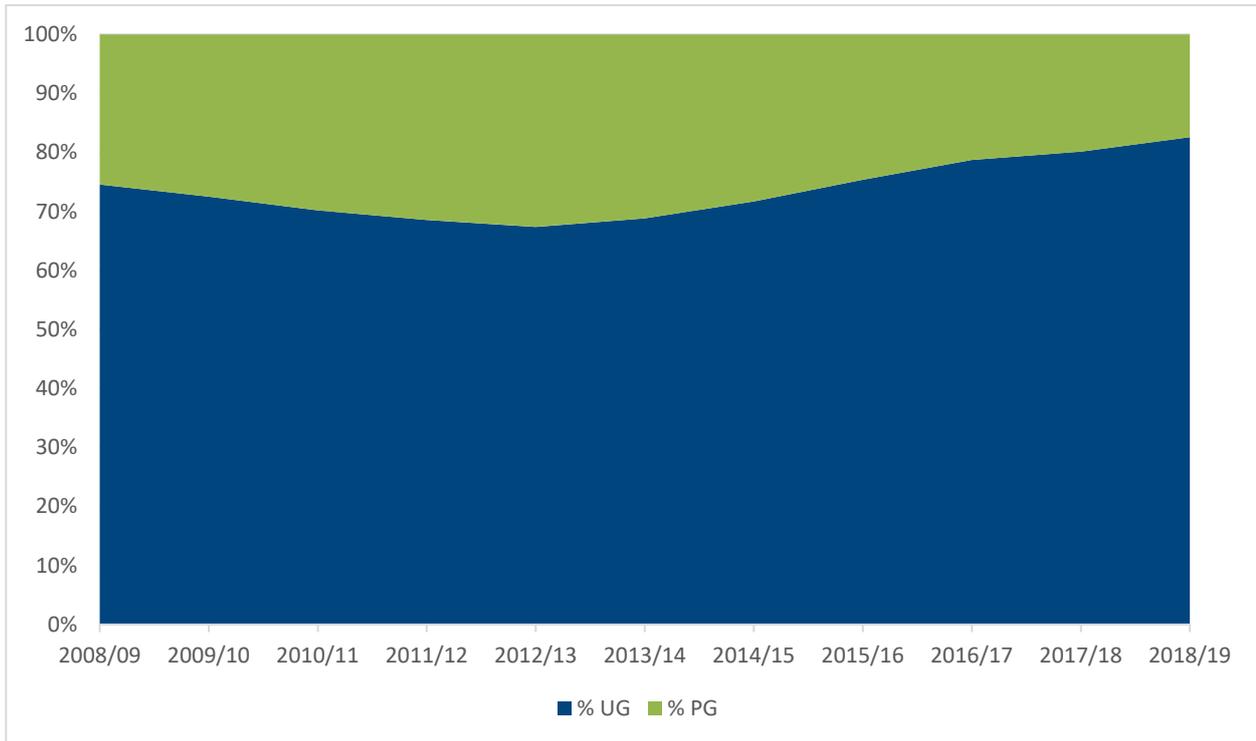


Source: HESA

The UK is by far the most popular destination for internationally mobile Polish students at the tertiary level. In 2018/19, there were 8,845 Polish students at UK HEIs, a 10 per cent increase year-on-year and the fourth consecutive year of growth. While the number of Polish students has not recovered to the peak of just under 10,000 students in 2008/09, it has bounced back since reaching a low of 5,765 in 2014/15.

⁸⁹ [Poland: Mobility in Higher Education](#), Eurydice, 30 December 2019.

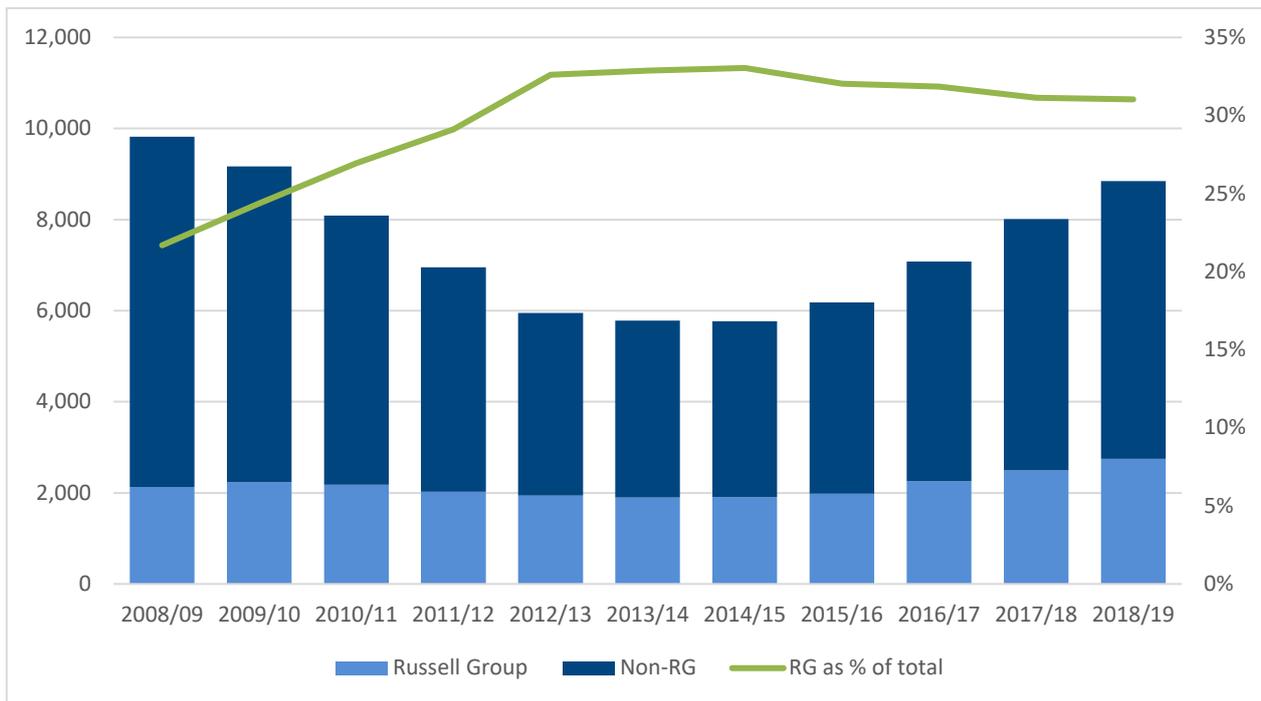
Figure 5: Polish students in UK HEIs, level of study



Source: HESA

As seen in Figure 5, the vast majority of Polish students in the UK are undergraduates and this proportion has increased over the last decade. In 2010/11, undergraduates accounted for 75.6 per cent of the total, rising to 82.6 per cent in 2018/19. The number of undergraduates has very nearly recovered to 2008/09 levels (7,310 in 2018/19 compared to 7,325 in 2008/09). Overall interest in UK postgraduate programmes has waned since reaching a peak of 2,520 in 2009/10, with just 1,540 postgraduate students in 2018/19.

Figure 6: Russell Group enrolments



Source: HESA

Polish enrolments in Russell Group institutions as a proportion of the whole reached a peak in 2014/15, accounting for 33 per cent of all enrolments, and have fallen slightly each year since, accounting for 31 per cent in 2018/19. Though Polish enrolments in UK HEIs overall dropped significantly between 2008/09 and 2014/15, enrolments in Russell Group institutions remained roughly the same during this period, indicating the staying power of these institutes.

Subject areas

Figure 7: New UK enrolments according to subject area, YoY change

	Total new UK enrolments in 2018/19	Undergraduate			Postgraduate		
		New UK enrolments in 2018/19	Change from previous year	5-year trend	New UK enrolments in 2018/19	Change from previous year	5-year trend
Business & administrative studies	1770	1530	13.3%		240	-2.0%	
Creative arts & design	960	840	18.3%		120	9.1%	
Biological sciences	850	705	14.6%		145	-3.3%	
Computer science	770	680	25.9%		90	5.9%	
Social studies	730	610	16.2%		120	-4.0%	
Engineering & technology	650	485	9.0%		165	-17.5%	
Languages	510	430	2.4%		80	0.0%	
Physical sciences	445	320	18.5%		125	0.0%	
Law	395	345	4.5%		50	-23.1%	
Subjects allied to medicine	355	270	5.9%		85	0.0%	
Mass communications and documentation	355	320	12.3%		35	16.7%	
Architecture, building & planning	290	235	6.8%		55	22.2%	
Historical and philosophical studies	200	145	20.8%		55	-15.4%	
Medicine & dentistry	190	140	40.0%		50	11.1%	
Mathematical sciences	180	130	13.0%		50	-28.6%	
Education	95	45	-10.0%		50	-9.1%	
Combined	60	55	0.0%		5	0.0%	
Agriculture & related subjects	35	25	25.0%		10	0.0%	
Veterinary science	15	5	0.0%		10	0.0%	

Source: HESA

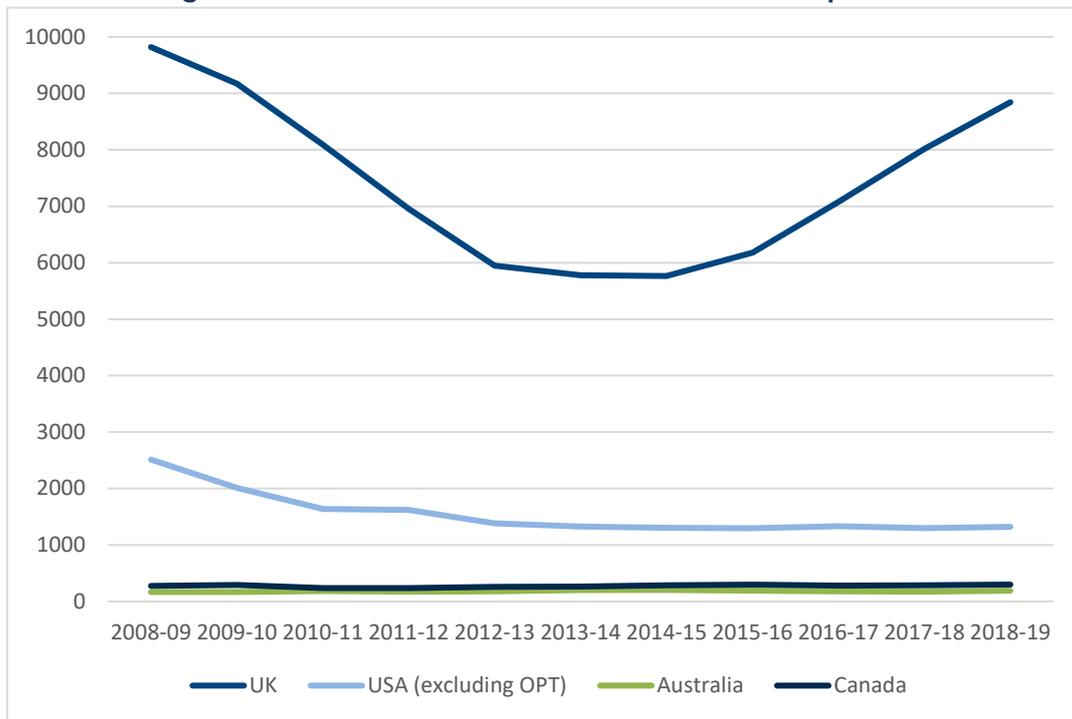
Business and administrative studies is by far the most popular subject area for both undergraduates and postgraduates. In 2018/19, new undergraduate enrolments in this subject area were nearly double those of the next most popular subject area, creative arts and design.

Due to the consistent increases in new undergraduate enrolments, all subject areas except education have seen positive enrolment trends. In 2018/19, the subject areas that saw the highest growth rates were medicine and dentistry (40 per cent), computer science (26 per cent), historical and philosophical studies (21 per cent), physical sciences (18.5 per cent) and creative arts and design (18 per cent).

New postgraduate enrolments have not seen the same growth as undergraduate enrolments, falling slightly in 2018/19, and many subject areas are waning in popularity. However, architecture, building and planning has experienced growth for five consecutive years and new enrolments grew by 22 per cent in 2018/19, though there were still only 55 new enrolments. Computer science grew by 6 per cent, a sixth consecutive year of growth, with 90 enrolments. Despite new enrolments decreasing by 17.5 per cent in 2018/19, engineering and technology was still the second most popular subject area for postgraduates with 165 enrolments, behind business and administrative studies which had 240 new enrolments.

Competitor activity

Figure 8: Poland HE enrolments in the UK and competitors



Source: HESA, IIE, AusTrade, StatCan (to 2016-17); British Council estimate based on data from StatCan and Immigration, Refugees & Citizenship Canada (2017-18)

United States

The United States has waned in popularity in the last decade, declining from 2,513 Polish tertiary-level students in 2008/09 to 1,323 inbound Polish students in 2018/19. This number has remained stagnant since 2012/13.

Canada

Canada does not capture a significant portion of the Polish market, with just 299 Polish students in 2018/19. Despite Canadian efforts to attract more international students from around the world, this initiative does not appear to have reached the Polish market.

Australia

Similar to Canada, Australia does not capture a large portion of outbound Polish students with just 193 Polish tertiary students in 2018. This number has increased slightly in the last decade, up from the 167 enrolments in 2008, but not significantly.

Transnational education

While the EU is the host of the second-highest number of students on UK TNE programmes, Poland is not a major contributor and did not make it into the top 10 in 2017/18.⁹⁰ According to the latest HESA data, there were a total of 1,605 Polish students on UK TNE programmes in 2018/19, 1,010 of whom were registered at Oxford Brookes University, 60 of whom were registered on University of London programmes and 35 of whom were registered at the Open University.⁹¹

In 2018, Coventry University announced plans to become the first foreign university to launch an independent campus in Poland. The university already collaborates with the Wrocław University of Science and Technology (WUST) for a master's degree programme that allows students to study in Poland and Coventry.⁹² Coventry's Polish campus is set to welcome its first intake in September 2020, depending on Covid-19 restrictions.⁹³

⁹⁰ [The Scale of UK HE TNE 2017/18](#), *Universities UK International*, September 2019. UUKi rankings of host countries excludes the three major UK TNE providers of Oxford Brookes University, the Open University, and the University of London because any small variations in one of these three can impact the understanding of the more general spread of UK TNE programmes.

⁹¹ HESA data 2018/19, *HESA*, 2020.

⁹² [Coventry University to open first British campus in Poland](#), *Coventry University*, 30 July 2018.

⁹³ [Coventry University's Polish campus will be ready for September](#), *Coventry University*, 27 May 2020.