



SERVICES FOR
INTERNATIONAL
EDUCATION
MARKETING

POLAND – MARKET OPPORTUNITIES FOR HE AND ELT SECTORS AND BOARDING SCHOOLS

JUNE 2013

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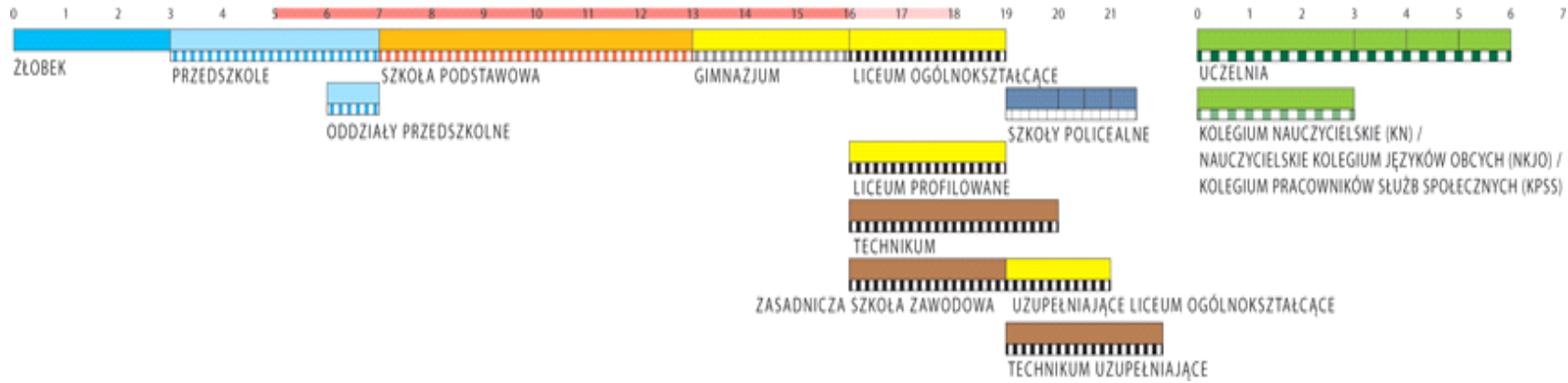
Content

- Polish education system – where to look for your students?
- Some facts and figures about Poland and its education system
- Students mobility – UK favoured destination
- Demographics – impact on schools and FE and HE institutions
- What motivates Polish students to study in the UK?
- Interest in boarding schools
- ELT market in Poland
- How to promote your offer?
- How can British Council in Poland help you?

Education system – where to look for your students?

International Standard Classification of Education

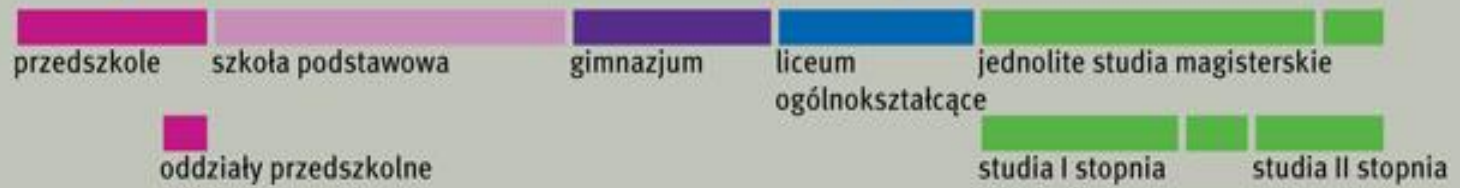
Structure of the national education system 2012/13



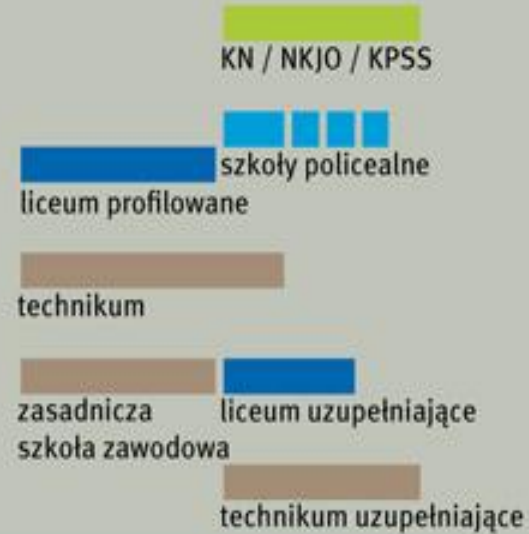
- Early childhood education and care (for which the Ministry of Education is not responsible)
 - Early childhood education and care (for which the Ministry of Education is responsible)
 - Primary education
 - Single structure
 - Secondary general education
 - Secondary vocational education
 - Post-secondary non-tertiary education
 - Tertiary education (full-time)
- Allocation to the ISCED levels: ▨▨▨ ISCED 0 ▨▨▨ ISCED 1 ▨▨▨▨ ISCED 2 ▨▨▨▨ ISCED 3 ▨▨▨▨▨ ISCED 4 ▨▨▨▨▨ ISCED 5A ▨▨▨▨▨▨ ISCED 5B
- ▨ Compulsory full-time education
 - ▨ Compulsory part-time education
 - Additional year
 - >> Study abroad
 - n/- Combined school and workplace courses
 - n/- Compulsory work experience + its duration

Education system – where to look for your students ?

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27



- Pre-primary – ISCED 0
- Primary – ISCED 1
- Lower secondary general – ISCED 2
- Upper secondary general – ISCED 3
- Upper secondary vocational – ISCED 3
- Post-secondary non-tertiary – ISCED 4
- Tertiary education – ISCED 5A
- Tertiary education – ISCED 5B
- Compulsory full-time education
- Compulsory part-time education



Education system - some facts and figures

Academic year

- Schools 1 September - end of June
- Universities 1 October - end of June
- Language schools follow school year

Higher Education institutions

Public 131

Non-public 325

Fees

Public institutions free for Polish citizens; for international students - about EUR 2000 per year

Non-public institutions - from EUR 2000 to 6000 (medical and MBA from EUR 8000 to 12000)

Both sectors charge fees for the courses delivered in foreign languages (both domestic and international students)

Facts and figures

- Positive GDP growth rate but slowing down

2011- 4,5

2012- 2,0

2013 - 1,1

2014 predicted 2.2

A large internal market, European Union cohesion policy funding and growing Foreign Direct Investments

- Inflation rate (annual) 3.7 (UK 2.8)
- Unemployment general – 13.4 in 2012
- Youth unemployment – 27.5 (UK 20; Germany 7.9; Austria 8)
- Public expenditure on education – 5,1 % of GDP in nominal value
- School drop-out rate 5%
- Students planning to study in HE institutions 86%
- Students selecting English as a foreign language at school 96%

Students mobility – UK favoured destination

Erasmus mobility exchanges (HESA data)

First edition (1987) of the programme – 1436

2010/11 edition – 14234

UG and PG students

Currently about 18 000 (8500 through UCAS from Poland; the rest - students residing in the UK)

What motivates them?

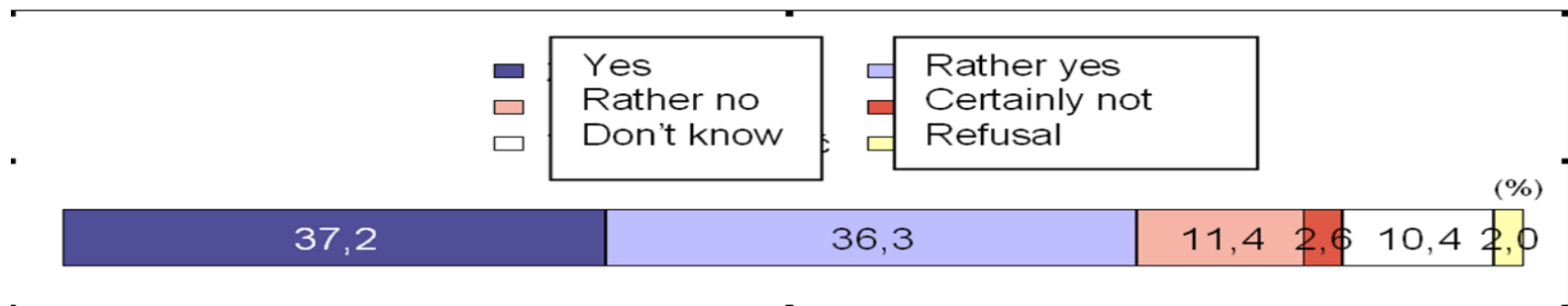
- Quality
- Career prospects
- The value of UK diploma on the labour market
- Cultural experience
- Close destination and cheap travel

What motivates Polish students to study in the UK?

British universities highest in students' ranking in Polish Open University Survey (2011):

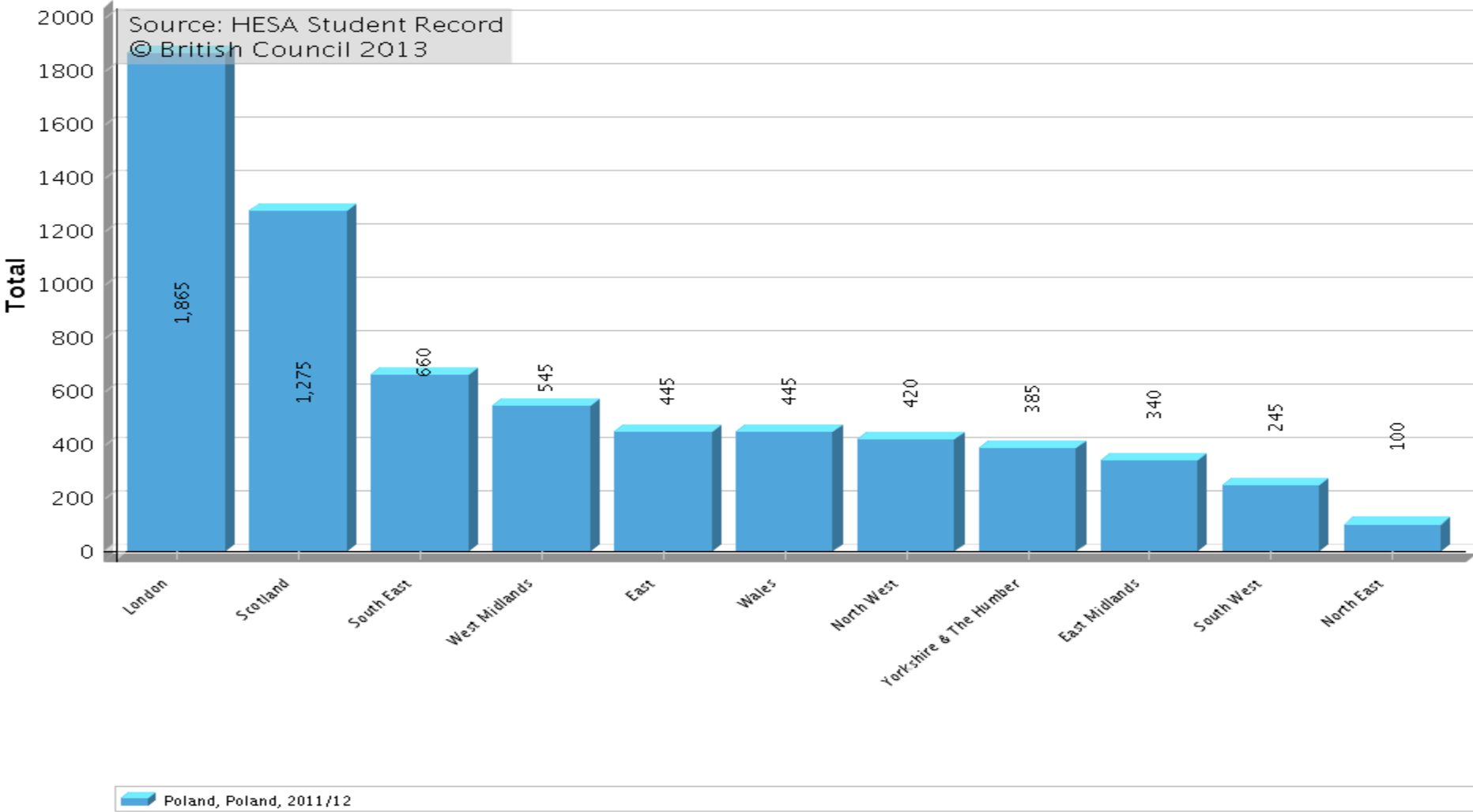
- The best prospects for employment (over 51 %)
- MA from UK university is highly regarded by Polish employers and is an advantage in job application according to 77%

Will studying in the UK enhance your career prospects in Poland?
CBOS Survey 2012



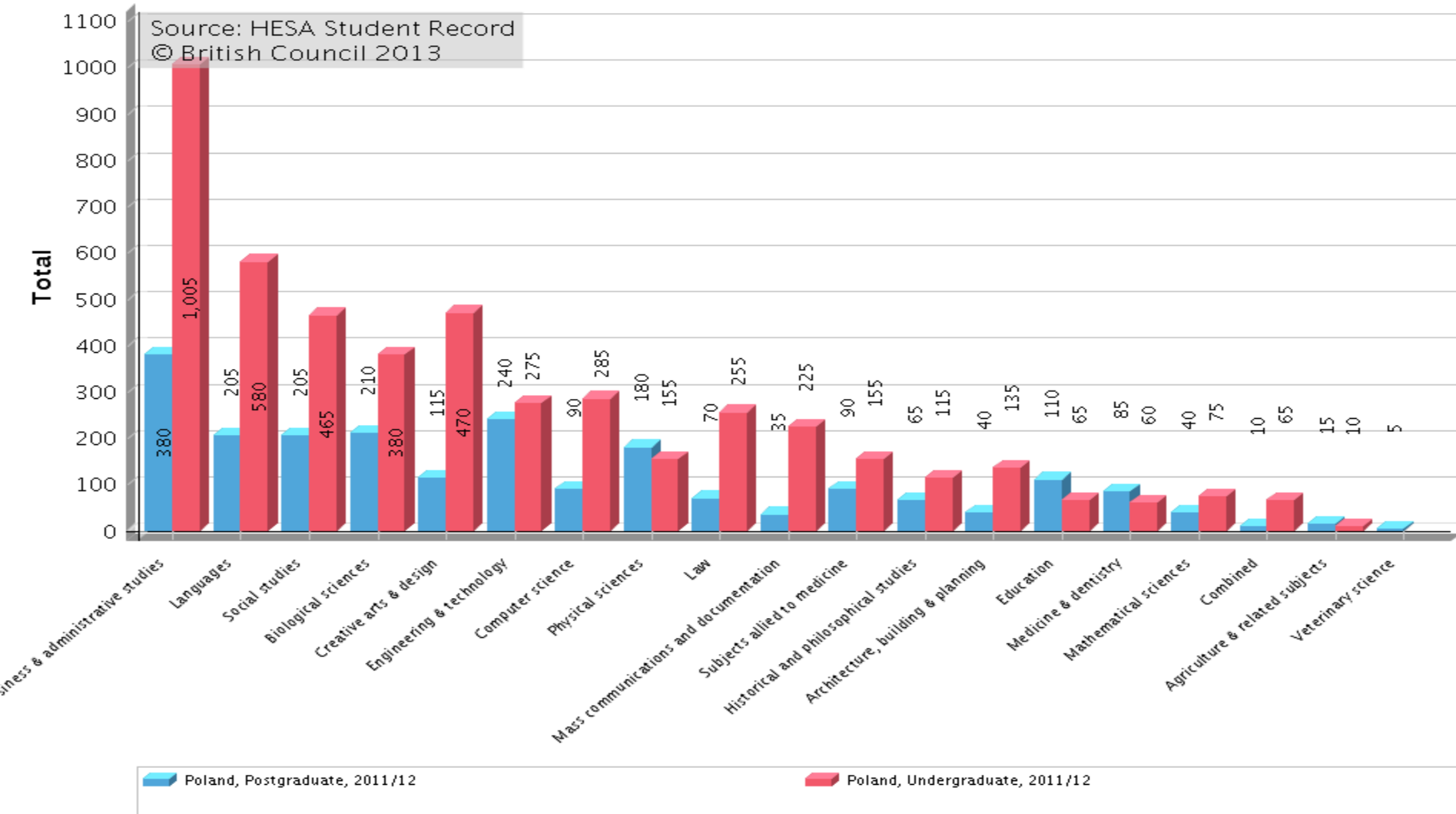
Regional distribution of Polish students in the UK

Region of institution, Nationality, Country of Domicile



Most popular subjects and levels of studies

Subject area, Country of Domicile, PG / UG Marker



CBOS Report 2012 commissioned by British Council

Respondents – students 15-25 years old

1 out of 10 plans studying in the UK

58,1% second cycle

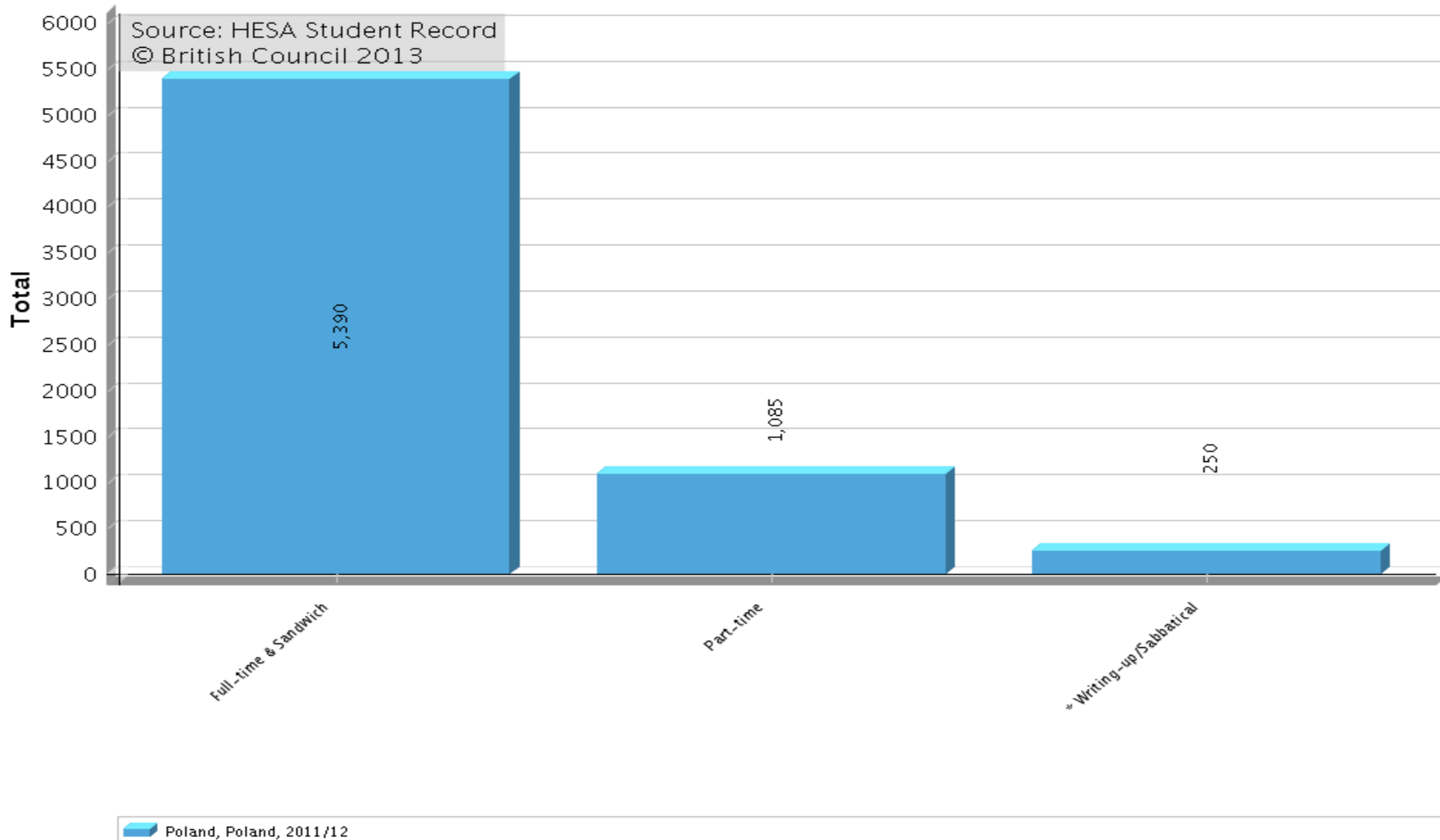
16,1 % first cycle

10,3 % postgraduate studies

3,7 % FE College

Mode of study

Mode of study, Nationality, Country of Domicile

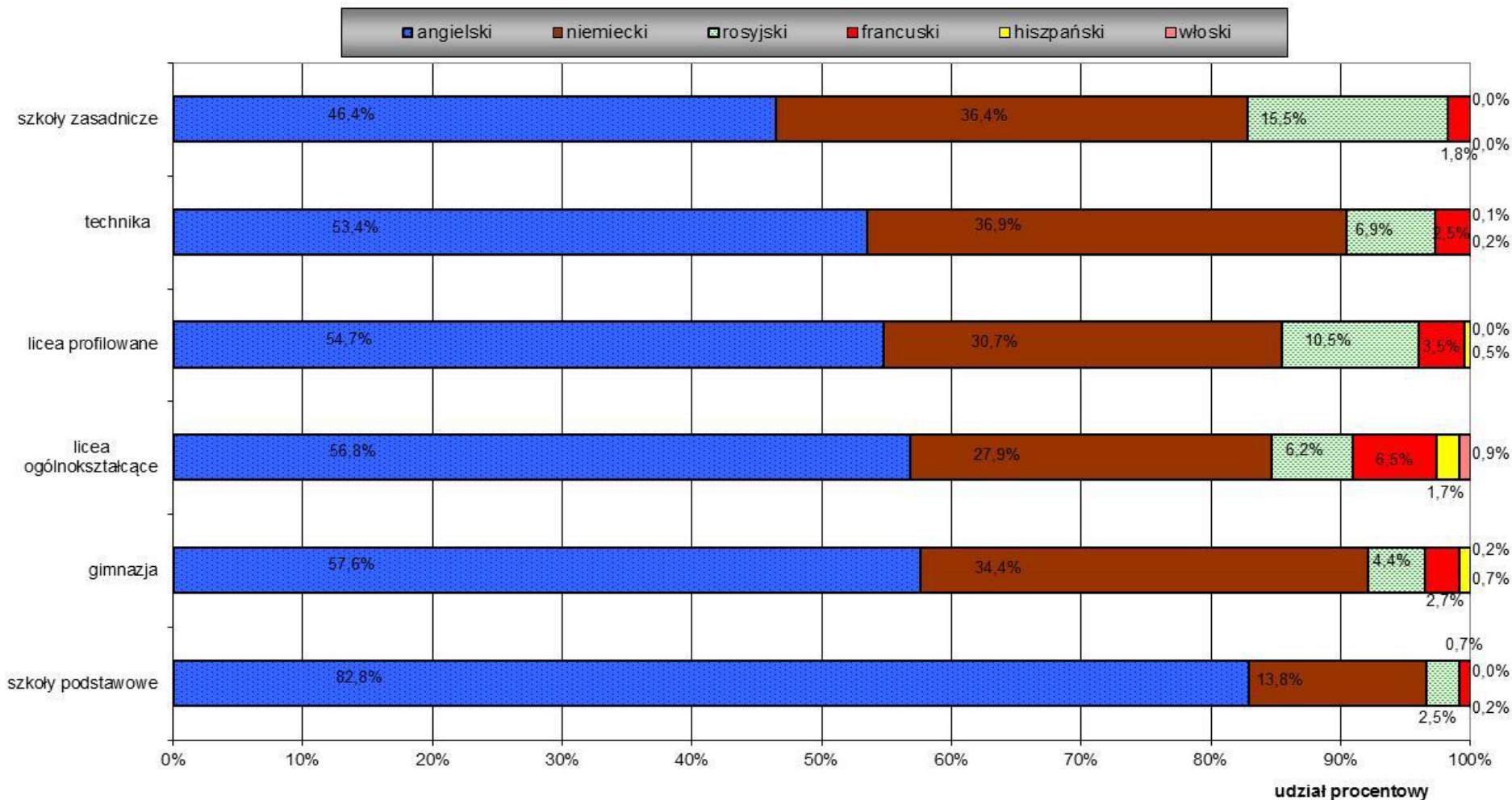


Interest in Boarding Schools

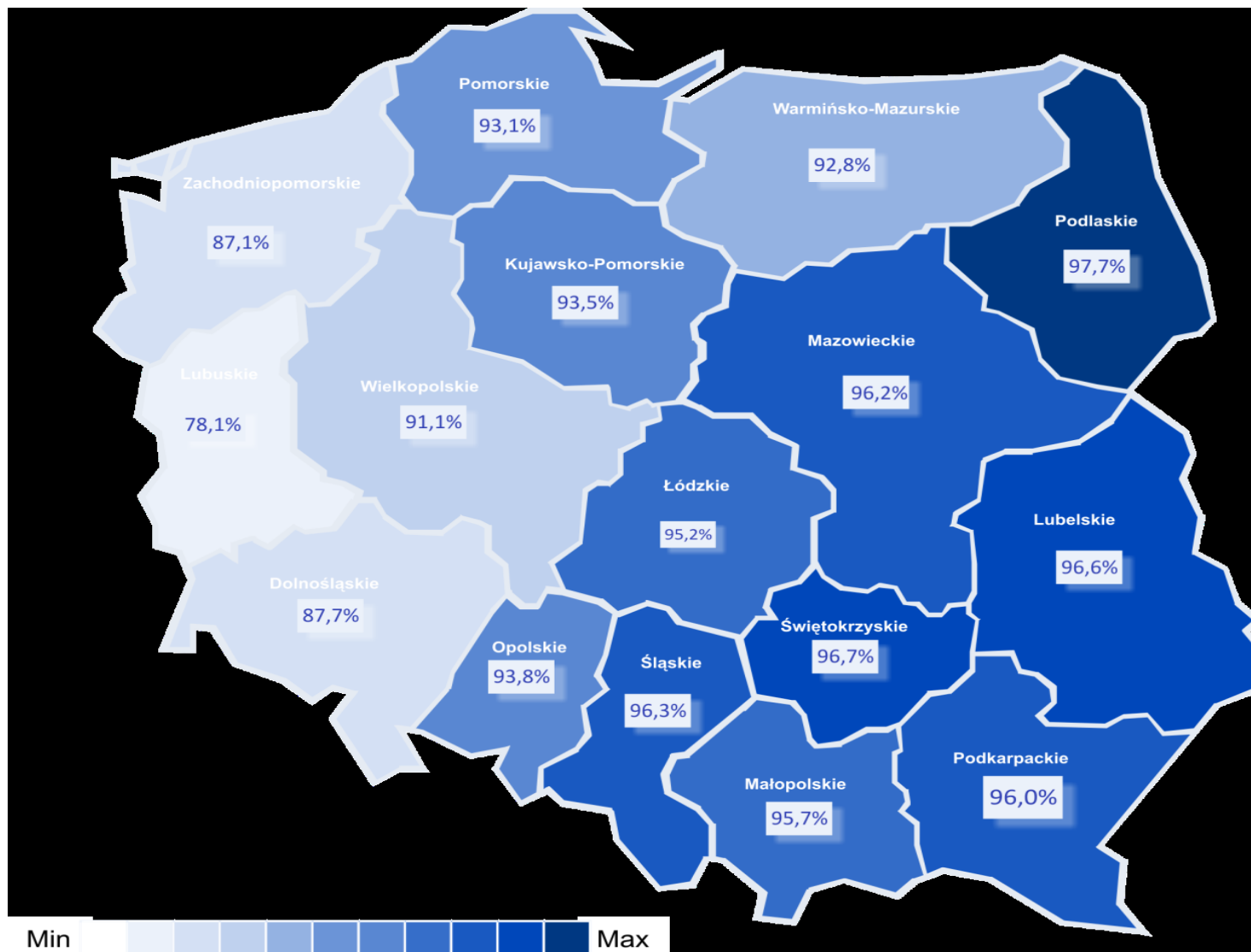
- About 500 Polish students in the UK boarding schools system
- Boarding Schools Scholarships Scheme run by British Alumni Society in Poland for the second year
10 candidates per place offered by the UK Schools
- Poznan International Education Fair (March 2013) and Warsaw (2012) – boarding schools present for the first time
- Media tour to the UK to raise interest in Poland in UK boarding schools
- Students 16-18 most likely to study in boarding schools

Foreign language teachers in Polish schools

Nauczyciele języka według typu szkoły w stosunku ogółu uczących języków obcych



English selected by students (all school levels)

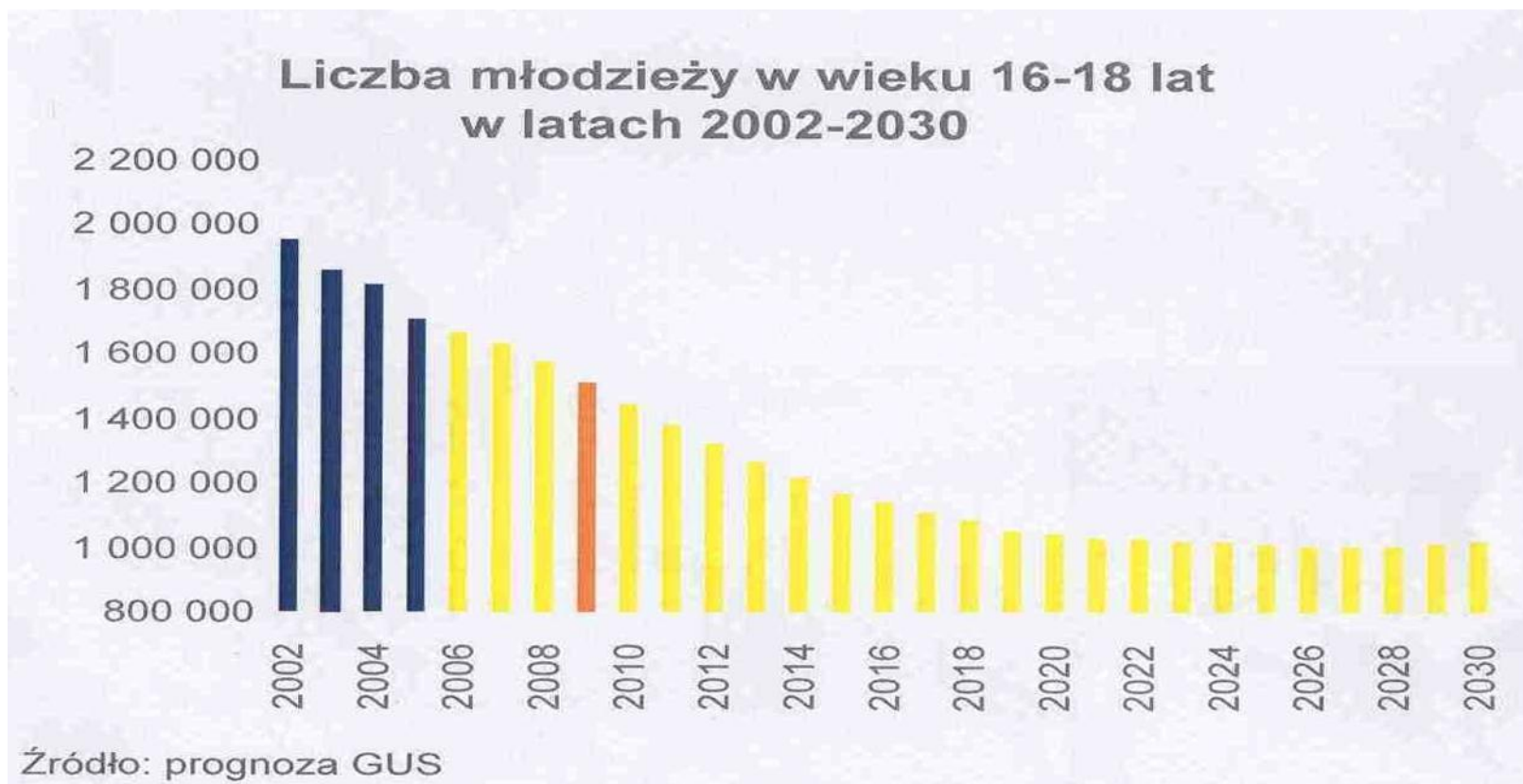


Students of English 2011/12

• Primary schools in cities	1 217 935
outside big cities	796 236
• Lower secondary in cities	734 023
outside big cities	408 578
• Upper secondary general	593 013
• Upper secondary technical	510 761
• Upper secondary vocational	105 526
 Total number of English learners at all school levels	 4 398 940

Demographics and its impact on the system

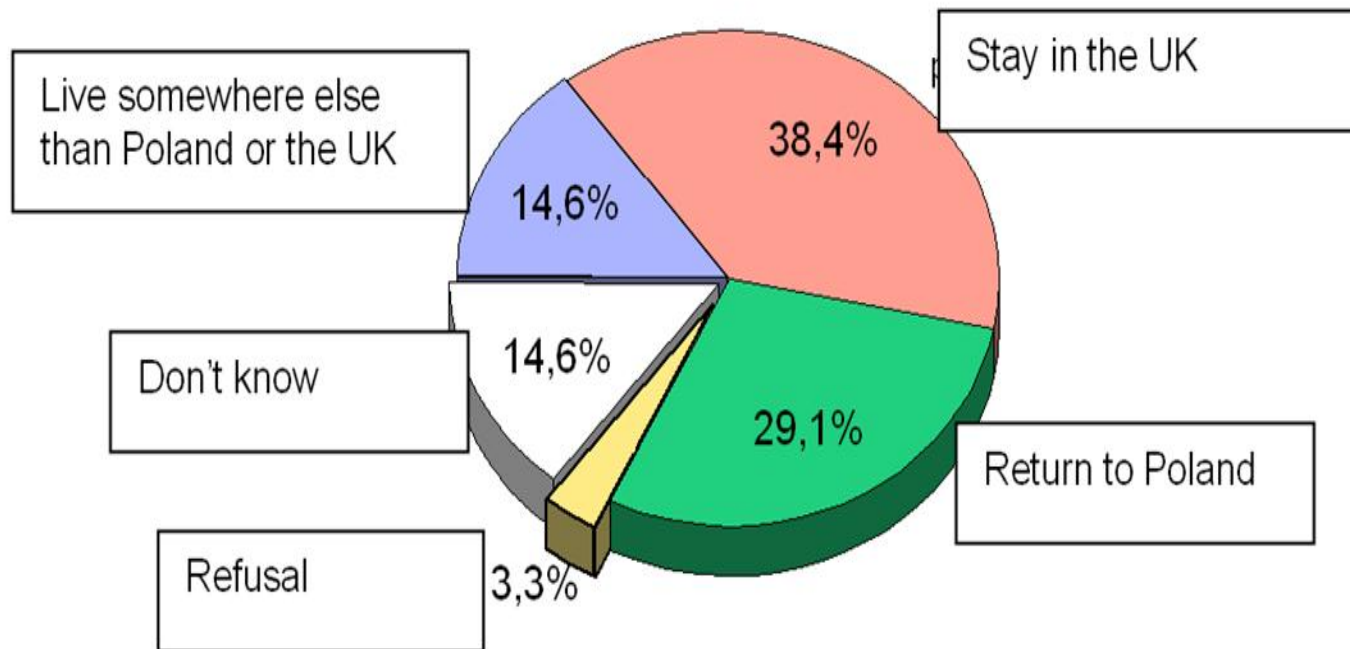
- The number of young people under 24 is about 12 million and decreasing (population of Poland over 38 million)
- The number of young people between 16-18 about 1,5 million. In 2020 it will decrease to about 1 million



Demographics and its impact on the system

- Closure of many schools and HE institutions (especially non-public)
- Growing competition among schools and HE institutions
- Acceptance of students at the cost of lowering/changing admission standards
- Competing for international students – growing offer of courses delivered in foreign languages
- Opportunities for TNE, joint and dual degrees, also on-line; joint research
- New opportunities for Higher Vocational Schools in Poland – new developing market for the UK FE Colleges

What are your plans after completing your studies in the UK?



How can British Council in Poland help you?

We have two offices with Teaching and Examinations Centres

- **Warsaw**, Aleje Jerozolimskie 59
- **Kraków**, Rynek Główny 6

Our Partnerships&Projects team work in the areas of Arts, English, Education &Society and SIEM

- **Education UK Exhibitions**
- **7 December 2013 Warsaw National Stadium**
- **21-23 February 2014 Poznan International Fair**
- **Direct Marketing**
- **Preparation of agents database; British Council on-line training**
- **Alumni network**
- **Education intelligence - consultancies**
- **Wide network of contacts in Schools and HE sector in Poland**

Useful websites

Ministry of Education <http://www.men.gov.pl>

Ministry of Science and Higher Education <http://www.mnisw.gov.pl>

<http://www.eurydice.org.pl/eurypedia>

<http://www.poland.pl>

Bureau for Academic Recognition and International Exchange:

<http://www.buwiwm.edu.pl>

Foundation for the Development of Education System – EU funded programmes <http://www.frse.org.pl>

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