



Article

Development Trends and Characteristics of The Higher Education Services Market of Uzbekistan

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Abstract: This article examines the dynamics, trends of higher education services market in Uzbekistan and the most important features of its development. The analysis presents statistical data on the change in the number of higher education institutions, the change in the number of students, the change in the form of study: full-time, evening, and correspondence, and the admission and graduation indicators for the period of 2018–2024. Special attention is paid to the strengthening of competition in the market of higher education services, the growth of activities of public and private higher education institutions, branches of foreign higher education institutions. We also assess the skew of higher education institutions across regions, the centralization level in the capital and regional centers, and an increasing demand for educational services in the regions. These study results build the foundation for reaching both scientific and practical conclusions concerning the provision of more balanced development of higher education services market, its increased competitiveness and human capital sustainability.

Keywords: higher education services market, higher education institutions, competitive environment, modes of study, human capital, regional development, quality of education, educational services.

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1. Introduction

In modern conditions, education is becoming one of the main factors in the development and introduction of new technologies in all spheres of activity to improve the competitiveness of a person and the standard of living [1].

Working with the idea of higher education as a social responsibility, we have a lot of candidates for students who would need to learn the best professional qualifications with social skills needed to remain competitive in a fast-changing instant labor market, to be well-endowed for the developing innovative economy and thus ensuring their well-being and the well-being of the entire society [2][3]. In many countries, given the increasing importance of higher education, development strategies have been determined and defined as national strategic priorities to enhance the quality and competitiveness of higher education [4].

The global labor market has affected the training of highly educated specialists and the requirements for their knowledge and skills. A heightened interest in Applying New Knowledge in Practice and recognizing the horizon of innovative opportunity in a particular occupational domain has created a demand that far exceeds that of competent theorists. So, the modern graduate should not only successfully solve the pressing issues of its economy and production, but also be a qualified specialist with analytical skills and sound judgments [5].

In this regard, the fast involvement of Uzbekistan in the industrial world of the new era requires a higher education system that is flexible and responds quickly to the needs of the rapidly changing labor market. And hence, the competition that develops the higher education institutions and pushes them towards providing high-quality educational services must be strengthened is the need of the hour [6].

Literature Review

Different foreign scholars (J. M. Keynes, A. Marshall, F. Kotler, A. Pigou, J. A. Schumpeter, M. Porter, P. Drucker, B. S. Santo, G. Mensch, G. P. Pisano and etc.) have studied the ways of development of the market of education services, and the fundamental foundations of competitiveness of the system of higher education [7][8].

CIS researchers investigate issues of education services market development and higher educational institutions competitiveness (V. S. Bazhenova, N. A. Bonyushko, V. V. Pilichev, I. V. Kotlyarevskaya, A. A. Efremova, T. G. Panichkina, Ye. M. Beliy, I. B. Romanova, Yu. Yu. Savchenko, and O. A. Kovalchuk [9][10].

Uzbek researchers, including Q Kh, have focused on the methodology for analyzing the state of forming the education services market, development of labor market, and personnel marketing. M. Q. Pardaev M. M. Mukhammedov, G. Akhunova, A. B. Saidov, T. Z. Teshaboev, A. A. Makhmudov, E. T. Odilov et al. Was defended at the Institute of National Economy of the Academy of Sciences of Uzbekistan, having graduated with honors from the university. Among studies dedicated to education services, we can mention A. A. Khamidova "Organizational and economic mechanisms of education services market development"; and S. A. Babanazarova "Improvement of organizational and economic mechanisms for increasing the efficiency and quality of education services"; G. S. Sadullaeva "Marketing strategies of the higher education services market development" [11][12][13].

This research analyses the situation in the higher education services market of Uzbekistan.

2. Materials and Methods

This study is based on an analytical framework for identifying developmental trends and structural features of the higher education services market in the Republic of Uzbekistan. The paper results from an analysis of statistical information, including 2018–2024 indicators of the number of higher education institutions, student enrollment, forms of study, dynamics of admission and graduation, and geographical location. This enabled consistency in the way the quantitative expansion compared with the qualitative transformation of the sector when looking at the data in a systemic and integrated way. Methods and methodologies: Analysis and synthesis were utilized to decompose complex market processes and to integrate findings into logical conclusions, respectively, while general scientific induction and deduction supported the examples discussed above, by allowing to create from some empirical data general patterns, and the overall theoretical assumptions were verified in empirical settings and vice versa [14]. Dynamic and comparative analyses facilitated an evaluation of temporal stability and structure change within the higher education market, focusing on the expansion of public, private, and civil society affiliated institutions. The use of statistical grouping and classification methods showed spatial concentration vs. diversification trends, and a comparison of the differences between regions and forms of study. Furthermore, this study combines institutional and market-based analysis for assessing the competitive context. This methodological bias guarantees objectivity and reliability based entirely on verified secondary data sources and non-controversial analytical methods, ensuring a firm empirical basis for competitiveness, regional balance and sustainability of human capital development assessment for the Uzbekistan higher education services market [15].

3. Results and Discussion

The object of the study is the activity of higher education institutions operating across the regions of the Republic of Uzbekistan. In the course of the analysis, a systemic and comprehensive approach was applied, along with methods of analysis and synthesis, induction and deduction, scientific abstraction, grouping of statistical data, observation, comparison, and comparative analysis.

The expansion of education services in quantitative terms and their qualitative improvement constitute a key condition for the country's socio-economic development. However, education does not always fully meet the modern requirements of the dynamically developing labor market. This is because the pace of educational development is strongly influenced by a wide range of factors. First and foremost, it is necessary to focus on these factors.

Thus, in analyzing the competitiveness of higher education institutions, it is appropriate to identify both external and internal factors.

External factors do not directly influence the activities of higher education institutions; however, they must be taken into account when assessing institutional competitiveness and determining competitive strategies.

Internal factors, in turn, represent the potential capabilities through which a higher education institution ensures its competitiveness.

The task of higher education management is to analyze external factors (the mega-environment, macro-environment, and micro-environment) and transform internal environmental factors into competitive advantages in the form of educational services.

All of the above-mentioned factors may have both positive and negative effects on the overall level of competitiveness of higher education institutions. While macro-level factors are common for all higher education institutions in the country, each institution has its own specific set of external influence factors that directly affect its performance.

1. External factors include:
 2. regulation of the education system by public authorities;
 3. legislative support and regulation of the provision of education services;
 4. competitors' strategies;
 5. market infrastructure;
 6. labor market conditions;
 7. demand for university graduates in the labor market;
 8. socio-demographic factors, and others.
9. Internal factors in the education sector include:
 10. quality and efficiency of education services;
 11. organizational management;
 12. quality of personnel training;
 13. business activity of the higher education institution;
 14. research and development activities;
 15. development strategies of higher education institutions;
 16. material and technical base;
 17. information resources;
 18. financial policy of the institution;
 19. incentives for staff and trainees;
 20. corporate culture of the higher education institution;
 21. system for managing institutional competitiveness;
 22. qualification level of academic staff, and others.

At present, comprehensive reforms are being implemented in Uzbekistan to develop the education system, particularly the higher education sector. This study analyzes the competitive environment in the education services market of Uzbekistan. According to the results of the analysis, the number of higher education institutions operating in the republic increased from 98 in 2018 to 219 in 2023, representing a 2.2-fold increase. During

the same period, the number of students enrolled reached 1314.5 thousand, increasing by 3.6 times (Table 1).

Table 1. Higher Education Institutions Operating in Uzbekistan

Indicators	Years						Growth in 2018-2024
	2018/2019	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	
Number of higher education institutions, units	98	119	127	154	191	211	2,15 times
Including branches of foreign higher education institutions	9	18	20	25	26	33	3,6 times
Including branches of foreign higher education institutions	360,2	441,0	571,5	808,0	1042,1	1261,0	3,5 times
Including those studying in departments, thousand people: in the full-time department	313,0	360,1	441,9	553,4	622,6	702,7	2,2 times
Evening	1,2	7,3	11,5	26,6	37,7	46,5	38,7 times
in the correspondence department	46,0	73,6	118,1	228,0	381,8	511,8	11,2 times
in the correspondence department	110	130	165	229	289	352	3,2 times
Number of admitted students, thousand people	114,5	138,1	174,9	235,9	282,4	311,1	2,7 times
Including departments: day department	86,2	111,6	132,7	166,7	196,4	216,1	2,5 times
Evening	-	3,2	6,0	9,0	10,5	13	-
in the correspondence department	28,3	23,3	36,2	60,1	75,5	81,9	2,8 times
Number of students admitted to bachelor's degree programs, thousand people	108,7	128,7	165,0	220,2	275,5	303,3	2,7 times
Including: daytime	80,4	102,5	123,0	151,6	187,8	204,9	2,5 times
Evening	0,0	3,1	5,8	8,7	9,4	11,8	-
Surface	28,3	23,1	36,2	59,9	78,3	86,6	3,6 times
Number of graduated specialists, thousand people	70,3	70,8	83,9	103,9	102,4	121,1	1,7 times
Number of graduated specialists, thousand people	21,5	21,0	24,0	29,6	29,5	33,1	1,5 times

The Concept for the Development of the Higher Education System of the Republic of Uzbekistan until 2030 determines the direction of activities, such as: "Development of public-private partnerships not only in higher education but also a significant step towards creating a competitive environment in higher education through the establishment of functioning in the regions public and non-governmental higher education institutions, as well as branches of prestigious foreign higher education institutions with the involvement of investments" [4]. And this policy laid the track for a growth in non-governmental higher education institutions rising to 90, from zero in 2018.

Over the same period, foreign higher education establishments grew 3.1-fold from 10 units in 2018 to 31 in 2023.

As can be seen from the table, the education services market of Uzbekistan has developed rapidly throughout the period of 2018–2024. The increases in the number of higher education institutions from 98 to 211 has amounted to a growth of 2.15 times. Specifically, the number of branches of foreign HEIs increased from 9 to 33, which is a more than 3.6-fold increase, which speaks of both the increased competition in the education market and activation of the processes of international integration. This, in turn, helps in the introduction of the contemporary education system and the quality of education.

The trends in student enrollment also validate the growth of the education services industry. The students expanded by 3.5 times from 360.2 thousand in 2018 to 1,261.0 thousand in 2024. While still accounting for the majority of students, full-time education is not the only item that has increased, because the rapid growth of students in evening and part-time modes of learning is significant. Specifically, evening education increased by 38.7 times, part-time education by 11.2 times, evidence of a diversification of educational needs and flexibility of educational formats.

Density of higher-education population coverage has sharply increased. Students per 10,000 population increased from 110 to 352: a 3.2-fold increase. In this instance, the indicator shows the improvement of policies to develop human capital and the growing accessibility of higher education. The number of student admissions has also grown steadily, from 114.5 thousand in 2018 to 311.1 thousand in 2024, an increase of 2.7 times.

Graduate dynamics are a testament to the education system. Between 2018–2024, number of graduates rose by 1.7 times from 70.3 thousand to 121.1 thousand. Meanwhile, the number of graduates per 10,000 population increased from 21.5 to 33.1, meaning that more and more highly educated specialists were added to the labor market. In general, the data shows that the higher education market in Uzbekistan is growing by numbers at a rapid pace, and that doors open quite widely to a higher education.

Nevertheless, the distribution of the number of higher education institutions in the regions of the country shows that competitive conditions in the markets for services of higher education

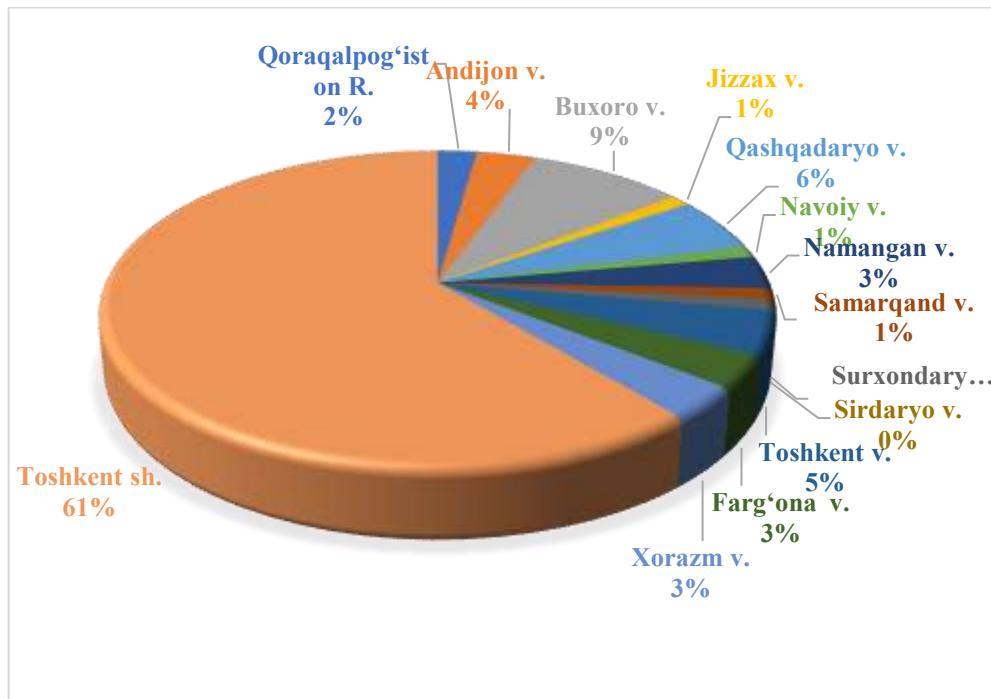


Figure 1. Distribution of non-state higher education institutions by region

Also of note from the table is the persistent trend of admissions to the bachelor degree level becoming the central domain of the higher education system.

From 2018 to 2024, the number of students enrolled in bachelorlevel courses grew 2.7-fold from 108.7 thousand to 303.3 thousand. Though full-time education is still the most common, part-time and evening education share of all education has been rising year on year. This trend is a natural response to the need for higher education to be more flexible, as well as the increase in learning opportunities for working youth and adults who study while in active professional life.

The transformation of the structure of forms of education is connected with the functioning of the labor market. The surge in admissions to part-time and evening programs reflects the increasing need for upskilling, retraining, and second higher education in most areas of the economy. The emergence and gradual expansion of evening programs in particular illustrate the emergence of a new segment of the education services market. In this way, this process helps align the education system with socio-economic needs.

In general, the indices given in the table prove that, the market of the educational services in Uzbekistan develops not only quantitatively, but also structurally. The network of institutions of higher education is being expanded, the enrollment is growing, and the modes of study are increasing diversely, which results in a strong base for human capital development. Over the long run, these processes will be instrumental in improving the innovative capacity and competitiveness of the country.

Now, the principles of social development of each state shall determine the transition to a new stage of the creation of conditions for acquiring modern professional knowledge. Consequently, there has been a constant increase in the number of higher education institutions (HEIs) in Uzbekistan since 2015/2016 academic year, from 47 in this period until 86 in the 2020/2021 academic year which is 84.1% increase. Region by region, the number of HEIs has increased in 12 regions of the republic, excluding Navoi and Namangan. Particularly, the greatest concentration of HEIs appears in city of Tashkent (51), Samarkand (12), Fergana (10), Surkhandarya (7), Kashkadarya (6), Tashkent Region (8), Andijan (6), Bukhara (5), and the Republic of Karakalpakstan (9) (Table, 2).

Table 2. Dynamics of higher education institutions across regions

Regions	Years						2018-2024 (Times)		
	2018/2019		2019/2020	2020/2021	2021/2022	2022/2023	2023/2024		
	Number of OTTs	in % of total					Number of OTTs	in % of total	
Republic of Uzbekistan	98		119	127	154	191	219		2,2
Republic of Karakalpakstan	6	6,1	9	9	10	10	12	5,5	2,0
Andijan r.	4	4,1	5	6	8	10	10	4,6	2,5
Buxoro r.	5	5,1	5	5	6	11	13	5,9	2,5
Jizzax r.	2	2,0	3	3	4	5	5	2,3	2,5
Qashqadaryo r.	3	3,1	6	6	6	9	11	5,0	3,6
Navoiy r.	2	2,0	2	2	2	4	4	1,8	2,0
Namangan r.	3	3,1	3	3	3	6	9	4,1	2,9
Samarqand r.	8	8,2	11	12	14	15	15	6,8	1,8
Surxondaryo r.	7	7,1	7	7	7	7	8	3,7	1,1

Regions	Years							2018-2024 (Times)	
	2018/2019		2019/ 2020	2020/ 2021	2021/ 2022	2022/ 2023	2023/2024		
	Number of OTTs	in % of total					Number of OTTs	in % of total	
Sirdaryo r.	1	1,0	2	2	2	3	3	1,4	2,9
Toshkent r.	5	5,1	5	8	8	10	13	5,9	2,5
Farg'ona r.	7	7,1	10	10	11	11	13	5,9	1,8
Xorazm r.	3	3,1	3	3	6	8	8	3,7	2,6
Toshkent city.	42	42,9	48	51	67	82	95	43,4	2,2

Table 1. The share of regional distribution and development of higher education institutions (HEIs) in Uzbekistan (2018–2024)

In general terms, during a period of over ten years, the total number of HEIs in the republic increased from 98 to 219, which is a growth of 2.2 times. This is evidence that state policy for a territorial expansion of the higher education system and balanced development of the education services market has been effective. Moreover, HEIs are uneven across regions: in some their proportion is big, in others low.

By region, Tashkent city naturally receives the biggest share. Share of HEIs in the capital of the republic Tashkent was equal to 42.9 percent of the total number of HEIs in 2018 and slightly increased to 43.4 percent in 2024 (Statistical yearbook of Uzbekistan, 2020). It signifies a 2.2 times increase in the number of HEIs in the capital from 42 to 95. This suggests both, that Tashkent still remains the scientific-educational center, and that the problem of excessive concentration of HES leaves to be a burning issue.

As for the regions, the number of HEIs increased the most in Kashkadarya (3.6 times), Namangan (2.9 times), Syrdarya (2.9 times), and Khorezm (2.6 times) regions. The share of these regions in the national scene has increased noticeably with the establishment of new HEIs and branch campuses in these regions. In the other regions (Samarkand, Fergana and Surkhandarya), the number of HEIs actually increased, but the growth rates were much lower 1, 1.1 and 1.4 times, respectively (higher initial base) (MiES, 2021).

In total, the data suggest that Uzbekistan is expanding its territorial network of higher education institutions, but the centralization trend continues. The increase in number of the HEIs in the regions facilitates the access of territories to higher education, while high share of Tashkent city remains hardly changed, indicating high concentration of human and material resources in the capital. Deployment of HEIs particularly in remote areas should be utilized strategically to ensure more equitable growth of the education services market in the future, and to enhance institutional capacity.

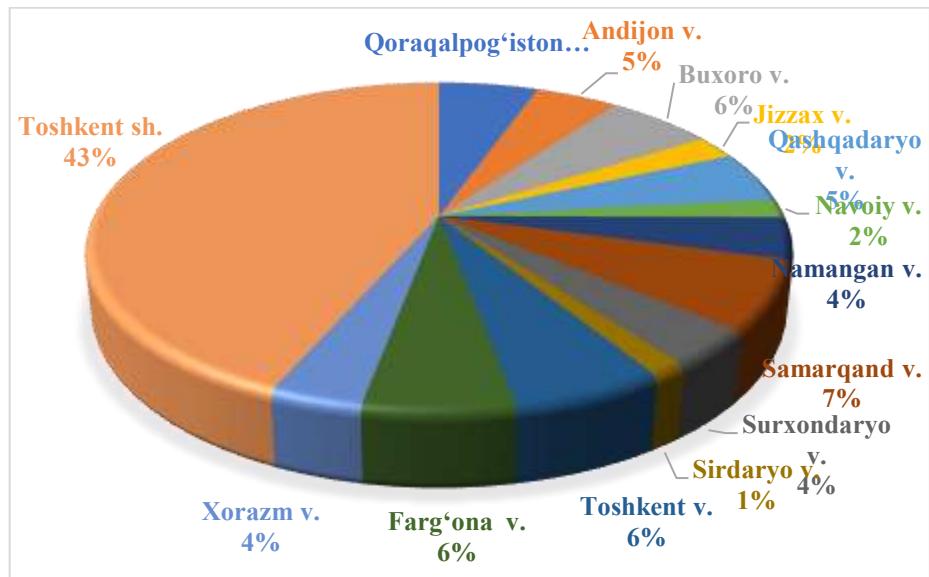


Figure 2. Distribution of higher education institutions by region

Such a rapid growth in the number of higher education institutions is an important step in meeting the needs of most business entities in Uzbekistan for highly educated specialists and increasing the share of highly educated specialists among those employed in the economy.

At present, a clear trend toward the massification of higher education and changing patterns of public demand for educational services can be observed in Uzbekistan.

This process is primarily associated with the formation of new requirements for human capital driven by the modern labor market. From this perspective, higher education serves as one of the key guarantees for a future specialist's employability and, consequently, for meeting their personal economic, cultural, and social needs.

Moreover, the current state of the market is increasingly based on the principle of lifelong learning, whereby acquiring a basic specialization is often accompanied by the desire to obtain a second higher education or to pursue studies at the master's and doctoral levels. This type of post-higher education is also encouraged by employers, contributing to the formation of specialists who continuously upgrade their knowledge and skills. The trends outlined above have significantly increased the number of consumers of higher education services, which has naturally been reflected in the activities of higher education institutions most notably through an increase in both the number and quality of educational programs. In this context, the role of educational institutions capable of meeting public demand for high-quality educational services that enhance individual competitiveness in the labor market is steadily growing.

4. Conclusion

As a result of rising demand, the education services market today is characterized by the operation of numerous higher education institutions of various levels and ownership forms. This, in turn, has intensified the competitive environment that facilitates the transition of the education system to market-based relations. Consequently, the need to enhance and effectively manage the competitiveness of higher education institutions is becoming increasingly important. The study of competitiveness concepts in the education services market leads to the conclusion that maintaining a high level of competitiveness of higher education institutions is one of the key factors for preserving and strengthening their market position. Through a clearly defined development strategy, the attraction of high-potential applicants, the provision of effective educational programs, the efficient allocation of available resources, the support and development of core activities, and the establishment of appropriate infrastructure for higher education development,

universities can achieve leading positions not only within the country but also in the global education services market.

1. Thus, based on long-term strategic objectives, it is advisable to develop the higher education system along the following priority directions:
2. Expanding access to higher education and improving the quality of training for highly qualified specialists;
3. Introducing digital technologies and modern teaching methods into the educational process;
4. Increasing the effectiveness of research activities in higher education institutions, actively engaging young people in scientific research, and forming an innovative scientific infrastructure;
5. Actively involving employers and workforce customers in the training of highly qualified specialists;
6. Strengthening the material and technical base of higher education institutions;
7. Ensuring systematic development of higher education institutions and improving management practices;
8. Enhancing the investment attractiveness of the higher education system and ensuring its international recognition and competitiveness.

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