GLOBAL EDUCATION MONITORING REPORT

2022

SOUTH ASIA

Non-state actors in education

WHO CHOOSES? WHO LOSES?

unesco

Sustainable Development Goals

Global Education Monitoring Report

IPS

IDARA-E-TALEEM-O-AAGAHI

CENTRAL SQUARE FOUNDATION

brac

IIDS Institute for Integrated Development Studies

CENTRE FOR POLICY RESEARCH

GLOBAL EDUCATION MONITORING REPORT

2022

SOUTH ASIA

Non-state actors in education

WHO CHOOSES? WHO LOSES?

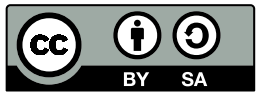
This publication is available in Open Access under the Attribution-ShareAlike 3.0 IGO (CC-BY-SA 3.0 IGO) licence (http://creativecommons.org/licenses/by-sa/3.0/igo/). By using the content of this publication, the users accept to be bound by the terms of use of the UNESCO Open Access Repository (www.unesco.org/open-access/terms-use-ccbysa-en).

The present licence applies exclusively to the text content of the publication. For the use of any material not clearly identified as belonging to UNESCO, prior permission shall be requested from: publication.copyright@unesco.org or UNESCO Publishing, 7, place de Fontenoy, 75352 Paris 07 SP France.

The designations employed and the presentation of the material in this publication do not imply the expression of any opinion whatsoever on the part of UNESCO concerning the legal status of any country, territory, city or area, or of its authorities, or concerning the delimitation of its frontiers or boundaries.

UNESCO is an Open Access publisher and all publications are made available online, free of charge through UNESCO's documentary repository. Any commercialization of its publications by UNESCO is for cost recovery of nominal actual costs for printing or copying content on paper or CDs, and distribution. There is no profit motive.

This publication can be referenced as: UNESCO. 2022. *Global Education Monitoring Report 2022 – South Asia – Non-state actors in education: Who chooses? Who loses?* Paris, UNESCO.



Published in 2022 by: the United Nations Educational, Scientific and Cultural Organization (UNESCO), 7, place de Fontenoy, 75007 Paris, France; BRAC, 75 Mohakhali Gulshan Address, 1212 Dhaka, Bangladesh; Institute for Integrated Development Studies, Mandikhatar, 044622 Kathmandu, Nepal; Institute of Policy Studies of Sri Lanka, 100/20 Independence Avenue, 07 Colombo, Sri Lanka; Idara-e-Taleem-o-Aagahi (Center of Education and Consciousness) Public Trust, 1-A Canal Park, Gulberg II, 54000 Lahore, Pakistan; Centre for Policy Research, Dharma Marg, Chanakyapuri, 110021, New Delhi, India; Central Square Foundation, 301-309- Narain Manzil, Barakhamba Road, 110001 Delhi, India.

© UNESCO, 2022
First edition
ISBN: 978-92-3-100556-5

For more information, please contact:
Global Education Monitoring Report team
Email: gemreport@unesco.org

Typeset by UNESCO
Graphic design and layout by Optima Graphic Design Consultants Ltd

Cover image: UNICEF/Altaf Ahmad
Caption: Children, left, walk to fetch water as schoolgirls walk back to their homes at Amarpur village near Udaipur, Rajasthan, India.

Any errors or omissions found subsequent to printing will be corrected in the online version at www.unesco.org/gemreport

This report and all related materials are available for download here: bit.ly/2022southasia

The Education 2030 Incheon Declaration and Framework for Action specifies that the mandate of the *Global Education Monitoring Report* is to be 'the mechanism for monitoring and reporting on SDG 4 and on education in the other SDGs' with the responsibility to 'report on the implementation of national and international strategies to help hold all relevant partners to account for their commitments as part of the overall SDG follow-up and review'. It is prepared by an independent team hosted by UNESCO.

The *Global Education Monitoring Report* team is responsible for the choice and the presentation of the facts contained in this book and for the opinions expressed therein, which are not necessarily those of UNESCO and do not commit the Organization. Overall responsibility for the views and opinions expressed in the report is taken by its Director.

The Global Education Monitoring Report team

Director: Manos Antoninis

Benjamin Alcott, Samaher Abdullah Nasser Al Hadheri, Daniel April, Bilal Fouad Barakat, Marcela Barrios Rivera, Madeleine Barry, Yasmine Bekkouche, Daniel Caro Vasquez, Anna Cristina D'Addio, Dimitra Dafalia, Dmitri Davydov, Ameer Arif Dharamshi, Francesca Endrizzi, Chandni Jain, Ulrich Janse van Vuuren, Priyadarshani Joshi, Maria-Rafaela Kaldi, Karim Hani Khalil, Josephine Kiyenje, Craig Laird, Katie Lazaro, Heidi Le Cohu, Kate Linkins, Camila Lima De Moraes, Alice Lucatello, Kassiani Lythrangomitis, Susanna Ndaruhutse, Anissa Mechtar, Patrick Montjourides, Claudine Mukizwa, Yuki Murakami, Vincent Périgois, Manuela Pombo Polanco, Judith Randrianatoavina, Kate Redman, Maria Rojnov, Divya Sharma, Laura Stipanovic and Benjamin West.

The *Global Education Monitoring Report* is an independent annual publication. The GEM Report is funded by a group of governments, multilateral agencies and private foundations and facilitated and supported by UNESCO.

ABOUT BRAC

Since its inception in 1972, BRAC has grown to become one of the largest non-governmental development organizations in the world. BRAC's work now touches the lives of an estimated 126 million people, with staff and BRAC-trained entrepreneurs numbering in the hundreds of thousands, a global movement bringing change to 11 countries in Asia and Africa. Its flagship BRAC Education Programme has over 35 years of global experience working with governments and successfully running schools focusing on children living in situations of poverty and inequality since its inception in 1985.

BRAC Institute of Educational Development is an active advocate and proponent in playing a key role in the education sector worldwide. From professional development to capacity building, research, advocacy and partnership, it aims to redefine, reframe and re-envision education to share the voice of South Asia and Africa.

BRAC team

BRAC Education Programme Director: Safi Rahman Khan

Papia Ferdousei

BRAC Institute of Educational Development Executive Director: Erum Mariam

Manzoor Ahmed, Sheikh Shahana Shimu, A.K.M. Badrul Alam, Kalam Md. Abul, Somnath Saha, Nashida Ahmed, Sima Rani Sarker, Hamim Al Ahsan, Mamunur Rashid

ABOUT THE CENTRE FOR POLICY RESEARCH

The Centre for Policy Research has been one of India's leading public policy think tanks since 1973. It is a non-profit, non-partisan, independent institution dedicated to conducting research that contributes to high-quality scholarship, better policies and a more robust public discourse about the issues that impact life in India.

Centre for Policy Research team

President and Chief Executive: Yamini Aiyar

Kiran Bhatty, Mridusmita Bordoloi, Avani Kapur, Mohammad Hamza, Anupriya Singh, Ram Ratan Jat, Vinod Verma

ABOUT CENTRAL SQUARE FOUNDATION

Central Square Foundation is a non-profit organization, working with the vision of ensuring quality school education for all children in India. Since 2012, it has been partnering with the government, private sector, non-profit organizations and other ecosystem stakeholders to improve the learning outcomes of children, especially from low-income communities. It is driven by its mission to enable the school education system to adopt solutions that are scalable, sustainable and effective, so that all children get equal access to opportunities needed for leading a better life.

Central Square Foundation team

Chief Executive Officer: Shaveta Sharma-Kukreja

Aditi Nangia, Stephanie Samuel, Amit Chandra and Rahul Ahluwalia

ABOUT THE INSTITUTE FOR INTEGRATED DEVELOPMENT STUDIES

The Institute for Integrated Development Studies is an independent, non-partisan and not-for-profit think tank headquartered in Kathmandu, Nepal. Since its inception in 1979, it has proven its commitment to research and policy advocacy based on evidence and a holistic approach to sustainable development.

Institute for Integrated Development Studies team

Executive Director: Bishwash Gauchan

Arun Joshi, Uttam Sharma, Ruzel Shrestha, Shishir Khanal, Aayushma Magar

ABOUT THE INSTITUTE OF POLICY STUDIES OF SRI LANKA

The Institute of Policy Studies of Sri Lanka is an autonomous economic research organization, established by an Act of parliament. Its mission is to conduct high-quality, independent, policy-relevant research to provide robust evidence for policymaking and improve the lives of all Sri Lankans. The institute functions under the key ministries involved in economic policymaking and implementation in Sri Lanka, working closely with the government, private sector, development partners, civil society and academia.

Institute of Policy Studies of Sri Lanka team

Executive Director: Dushni Weerakoon

Nisha Arunatilake, Ashani Abayasekara, Thisali de Silva, Sanjaya Ariyawansa, Chamini Thilanka and Jeewana Ariyaratne

ABOUT IDARA-E-TALEEM-O-AAGAHI

Idara-e-Taleem-o-Aagahi (Center of Education and Consciousness) Public Trust is a response to the profound crisis of education and multiple crises forming the nuts and bolts of the education challenge. It was born out of a growing realization that the most critical of human entitlements, the right to learning, knowledge systems, citizenship skills and 9,000 years of living heritage, are being denied to the citizens of Pakistan.

Idara-e-Taleem-o-Aagahi team

Chief Executive Officer: Baela Jamil

Sehar Saeed, Asif Sultan

South Asia: How can education equity and quality be protected as non-state provision grows?

SHORT SUMMARY

While governments have a duty to respect, protect and fulfil their citizens' right to education, a wide range of non-state actors with a variety of forms, arrangements and motivation, from charity to profit, play a significant role in many education systems.

This regional report focuses on South Asia, the world region with the strongest presence of non-state actors in education, and looks at their activities, primarily through the lens of equity and inclusion. It covers nine countries: Afghanistan, Bangladesh, Bhutan, India, the Islamic Republic of Iran, Maldives, Nepal, Pakistan and Sri Lanka.

Building on the 2021/2 *Global Education Monitoring Report*, this report draws extensively on data collection and expert analysis from collaborations with several institutional and individual partners from the region. The report has tried to triangulate multiple perspectives on the roles and contributions of non-state actors in education.

A series of country studies on provision, regulation, finance and influence were commissioned as well as five thematic studies on low-fee private schools; regulation of school education and supplementary tuition; public–private partnerships in skills development; teacher education; and ancillary services.

The six partners involved in publishing this report collectively conducted over 450 interviews and 4 focus group discussions for their research. Surveys on perceptions of desired roles of non-state actors in education were administered to some 250 state and non-state respondents.

42% of primary and secondary school students in South Asia are enrolled in non-state institutions

unesco

Since wars begin in the minds of men and women, it is in the minds of men and women that the defenses of peace must be constructed

Foreword

Non-state actors in South Asia grew to meet several education demands. The desire for higher quality closer to home; the preference for religious values in a changing world; the persisting demand for English language education; the rise of a market for tutoring to make up for where schooling had failed; and the need for quick solutions to cover in times of crisis all play a part in the region's now diverse education systems.

The critical question this report asks at this point is how governments can establish a just and effective oversight of the multiple actors. Whether a school is run by the state, by a religious organisation or by the community, the report reminds ministries that it should contribute to the common objective of delivering a quality, equitable education.

Education systems are dynamic entities, with capacity to absorb innovations, integrate new actors, and respond to labour market trends and community demands over time. Countries such as India and Pakistan have responded to this change, creating regulatory environments that are more flexible and less restrictive, and allow for innovation to prosper. But, as with any fast-paced developments, there is a risk that change may overtake capacity for control. Regulations, this report reminds us, lay the ground rules reflecting the core values of the objectives in our 2030 Agenda for Sustainable Development. When designed and enforced effectively, they keep all actors in check.

The report, *Who chooses? Who loses?* draws on the experience of the UNESCO *Global Education Monitoring Report*, and its six partners from the region: BRAC (Bangladesh); the Institute for Integrated Development Studies (Nepal); the Institute of Policy Studies (Sri Lanka); Idara-E-Taleem-o-Aagahi (Pakistan); the Centre for Policy Research (India); and the Central Square Foundation (India). Combining also experiences from Afghanistan, Bhutan, the Islamic Republic of Iran and Maldives, it looks at the occasions where equity issues have come under pressure with the growing advent of private education, and where positive practices have successfully created cohesion across all actors involved.

The rise of non-state actors in education has helped contribute to the fact that access to education has expanded more rapidly in South Asia in the past three decades than the rest of the world. However, the report asks ministries to consider who loses when choices of different forms of education are made available, and how we can ensure that their right to a quality education is not put at risk.

Discussed in national events across the region and at a regional forum where ministers will come together to compare experiences, this report provides a chance for governments to ensure that their choices in system design prioritize and fund solutions that will help those furthest behind. It is an important reference document for policymakers to take a reflective view of the status quo and make sure that equity and quality do not inadvertently slip through the cracks.

Stefania Giannini
Assistant Director-General for Education, UNESCO

Acknowledgements

This report would not have been possible without the valuable contributions of numerous people and institutions. The *Global Education Monitoring Report* team, BRAC, the Centre for Policy Research, Central Square Foundation, the Institute of Integrated Development Studies, the Institute of Policy Studies of Sri Lanka and Idara-e-Taleem-o-Aagahi would like to acknowledge their support and thank them for their time and effort. Special thanks go to our respective funders.

South Asia is home to one fourth of the world's population, with tremendous diversity in characteristics, challenges and needs. This regional report collaboration across the seven partners provided a unique opportunity to strengthen regional partnership, peer learning and collaborations. It aims to utilize the regionally important issue of the role of non-state actors in education to further national and regional dialogue and cooperation for the advancement of Sustainable Development Goal 4.

We thank Anjela Taneja and Kiran Bhatty for organizing a South Asia consultation with India experts for the South Asia regional report in March 2020, right before the start of the COVID pandemic. For other consultations, feedback and conference engagement, we would like to thank various academic and institutional experts: Rahul Ahluwalia, Monazza Aslam, Artur Borkowski, Donald Baum, Amita Chudgar, Lee Crawfurd, Pramod Bhatta, Dana Burde, Martial Dembele, Gauri Gupta, Ramya Madhavan, Maryam Soltanzadeh, Renu Singh, Namrata Tognatta, Padma Sarangapani, Prachi Srivastava and Aashti Zaidi Hai. The report team built on the extensive expert consultations and the research papers that were regionally relevant and conducted for the global report.

The report draws on the extensive primary and secondary data collection as well as expert analysis in the background papers and country studies that triangulate multiple perspectives on the role and contributions of non-state actors in education. The partners would like to thank their research teams, and the hundreds of stakeholders who shared the perspectives that ground these studies, including national and local officials and policymakers, civil society representatives, development partners, academic experts, non-state providers, teachers and students in public and private education systems.

The research team members of all studies are acknowledged below. We additionally thank the experts who engaged with us in three internal learning seminars on low-fee private schools, public–private partnerships and non-state actors in strong state contexts. We acknowledge the additional contributions of Juliana Zapata, Leena Bhattacharya (GEM Report Fellow), Kaviya Sekar (GEM Report intern), Moharram Aghazadeh; Aditi Nangia, Stephanie Samuel, Amit Chandra and Rahul Ahluwalia (Central Square Foundation team); and Dhir Jhingran (Language Learning Foundation).

The report was edited by Andy Quan, whom we thank for his tireless work. We also wish to acknowledge those who worked hard to support the design, production, printing and translation of the report within and outside UNESCO, including Rebecca Brite, Erin Crum, Optima Graphic Design Consultants Ltd and Strategic Agenda. Finally, thanks go to Matthew Becker and the Subornogram Foundation, Save the Children, UNICEF and the World Bank for extensive use of their photos.

Country studies

Afghanistan
Abdul Hamid Hatsaandh

Bhutan
Janet Schofield and Dolma Roder

Bangladesh
BRAC University and BRAC Education Programme: Manzoor Ahmed, A. K. M. Badrul Alam, Sheikh Shahana Shimu, Md. Abul Kalam, Mamunur Rashid, Somnath Saha, Nashida Ahmed, Simi Rani Sarker, Erum Mariam, Papia Ferdousei, Safi Rahman Khan, Hamim Al Ahsan

Islamic Republic of Iran
Saeed Paivandi

Maldives
Fawaz Ahmed and Mahamood Shougee

Nepal
Institute of Integrated Development Studies: Arun Joshi, Uttam Sharma, Ruzel Shrestha, Shishir Khanal, Aayushma Magar

Pakistan
Idara-e-Taleem-o-Aagahi: Sehar Saeed, Rastee Chaudhry, Basharat Ali, Hamza Sarfraz, Aqeel Awan

Sri Lanka
Institute of Policy Studies of Sri Lanka: Nisha Arunatilake, Ashani Abayasekara, Thisali de Silva

Background papers

- Prashant Narang and Tarini Sudhakar (Centre for Civil Society): Ease of operations for budget private schools in India
- Kiran Bhatty, Mridusmita Bordoloi, Avani Kapur, Mohammad Hamza and Anupriya Singh (Centre for Policy Research): Regulations of non-state actors in school education in India
- Divya Nambiar: Functioning and regulation of public–private partnerships in skills development
- Nishevita Jayendran, Ajay Kumar Singh, Poonam Sharma, Reema Govil, Manshvi Palan, Diksha Rehal, Shivani Sondhi and Utkarsha Chaudhary (Centre of Excellence in Teacher Education, Tata Institute of Social Sciences, Mumbai): Teacher education providers in India, Afghanistan and Nepal
- Ammar Malik and Moiz Hussain: Key ancillary service markets that affect the teaching and learning process in Pakistan
- Leena Bhattacharya (GEM Report Fellow): Changes in school completion rates of children in India: Examining the Right to Education Act, 2009

Contents

Short summary. VIII
Foreword IX
Acknowledgements. X
Contents XIII
Key messages XIV

CHAPTER 1. Introduction 1
South Asia is the world region with the highest share of enrolment in private institutions 5
There has been growth of non-state actors in education in response to limited state capacity and limited trust in government 10
Non-state actors are shaping education systems, but the scope of their involvement is contested 13
The South Asia regional report research and partnership 18

CHAPTER 2. Provision 21
There is wide diversity in non-state education provision 24
Conclusion 42

CHAPTER 3. Impact 45
Enrolment in non-state institutions mainly depends on ability to pay at each education level 47
Quality and innovation in education are not exclusive to any one type of actor 54
Non-state activities in education may be less efficient than commonly thought 64
Conclusion 67

CHAPTER 4. Governance and regulation 69
Responsibilities for managing and monitoring non-state provision are spread out 71
Regulations focus on entry and exit and not on equity and quality 74
Enforcement of regulations is riddled with implementation challenges 81
Provider experiences need to be reflected in better regulation 86
Conclusion 91

CHAPTER 5. Finance 93
Government financial support to non-state schools is limited 95
Many donors and foundations support non-state activity 99
Households end up bearing too large a share of education costs 103
COVID-19 had a strong financial impact on non-state providers 113
Conclusion 118

CHAPTER 6. Recommendations 121

References 126

Key messages

- **Non-state actors are significantly involved in every aspect of education systems in South Asia**
  providing services at all levels of education, while also influencing and shaping policies. All state and non-state activities must be viewed as part of one education system.

- **Inadequate supply and quality of public education, combined with parental aspirations, have driven private education expansion from early childhood to tertiary education.**
  About a third of students in India and Pakistan, and a quarter in Nepal, are in private schools that receive no state assistance. Over 90% of teacher education institutions in India are funded only by fees.

- **A highly competitive education system and labour market in the region have led to a major boom in private tutoring and the growth of education technology companies.**
  A premium on English-language education motivated a rise in international schools in Sri Lanka.

- **Non-profit actors and civil society institutions have played a major role in improving access for girls and the marginalized and in holding governments and the private sector accountable.**

- **Expansion of access, primarily through fee-based non-state activity, has not been equitable.**
  Non-state institutions are concentrated in urban areas and attended more by boys and privileged populations. In Bhutan, private early childhood care and education centres are attended primarily by families who can afford to pay.

- **Quality education is not the exclusive preserve of any one type of actor.**
  There is wide diversity in learning levels within the private schooling sector and faith-based institutions. After controlling for socioeconomic status, the relative advantage in learning outcomes that private schools enjoy is reduced or eliminated in India and Pakistan.

- **Innovation is often led by non-state actors, but no type of institution has a monopoly on it.**
  While non-state tertiary institutions have more flexibility to adapt, public institutions enjoy more prestige and research capacity. Non-state actors have advocated for foundational literacy and numeracy policies in early grades.

- **Existing regulations focus more on entry and input requirements than equity and quality.**
  Fee regulations are common in primary and secondary education, but less so at the tertiary level. Regulations are lacking for ancillary institutions and more recent forms of non-state activity.

- **Lack of adequate government capacity and mutual mistrust between government and non-state providers hamper regulation enforcement.**
  Fragmented education systems, where state and non-state institutions are not governed as a single system, are another critical issue.

- **Public–private partnerships in technical and vocational education attempt to catalyse private-sector support for skills training.**
  Lessons from India's National Skill Development Corporation show that success in partnerships requires clear roles, regulatory oversight and governance mechanisms, the flexibility to drive innovation and a clear alignment of interests and objectives.

- **Households are burdened by expenditure due to inadequate government financing.**
  Poor learning outcomes lead households to pay for better education. Public institutions are often not free. High spending by wealthy families creates major inequality in education opportunities between richer and poorer households.

- **Teachers do not enjoy the same benefits and working conditions in public and private schools.**
  It is necessary to improve state and non-state teacher preparation systems, promote professionalization and include teachers in decision making.

- **The desired scope of non-state activity in education and views of its value are debated.**
  While diverse stakeholders acknowledge non-state actors' positive contributions, profit-making and business interests are viewed with scepticism and concern because of commercialization.

- **COVID-19 has exposed the fragility of the fragmented education systems in the region.**
  Private schools and their teachers and students have faced heavy financial consequences, and parents have had to reassess their education priorities. Institutions that were already well-resourced were able to cope better, thus likely exacerbating inequality.

Students participate in class while listening to the teacher at the Sujat Nagar urban slum school in Dhaka, Bangladesh.

CREDIT: Dominic Chavez/World Bank

CHAPTER

1

Introduction

KEY MESSAGES

- Non-state actors, defined broadly, are significantly involved in every aspect of education in South Asia, providing services at all levels while also influencing and shaping policies.
- Several factors have limited trust in government in South Asia. In India only 46% of adults agreed that the primary responsibility for providing school education rested with the government, the lowest share among 35 middle- and high-income countries.
- South Asia is the world region with the highest share of private enrolment in institutions. The rapid expansion of education access has been associated with substantial growth of non-state schooling provision in primary and secondary education, albeit with low learning levels.
- Debates on the role of non-state activity vary. At the compulsory education level, the focus is on the issue of profit making and concern about commercialization of education. At other education levels, such as early childhood and technical education, non-state actors' engagement is an inherent feature and collaboration is generally accepted.
- Policy changes in India and Pakistan have emphasized flexibility, autonomy and fewer restrictions. In the Punjab and Sindh provinces of Pakistan, private–public partnerships are viewed as important contributors to the expansion of access to education. India's National Education Policy 2020, which proposes to make infrastructure requirements on schools 'more responsive to realities on the ground', marks the latest step in increasing facilitation of private engagement in education.
- Civil society plays a central role in holding governments accountable for their education commitments. Large-scale movements have been launched in South Asia. The Annual Status of Education Report, the world's largest citizen-led learning assessment, which drew attention to low learning levels in South Asia and the rest of the world, began in India in 2005.

South Asia is the world region with the highest share of enrolment in private institutions 5

There has been growth of non-state actors in education in response to limited state capacity and limited trust in government 10

Non-state actors are shaping education systems, but the scope of their involvement is contested 13

The South Asia regional report research and partnership 18

The Education 2030 Framework for Action, which is the roadmap for achievement of Sustainable Development Goal (SDG) 4, highlights the crucial role of non-state actors in education (**Box 1.1**): 'Country-led action will drive change; however, the ambitious education goal cannot be achieved by governments alone. They will need the support of all stakeholders, including non-state actors' (UNESCO, 2015, §86).

The framework recognizes (§10) that education is 'a public good, of which the state is the duty bearer' and 'a shared societal endeavour, which implies an inclusive process of public policy formulation and implementation', with civil society and the private sector, among others, having 'important roles in realizing the right to quality education' and the state having an essential role in 'setting and regulating standards and norms' for 'a fundamental human right and an enabling right' for whose fulfilment countries must 'ensure universal equal access to inclusive and equitable quality education'.

Despite the understanding that fulfilling the right to education requires multiple stakeholders and that the role of non-state actors has increased over the past 30 years, non-state involvement in education generates passionate debate, particularly over two key concepts: the extent to which education is a public or private good, a form of investment or consumption; and how to interpret the right to education with respect to its implications for state and non-state actors' responsibilities.

Governments take on the high cost of delivering education because of its public good qualities – in other words, the wider benefits to societies and economies. An educated workforce helps develop the economy, while public schools develop and strengthen a sense of national identity. Without state provision, individuals might not invest as much in education, reducing societies' potential.

But education also has strong private good qualities. Consuming more education improves an individual's opportunities. Education is a vehicle for differentiation and advancement. Those who manage to climb the education ladder are better placed to improve their standard of living. As education systems cannot accommodate everybody on the higher rungs, families do everything they can to ensure that their offspring make it to the top.

Such competition generates demand, which in turn leads to supply of education goods and services. Depending on national context and disposition, markets may emerge in direct provision of education or in other services that confer advantage, such as supplementary tuition. Governments differ in the extent to which they provide sufficient financing for education – or, alternatively, facilitate provision of education goods and services by non-state actors – as a means of respecting, protecting and fulfilling the right to education.

BOX 1.1:

This report's definition of non-state actors in education is broad

In this report, 'non-state' is a broad, catch-all term describing individuals and organizations involved not only in education provision, but also in education financing and in influencing the state's direction in its obligation to fulfil the right to education.

As such, the term is used in reference to:

- Individuals who benefit from and/or pay for education (e.g. users or purchasers of goods and services, taxpayers), provide education (e.g. single school proprietors, homeschooling providers) and express views on its content, modality and delivery (e.g. through participation in school management, through the political process).
- Private corporations which also provide education-related goods and services (as owners or managers) and which finance (directly and indirectly) and influence education.
- Philanthropic foundations, independent of private entities in their direction, which mainly influence education policy, but also play limited roles in provision and financing.
- Non-governmental, civil society, trade union and faith-based organizations, which may provide, finance and influence education.
- Academics, researchers and think tanks, even if financed by government, who generate evidence and knowledge on education.
- The media, which exert influence in the debate on the role of non-state actors in education.

The above description makes it clear that the terms 'non-state' and 'private' are not interchangeable. Rather, private actors are a subset of non-state actors.

This right encompasses both entitlements and freedoms. Individuals have a right to free and compulsory education, the duration of which varies by country. But also recognized are individuals' rights to choose the type of school they prefer for their children, in line with their religious and moral convictions, as long as these schools meet minimum government standards. Four principles have been associated with fulfilment of the right to education. There have to be enough schools with appropriate infrastructure, trained teachers, and teaching and learning materials; the schools have to be accessible to all, without discrimination or physical, technological or financial obstacles; curricula and teaching methods have to be acceptable, relevant, culturally appropriate and of good quality; and education has to be flexible and adaptable to changing societal and community needs (OHCHR, 1999).

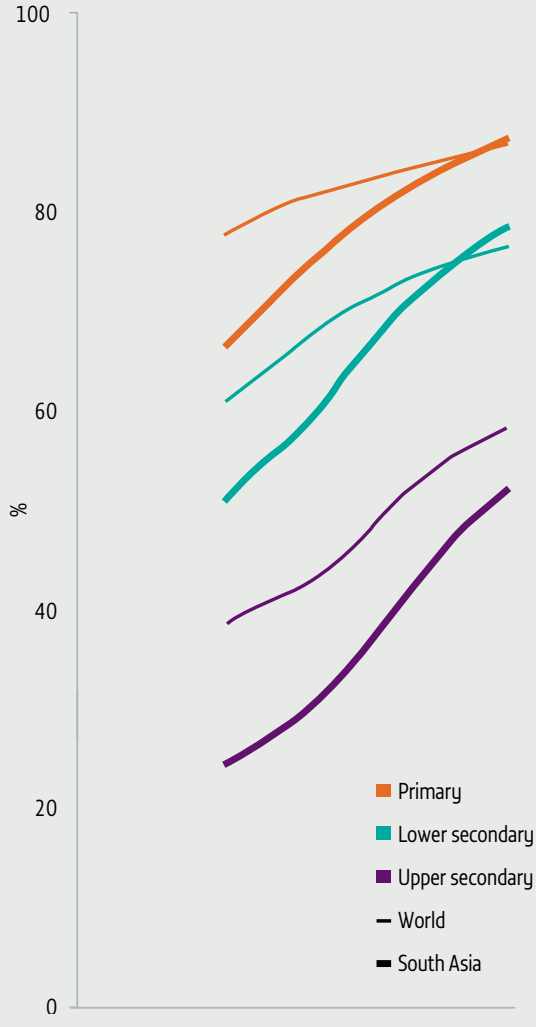
If governments are responsible for meeting these principles, questions arise on how they should intervene. Should they provide, finance or regulate education? All of these? In what mix? At what point might such activities violate the right to education? While governments have a duty to respect, protect and fulfil their citizens' right to education, a wide range of non-state actors with a variety of forms, arrangements and motivation, from charity to profit, play a significant role in many education systems. Their activities may or may not involve collaboration with the government. Should non-state actors' participation in education be encouraged, contained or prevented? The answers may be specific to country context, education level and type of activity. The non-state sector exists in relation to the state. The centrality of government decision making in guaranteeing people's right to education, including how it is funded and provided, influences the roles of non-state activity in any education system.

Proponents and opponents of non-state actors in education argue their cases in relation to the capacity and legitimacy of state and non-state actors to promote efficiency, equity and inclusion, and innovation in education. This regional report focuses on South Asia, the world region with the strongest presence of non-state actors in education at all levels, and looks at their activities primarily through the lens of equity and inclusion. It covers nine countries: Afghanistan, Bangladesh, Bhutan, India, the Islamic Republic of Iran, Maldives, Nepal, Pakistan and Sri Lanka. This chapter shows how South Asia stands apart from other world regions, introduces some of the factors that explain the growing role of non-state actors in education and outlines the positions governments are taking as well as the views of opponents and proponents of a bigger role for non-state actors. It concludes by providing a guide to the report.

SOUTH ASIA IS THE WORLD REGION WITH THE HIGHEST SHARE OF ENROLMENT IN PRIVATE INSTITUTIONS

South Asia has experienced rapid education expansion in the past three decades, outpacing the rest of the world. In 2000, the primary and lower secondary completion rate in South Asia was some 10 percentage points below the global average; by 2020, the gap had not just been closed but reversed. The gap in the upper secondary completion rate fell from 14 to 6 percentage points during this period (**Figure 1.1**).

FIGURE 1.1:
Education has expanded rapidly in South Asia
Completion rate, by level, world and South Asia, 2000–20



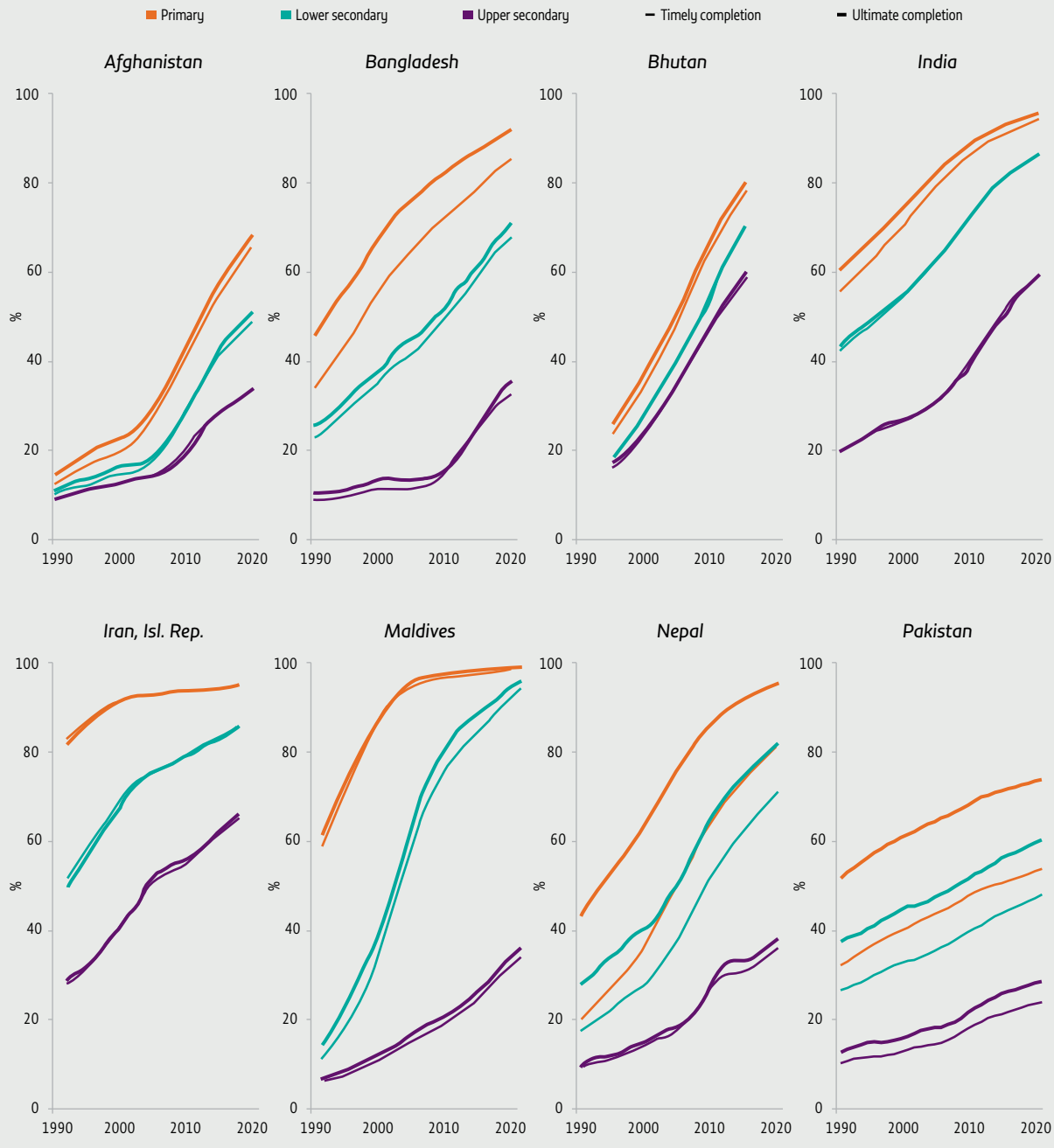
Source: GEM Report team estimates.

The primary completion rate in Nepal increased by two percentage points per year, on average, from 21% in 1990 to 82% in 2020; taking into account late enrolment, 95% of children reached the last year of primary school, meaning Nepal almost achieved universal primary completion within a generation. Afghanistan and Bangladesh increased their primary completion rate by 1.7 percentage points in the 30-year period; in the case of Afghanistan, the progress accelerated rapidly after the fall of the Taliban regime in 2001. In Bhutan and Maldives, lower secondary completion rates increased by about three percentage points per year between 1995 and 2015, among the fastest rates of expansion ever observed. In India and the Islamic Republic of Iran, the upper secondary completion rate increased by almost 1.5 percentage points per year. The only country where education expansion was below one percentage point per year was Pakistan. By 2020, just 56% of its children completed primary school on time, although 74% ultimately did so; 6 in 10 completed lower secondary and 3 in 10 completed upper secondary education, the lowest rates in the region, alongside Afghanistan (**Figure 1.2**).

Education expansion has taken place at the same time that concerns have been mounting about the quality of education. Data are particularly patchy and based on very few observations that are linked to the global minimum level of proficiency. The UNESCO Institute for Statistics (UIS) has nevertheless recently attempted to estimate relevant averages. For example, by the end of lower secondary education, 24% of students in Central and Southern Asia, compared with 41% globally, achieve minimum proficiency in reading. When this is adjusted for the fact that about one in five does not complete lower secondary school, and assuming that none of those who leave school early manage to learn the basics, 19% of adolescents in Central and Southern Asia, compared with 32% of adolescents globally, achieve minimum proficiency in reading. Between 2000 and 2020, the estimated annual growth in the share of those who achieved minimum proficiency was somewhat slower in Central and Southern Asia (0.43 percentage points) than the rest of the world (0.56 percentage points). Similar conclusions were reached in the case of mathematics proficiency (**Figure 1.3**).

Data from household surveys confirm that levels of learning are low. These surveys estimate learning to be at levels well below global minimum proficiency. For instance, the UNICEF Multiple Indicator Cluster Surveys (MICS) administered a foundational learning module to a sample of 7- to 14-year-olds who may or

FIGURE 1.2:
Over the past 30 years, some South Asian countries have achieved some of the fastest education expansion rates ever observed
Completion rate, by country, level and timeliness, 1990–2020

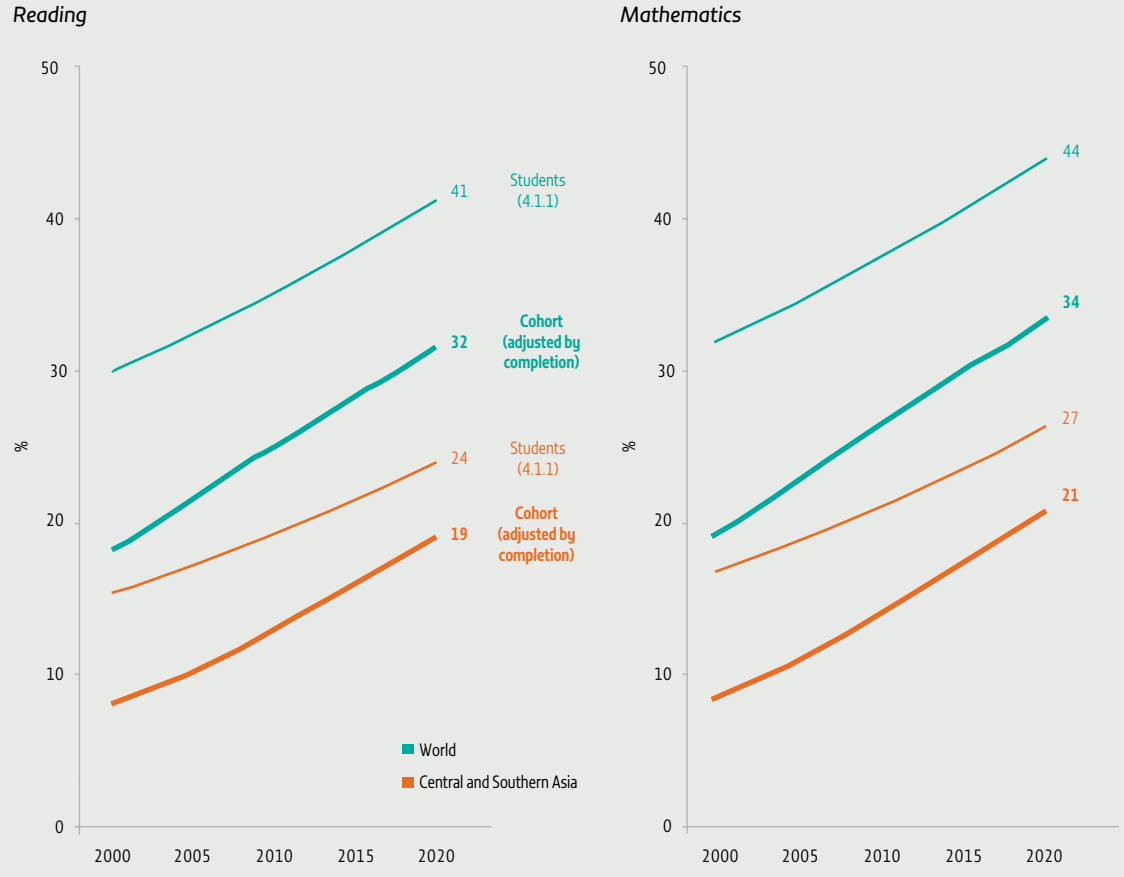


Note: No estimate is available for Sri Lanka.
Source: GEM Report team estimates.

FIGURE 1.3:

Learning levels in South Asia are more than one third below the global average and growing more slowly than in the rest of the world

Percentage of students and adolescents with minimum learning proficiency in reading and mathematics by the end of lower secondary education, world and Central and Southern Asia, 2000–20



Note: Indicator 4.1.1 is the proportion of children and young people achieving at least a minimum proficiency level in reading and mathematics.
Source: UIS (learning) and GEM Report (completion) estimates.

may not be in school. Foundational reading skills are defined as the abilities to correctly read 90% of words in a short story and correctly answer three literal and two inferential questions. The proportions of grade 5 students with these skills were 64% in Bangladesh, 56% in Punjab province, Pakistan, 43% in Sindh province, Pakistan, 39% in Nepal and 23% in Balochistan province, Pakistan (**Figure 1.4a**).

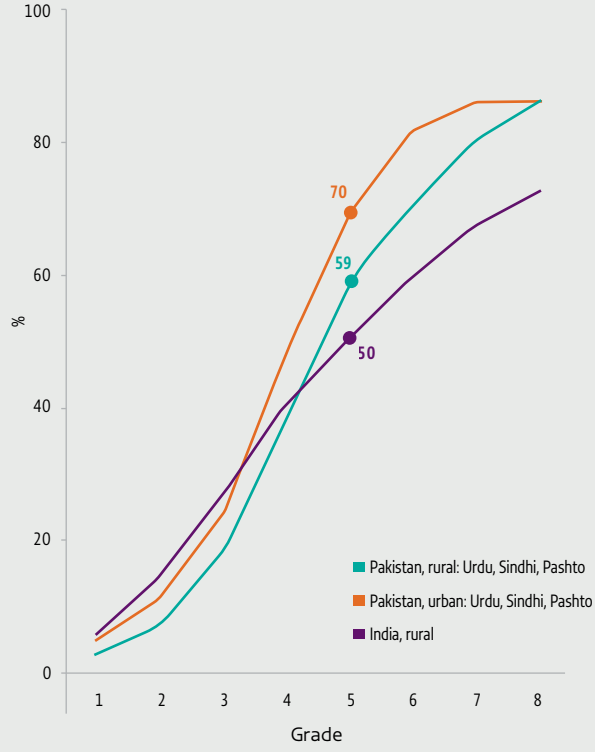
Foundational numeracy skills are defined as the abilities to correctly do a number reading task, a number discrimination task, an addition task and a pattern recognition task. Among grade 5 students, the percentages of those who could do addition tasks were 68% in Bangladesh, 61% in Nepal, 20% in Sindh, 19% in Punjab and 1% in Balochistan.

FIGURE 1.4:
Most students in South Asia acquire foundational literacy skills too late

a. Percentage of students with foundational literacy skills, by grade, 2017–20

Source: MICS survey findings reports.

b. Percentage of students who can read sentences, by grade, 2018–19



Sources: ASER India (2019) and ASER Pakistan (2020a; 2020b).

The Annual Status of Education Report (ASER), a series of citizen-led assessments, evaluates learning at levels similar to or below the MICS. The share of students who could read a grade 2 level text at grade 5 was 50% in rural India in 2018, while in rural Pakistan in 2019 it was 59% in Urdu, Sindhi or Pashto and 55% in English (**Figure 1.4b**). Mounting evidence suggests that learning levels have fallen after two years of school closures due to the COVID-19 pandemic.

Rapid education expansion and low learning levels have been associated with rapid expansion of non-state schooling provision in primary and secondary education. The UIS defines private education institutions as those 'not operated by a public authority but controlled and managed, whether for profit or not, by a private body (e.g. non-governmental organization, religious body, special interest group, foundation or business enterprise)'. The share of private institutions doubled in primary education – both worldwide, increasing by 9 percentage points in 20 years, from 10% in 2000 to 19% in 2020, and in South Asia, growing by 19 percentage points, from 19% to 38%. The share of private institutions in secondary education increased by 8 percentage points in 20 years, both globally, reaching 27%, and in South Asia, reaching 50%. In both cases, South Asia is the world region with the highest share (**Figure 1.5**).

In pre-primary education, a period of expansion of public services in South Asia between the mid-1980s and early 2000s was followed by a rapid expansion of private provision, from 21% in 2013 to 32% in 2020, although this was still below the global average of 38%. At the tertiary level, the share of enrolment in private institutions in South Asia was 49% in 2017, just below Latin America and the Caribbean, but well above the global average of 33%. The share remained constant in South Asia in the 2010s as increasing shares in India, Nepal and Sri Lanka were balanced by decreasing shares in Bangladesh, the Islamic Republic of Iran and Pakistan.

FIGURE 1.5:

In South Asia, the shares of private enrolment in primary and secondary education are the world's highest

Share of enrolment in private institutions, by education level, 1970–2020

Source: UIS database; Buckner (2021), based on data from the UIS and the Program for Research on Private Higher Education for tertiary education averages.

TABLE 1.1

Share of enrolment in private institutions, by education level, 2020 or latest available year

	Pre-primary	Primary	Secondary	Tertiary
Afghanistan	...	7	4	54
Bangladesh	55	24	94	36
Bhutan	14	4	10	13
India	25	45	51	57
Iran, Isl. Rep.	98	15	11	43
Maldives	36	4	5	49
Nepal	47	25	24	37
Pakistan	39	34	34	21
Sri Lanka	80	3	...	12
South Asia	32	38	50	49
World	38	19	27	33

Source: UIS database.

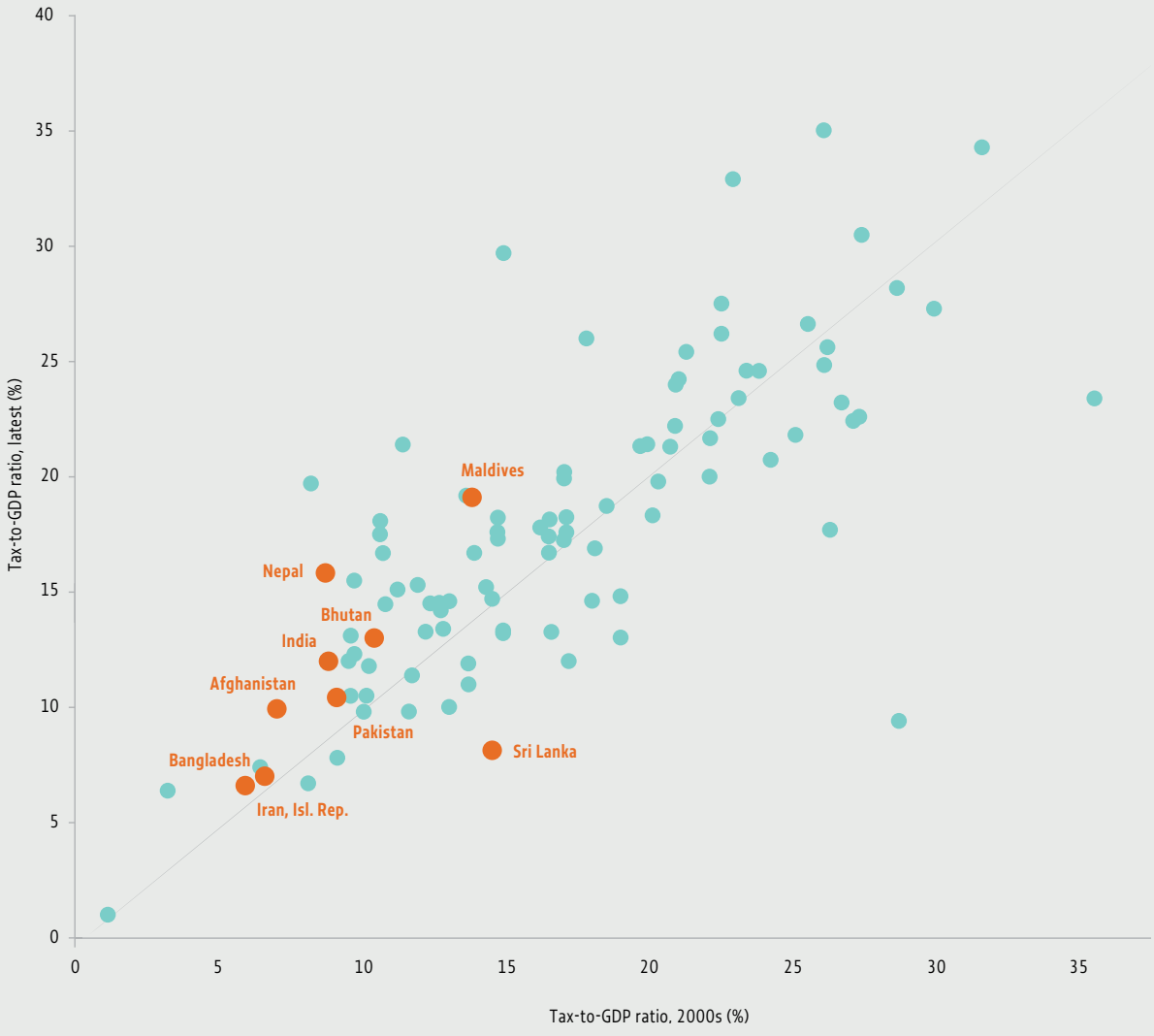
India is driving the regional averages at all levels except pre-primary education (25%), where its share of enrolment in private institutions is below average. It is above the global average in primary (45%) and tertiary (57%) education. The Islamic Republic of Iran (98%) and Sri Lanka (80%) have the highest shares in pre-primary education, while their respective shares in primary and secondary education have historically been well below the average, as have those in Afghanistan, Bhutan and Maldives. Bangladesh (94%) has the highest share in private secondary education although, as will be explained, these schools are heavily subsidized by the government. Private tertiary education expanded rapidly in Afghanistan in the 2010s (**Table 1.1**).

THERE HAS BEEN GROWTH OF NON-STATE ACTORS IN EDUCATION IN RESPONSE TO LIMITED STATE CAPACITY AND LIMITED TRUST IN GOVERNMENT

Contemporary and historic socioeconomic and political factors provide some explanation for the high, albeit variable, presence of non-state actors in South Asian education systems. One key reason governments have trouble expanding public education systems is their small budgets. South Asian countries have long had some of the world's lowest tax ratios as a percentage of gross domestic product (GDP), with little progress over the past 20 years. Afghanistan, Bangladesh and Pakistan have been trapped at GDP ratios around or below 10%, while India has never exceeded 12%. Sri Lanka, which is experiencing a deep financial crisis, has regressed with respect to its tax revenue-raising capacity (**Figure 1.6**).

Socioeconomic inequality is another factor. Some of it is entrenched, based on caste, religion and ethnicity, which have created social fault lines. Most countries have experienced prolonged armed conflict periods, often related to some of these factors. Insurgencies have presented serious challenges in India, Nepal, Pakistan and Sri Lanka. While there has been a resurgence of state power, many areas of contestation remain (Staniland, 2020). National cohesion crises, such as the 25-year civil war in Sri Lanka or the 10-year civil war in Nepal, have

FIGURE 1.6:
Domestic resource mobilization is low in South Asia
Tax-to-GDP ratio, 2000s and latest values



Sources: World Development Indicators; OECD (2022) for Pakistan; Pars Today (2021) for the Islamic Republic of Iran.

effects that last long after the conflicts have ended (Richards et al., 2022). Afghanistan is dealing with the aftermath of two decades of US military intervention and the return of a Taliban government in 2021.

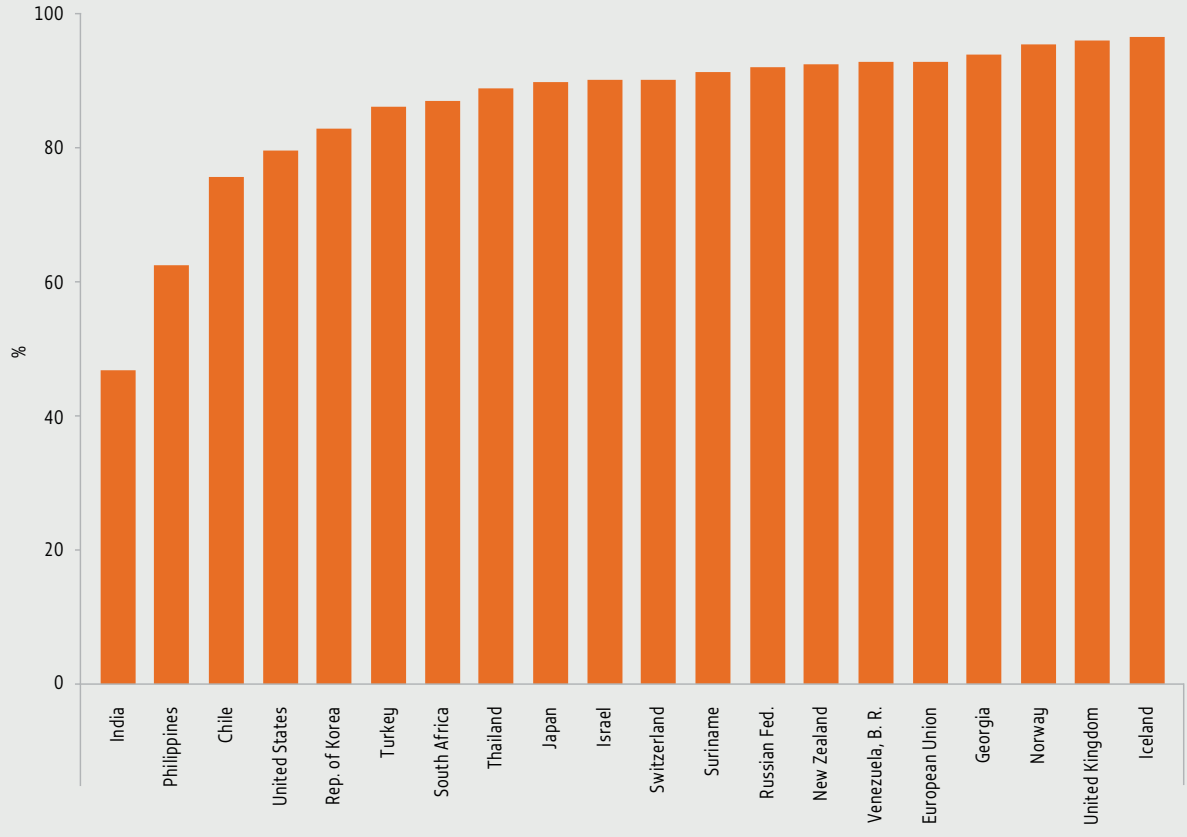
South Asian and Latin American countries have the world's highest agricultural land inequality (Bauluz et al., 2020). Analysis of differential land concentration in Pakistani villages shows that inequality affects the quality of public services that richer households can opt out from, such as public schools, though it does not as significantly affect services everyone needs, such as public transport, electricity and drainage systems (Rama et al., 2015).

In India, economic liberalization in the 1990s increased aspirations, creating a competitive labour market, but also increased income inequality. According to the World Inequality Database, India had the lowest income inequality in South Asia in 1995, with a Gini index of 0.23; by 2021, it had the region's highest income inequality, with a Gini index of 0.33.

There are indications that the general public in South Asia lacks trust in government institutions and service delivery. This may be the result of inequality or major episodes of unrest (Acemoglu et al., 2020; Paul, 2010). The responsiveness of governments in providing or regulating public services, their reliability in anticipating change and protecting citizens, their integrity regarding ethical use of power and public resources, their openness in engaging with citizens and the fairness of their efforts to improve living conditions for all citizens are key drivers of trust in government institutions (Brezzi et al., 2021). Deficits in these areas have negatively affected trust in government in South Asia (Naseer, 2010).

Analysis of the 2016 International Social Survey Programme (ISSP) special module data on the role of government, commissioned for the 2021/2 *Global Education Monitoring Report*, addressed support for public education using a sample of 35 countries, including 10 middle-income countries (Edlund and Lindh, 2021). There was generally strong support for public education provision, but in India, the only South Asian country included, just 46% of adult respondents agreed that the government had primary responsibility for providing school education (**Figure 1.7**).

FIGURE 1.7:
Support for public provision in education among middle- and high-income countries is lowest in India
Percentage of adults saying the primary responsibility for providing school education rests with the government, 2016



Source: Edlund and Lindh (2021) based on the 2016 ISSP.

NON-STATE ACTORS ARE SHAPING EDUCATION SYSTEMS, BUT THE SCOPE OF THEIR INVOLVEMENT IS CONTESTED

The debate around the role of non-state actors in education is divided between those who focus on the state's responsibility to fulfil the right to education and those who advocate for multi-stakeholder partnerships that acknowledge the many roles played by non-state actors. Networks with different positions on this question mobilize to influence national policy development, providing differing diagnoses on what has caused weak public-sector capacity to deliver equitable education of good quality – and coming up with different solutions for the future. These debates are more intense at compulsory education levels than at non-compulsory levels, often over questions of profit making and commercialization.

In **Bangladesh**, the political will to expand educational access by relying on non-state actors has ebbed and flowed over time. After independence from Pakistan in 1971, primary schools were nationalized and education was declared to be compulsory, secular and modernized. Throughout this period, an increase in girls' enrolment was supported by non-formal schools run by non-governmental associations (NGOs) (Hossain et al., 2019). Key education documents that have called for stronger public–private partnerships include the National Education Policy 2010, the government's five-year plans (of which the seventh plan for 2016–20 was the most recent) and the National Strategy for Accelerated Poverty Reduction. The country's first education act, still in draft, has emphasized giving the education ministry more authority to monitor non-governmental and private education institution activities, as well as coaching centres (Alamgir, 2021).

Another issue is that since the 1980s, including after the return to multiparty democracy in 1991, the government has used public funds to expand Islamic education, although it remains under-resourced compared with government schools. But the development of a faith-based education system with two streams, one assisted and the other neither assisted nor overseen by the state, complicates the division between state and non-state actors so much that the system is not challenged (BRAC, 2022).

In **India**, the Constitution requires the state to provide free and compulsory education and to secure the right to education. Schools are expected to register as non-profit institutions. Three major civil society networks – the Right to Education Forum, the Campaign Against Child Labour and the Alliance for the Right to Early Childhood Development – have campaigned for the right to education of good quality from birth to age 18 (Right to Education Forum et al., 2018). Some advocates, more supportive of profit making in education, argue that civil society and private actors can provide more innovative and cost-efficient services, improve learning outcomes and satisfy parental demands better than government (Narang, 2019). The National Education Policy 2020 has been a focus of debates on such issues (**Box 1.2**). Some critics argue that it does not recognize education as a public good, pushes for private activity and places confidence in communities, volunteerism and philanthropy, implicitly ignoring the need to target the most marginalized (Bhatty, 2020). Others argue that the policy has helped level the playing field for private schools but does not go far enough in abolishing fee regulations (Agarwal and Narang, 2021).

As a result of India's federal system, education reforms require collaborative efforts of state, district and block officials, making it more difficult for national political parties to have explicit education messaging in their campaigns. Nevertheless, the manifestos of national political parties for the 2019 national parliamentary elections showed that they positioned themselves either as advocating for public provision at all levels of education, with the private sector playing only a supplementary role, or as not making such a distinction. By contrast, some political parties at state/territory level, as in Delhi and Haryana, have campaigned in the past decade with an education focus aiming to improve critical levers of the public education system, such as infrastructure, financing and teacher training (Goel, 2020; Sahoo, 2019).

One factor shaping trust in government actions in education is how political actors engage with private education. A factor that undermines public trust is politician ownership of education institutions, as it can lead to citizens believing that government officials may not uphold support for publicly provided and managed education. It has been claimed that some Indian politicians have used their positions to establish private education institutions or become members of school or college boards, often circumventing regulatory procedures (Centre for Policy Research, 2022).

Political incentives have also shaped how politicians interact with education policy. Analysis of electoral data over 30 years has shown that education was more likely to expand in constituencies where elections were more

BOX 1.2:

India's National Education Policy 2020 facilitates private engagement in education

India's National Education Policy 2020 was the last in a series of documents that increasingly sought to shift from a dominant central 'government' role in education to a focus on 'governance' to facilitate private engagement in education. The midterm appraisal of the 11th Five Year Plan (2007–12) called for easing entry barriers and revisiting norms for schools, such as land requirements, as key elements of a reform agenda (Planning Commission, 2011). The Kasturirangan Committee in 2019 pointed out that to ease entry for schools and encourage alternative models of education, the 2009 Right to Education Act requirements for schools would need to be made 'substantially less restrictive'.

The National Education Policy 2020 recognizes an 'overemphasis on inputs and the mechanistic nature of their specifications – physical and infrastructural' and proposes making these requirements 'more responsive to realities on the ground … leaving suitable flexibility for each school to make its own decisions based on local needs and constraints'. The policy aims to shift focus to desired learning outcomes, limiting input regulations to child safety, access and inclusion, the non-profit nature of schools, and minimum standards (Centre for Civil Society, 2022).

Philanthropic involvement in education has also shifted, reflecting changes in the nexus between business, politics and education after economic liberalization in the 1990s. Five Year Plans have included actions and language making public–private partnerships acceptable. The 12th plan (2012–17) created a Working Group on Private Sector Participation and Public Private Partnership in School Education (Centre for Policy Research, 2022). With the diminishing role of the state in education financing, regulation and management, private players are moving from provision of school services to that of supplementary services and managerial expertise and helping set the policy agenda.

This shift is happening despite the fact that the Constitution clearly positions non-state actors as subordinate to the state in the interest of a larger public purpose (Centre for Policy Research, 2022). Some see the efficiency agenda and the outcomes approach championed by non-state actors as a move away from core state functions. Criticism of the National Education Policy 2020 has focused on its silence with respect to the 2009 Right to Education Act and its relation to Article 21A, which sought to make education free and compulsory. Some consider that the policy conceives students and parents to be consumers and education a private good (SAAPE, 2019).

competitive. Interviews with local politicians in Haryana, Kerala and Madhya Pradesh states in 2020 and 2021 revealed that they viewed private schools as more flexible and expedient and felt they could more directly engage with them to facilitate rapid education expansion, bypassing public education bureaucracies. Politicians becoming private education entrepreneurs has been viewed as a stepping stone to community prominence and a signal of interest in social service (Read, 2022). But the growing political importance of education in India could result in a stronger focus on quick fixes to show results, which are more easily achieved through non-state participation (Centre for Policy Research, 2022).

In the **Islamic Republic of Iran**, the Fundamental Reform Document of Education, adopted in 2011, reaffirmed the political character of education. While it recognized the participation of non-state actors in state education system development strategies, it posed strict conditions. Nevertheless, establishment and ownership of private institutions by key political actors has blurred the lines between state and non-state actors (Paivandi, 2022).

In **Nepal**, there has been a gradual acceptance of the role and contribution of the private sector in education among the major political parties (Bhatta and Pherali, 2017). In the 1990s, left-leaning parties vehemently opposed private schools, even calling for them to be closed. However, nationalizing schools became a complex issue, so these parties began to view private schooling growth as an undesirable but pragmatic solution to the country's resource constraints. More right-leaning parties have pointed at education disparity and quality issues but have insisted on the importance of private initiatives.

The Constitution and public policies have progressively taken the view that access to education is a fundamental right. In the School Sector Development Plan 2016/17–2022/23, public–private partnerships are encouraged in secondary and tertiary education to reach vulnerable populations. The 2016 Eighth Amendment to Nepal's Education Act removes the provision that a new school may be established under the Company Act, creating a policy environment where existing for-profit institutions could continue to operate, but preventing new ones from emerging. The National Education

Policy 2019 highlights the challenges of having a profit-oriented rather than service-oriented education system, emphasizing the need to ensure the latter. The High-Level National Education Commission Report, also issued in 2019, was more specific in recommending that all current institutional (private) schools be steadily converted to non-profit schools within a decade; a stand against profit making was taken but not against non-state schools. However, some private actors have actively resisted, which means the commission report has not been officially released by the government (Institute of Integrated Development Studies, 2022).

As in India and the Islamic Republic of Iran, anecdotal reports suggest that influential government officials increasingly have a stake in or are on the board of private schools. This may imply a lack of political will not just to implement regulations but also to improve public education, despite public pronouncements to the contrary (Institute of Integrated Development Studies, 2022).

In **Pakistan**, political regimes have had a strong role in the development of the education system (Saleem, 2020). The National Education Policy 2017–25 encourages private-sector involvement in education. At the provincial level, both the Punjab Education Sector Plan (2019/20–2023/24) and the School Education Sector Plan and Roadmap for Sindh (2019–24) view public–private partnerships as important for expanding access to education. Punjab and Sindh are expected to increase and strengthen public–private partnership modalities. Similarly, the 2002 Higher Education Commission Ordinance strongly encouraged non-state sector participation in tertiary education to cope with the major demand for it.

In **Sri Lanka**, the government has traditionally seen itself as the sole provider of education. It has considered schools catering to children aged 5 to 14 registered as business organizations under the supervision of the Registrar of Companies or Board of Investment schools as illegal. More recent policy documents indicate a change in perceptions towards the non-state sector. Objectives under Proposals for a National Policy on General Education in Sri Lanka 2016, Reimagining Education in Sri Lanka 2020 and the Sri Lanka General Education Sector Development Plan 2020–25 recognize the need for these schools to be regulated and monitored at the national and provincial government levels.

SOME VIEW PROFIT MAKING IN EDUCATION WITH SCEPTICISM

Opposition to commercialization comes from many civil society organizations. In 2019, 57 human rights, academic and advocacy experts, including experts from Bangladesh, India and Nepal, formulated 10 'guiding principles on the human rights obligations of States to provide public education and to regulate private involvement in education', known as the Abidjan Principles (Skelton et al., 2019). While the Abidjan Principles gave a global voice to the right to education movement, several campaigns lobby for these principles at the national level. The All India Forum for Right to Education campaigns against increasing commercialization and the promotion of public–private partnerships models, highlighting challenges entailed by a bigger role for private schools (RTE Forum, 2020). Oxfam India has mapped private school regulatory frameworks, offering an analytical commentary on policy developments (Mehendale, 2020).

In India's West Bengal state, a draft policy on public–private partnership model schools was issued in February 2021, outlining a request for proposals from private players to run and operate institutions on infrastructure provided by the government. The proposal was greeted with fierce opposition, with the All Bengal Teachers Associations calling for a protest rally, arguing that the proposal would lead to the privatization and corporatization of schools (Bharat Times, 2022).

The National Campaign for Education Nepal, a national network of 433 members founded as the national chapter of the Global Campaign for Education, focuses on strengthening public education systems. Its advocacy activities include events to protest against privatization, demand monitoring of private schools and call for adequate public education financing (National Campaign for Education Nepal, 2017).

In Sri Lanka, the government granted degree-awarding status to the South Asian Institute of Technology and Medicine (SAITM) but faced strong opposition from the Inter University Students' Federation (IUSF) and the Government Medical Officers' Association, which noted that the benchmark for admission to SAITM was lower than that of public universities. In 2016, the Sri Lanka Medical Council refused to register the first cohort of SAITM graduates, claiming they had inadequate clinical and academic training. The following year, a court instructed the council to register the

graduates. Ultimately, the government abolished SAITM, suspending enrolment and transferring students to a military institution (Institute of Policy Studies, 2022). More recently, the IUSF demanded the withdrawal of a government proposal to allow the establishment of international branch campuses in Nepal, claiming the government was again trying to privatize education (De Alwis, 2020).

While students have repeatedly protested price hikes, nearly all countries today support higher education through a combination of state and non-state means, and few would argue that higher education is an entirely public or private good that should be exclusively provided and financed by one or the other (Altbach et al., 2021). The debate regarding the role of non-state actors in higher education is thus mostly one of degree. Although hesitancy about profit maximization and the privatization of education are more present in the tertiary sector, lack of capacity and funding in the public sector has forced most to welcome the participation of non-state actors. Today, policy frameworks in the region tend to hold friendly or neutral views towards the participation of non-state actors in tertiary education. In Bhutan, the target is to double non-state institutions and increase their share of enrolment (Schofield and Roder, 2022).

At the same time, non-state tertiary institutions try hard to protect their market. In Afghanistan, after the Ministry of Education banned six universities in 2018, the private universities association formed a commission with the parliament and the second vice president to examine the case and found that the universities met the minimum conditions required. The non-state sector also lobbied policymakers to amend the strict regulations put in place with the 2019 Private Higher Education Institution Regulation (Hatsaandh, 2022).

The Association of Private Universities of Bangladesh has spoken against the government's approval of an Australian study centre, claiming that the operation of for-profit centres would be unfair competition and would violate the Private University Act, which states that non-state universities must not operate for profit (Wadud, 2021a). The association has also been vocal against government proposals to impose a 15% tax on the income of non-state universities (Wadud, 2021b).

NON-STATE ACTORS HAVE PUSHED FOR EARLY CHILDHOOD, TECHNICAL, VOCATIONAL AND ADULT EDUCATION

Non-state actors have been instrumental in the expansion of early childhood, technical, vocational and adult education services through direct provision, funding support, capacity development, research and advocacy. Early childhood education provision is dominated by non-state providers; governments have accepted engaging with them to develop service provision in collaborative ways, focusing on improving synergies to help mainstream early childhood education. In Afghanistan, the Aga Khan Foundation established 70 preschool centres between 2009 to 2013 as part of its Girls' Education Support Programme and subsequently, with foreign donor support, established and sustained 213 government and community-based preschool centres in remote locations (Hatsaandh, 2022).

The Bangladesh Early Childhood Development Network, a partnership of 172 members from government, NGOs and international organizations, was established in 2005 for advocacy and stronger cooperation through information sharing, technical guidance and capacity building (Zahar and Khondker, 2017). Its advocacy led to a working group being set up by the Ministry of Primary and Mass Education to prepare an Operational Framework of Pre-Primary Education, which defined the developmental and educational support children need between ages 3 and 6, emphasizing learning through play and taking the first steps towards literacy and numeracy.

In Bhutan, Save the Children, an international NGO, has worked closely with the education and health ministries to develop quality monitoring tools for early childhood centres and build capacity among district education officers. In Nepal, national non-profit organizations, such as Seto Gurans National Child Development Services, have aimed to develop human resources and provide technical support to organizations operating in early childhood (Institute of Integrated Development Studies, 2022). In Pakistan, the research organization ITA has embedded early childhood education in its flagship programme, the ASER citizen-led assessments, to raise the profile of early childhood education and produce high-quality data. ITA has also led large-scale research studies on early childhood education across the Punjab region.

In technical and vocational education and training (TVET), partnering with the private sector has become a policy priority to expand capacity. The Sri Lanka National Skills Development Plan 2014–20 aimed to double training

participation rates and supply. India's 12th Five Year Plan for 2012–17 aimed for 400 million workers to obtain skills by 2022. Punjab province in Pakistan aspired to prepare 2 million people for work by 2018. These approaches acknowledge the key role of non-state actors and explicitly rely on their increasing engagement to achieve ambitious training targets (Béteille et al., 2020). As a result, more complex forms of cooperation have emerged to attract private-sector engagement in a market that is seen as involving high financial risk and limited returns (Nambiar, 2022). In TVET, public–private partnerships have been developed to expand access, facilitate private engagement and encourage resource mobilization.

Core objectives of Pakistan's TVET Sector Support Programme include increasing private-sector participation in decisions on vocational education and strengthening employers' role in TVET institution management. Some provinces were more receptive than others to participating. The Technical Education and Vocational Training Authority of Khyber Pakhtunkhwa signed multiple memoranda of understanding with local companies and engaged with industry associations, while Punjab did the same with a diverse range of non-state organizations operating in key industry sectors, such as transport, trade, and information and communication technology (ITA, 2022).

Non-state actors are a driving force in adult learning and education in South Asia. In some contexts, they have had a pioneering role. The Afghan National Association for Adult Education promoted the Accelerated Learning Programme to allow youth and adults, notably women, to complete primary education and obtain a formal qualification issued by the state. The initiative aimed to bridge non-formal education and adult literacy with formal provision (Hanemann, 2021). Bangladeshi NGOs led by BRAC were responsible for introducing non-formal second-chance primary education programmes in the 1980s that were later scaled up nationwide (BRAC, 2022). Proven NGO-based provision models have been endorsed and replicated by the government's Bureau of Non-formal Education.

In the same period, Bhutan's National Women's Association launched a basic literacy project. The state drew on the initiative to fund a literacy programme in Dzongkha, targeted at youth and adults who had not completed compulsory education. Managed by the education ministry, it has since become the flagship programme (Schofield and Roder, 2022). The Islamic Republic of Iran has outsourced most of its adult education provision to NGOs (UIL, 2019).

In Nepal, community-based organizations were key to raising awareness of literacy development and to targeting activities at community needs within the National Literacy Campaign and Literate Mission. NGOs contributed to the mission's objectives with by implementing their own programmes (Nepal Ministry of Education Non-Formal Education Centre, 2017). Pakistan set up a public–private partnership to provide non-formal basic education. Established in 2002, the National Commission for Human Development is a non-profit organization managing Functional Literacy Centres and providing basic and health education. The public–private partnership raises funds from the private sector, philanthropists, international donor agencies, volunteers and the government (Hanemann, 2021).

Faith-based institutions have traditionally been involved in adult literacy. In Afghanistan, many mosque educators provide literacy courses as part of religious education. They benefit from strong support by local communities. Their activities are neither monitored nor financed by the state (Robinson-Pant et al., 2021).

NON-STATE ACTORS HAVE EMPHASIZED INCLUSION AND ACCOUNTABILITY

There are several other prominent home-grown non-state efforts in education in the region. Civil society platforms have been key in pushing for better education governance and ensuring that governments commit to education and are held accountable. In Bangladesh, civil society advocates have developed an agenda for improved governance that lists needs for resources, decentralized management, new thinking about teachers and the workforce, and specific improvements for early childhood, skills development, non-formal education and lifelong learning (BRAC, 2022).

Major movements for accountability have been launched in South Asia and gone on to influence global trends. In India, Pratham, an NGO, initiated ASER in 2005, which has become the world's largest citizen-led assessment and drawn attention to questions of quality and accountability in education. It has also been linked to quality-enhancing community-based actions (Banerji, 2021). Pratham's approach to scaling up cost-effective models for improving education routinely includes government and supports the public education system. ASER research and data have been used as major advocacy tools in parliamentary discussions and quoted by government sources. They also had a major influence over the inclusion in the 2020 National Education Policy of a reference to foundational literacy and numeracy as

an 'urgent and necessary prerequisite' to learning (India Ministry of Human Resource Development, 2020).

Facilitating and advocating for inclusion of girls and women has been another key role for many non-state actors. Culture, religion and politics can limit their education opportunities, but single-sex tertiary institutions have helped improve women's engagement and leadership development. The founding of Indian Women's University, now SNDT Women's University, in 1916 began a slow movement towards the opening of stand-alone women's colleges, women's colleges affiliated with co-educational universities (e.g. Lady Shri Ram College for Women and the University of Delhi) and independent women's universities. Some women's colleges and universities have been started specifically to educate women in science, technology, engineering and mathematics, including Dr. APJ Abdul Kalam Women's Institute of Technology (Darbhanga), Women Institute of Technology (Dehradun) and Indira Gandhi Delhi Technical University for Women (Delhi). Government and private institutions now make up the world's largest single-sex education sector, with over 4,500 institutions, including a third of the country's vocational colleges (India Today, 2016).

THE SOUTH ASIA REGIONAL REPORT RESEARCH AND PARTNERSHIP

Considering the wealth of evidence on South Asia, as reflected in recent institutional reports by UNICEF (Borkowski et al., 2021) and the World Bank (Béteille et al., 2020), two characteristics distinguish this regional report. First, building on the 2021/2 *Global Education Monitoring Report*, this report looks at non-state activity in education with a perspective that education systems need to achieve equity and inclusion (UNESCO, 2021). Second, it draws extensively on data collection and expert analysis from collaboration with several institutional and individual partners in the region. The report has tried to integrate multiple perspectives on the roles and contributions of non-state actors in education.

For all countries except India, **country studies** analysed issues of provision, regulation, finance and influence, covering all levels of education to the extent possible. All country studies included brief research reviews, analysis of policy and legislative documents, descriptive analysis using secondary data sets or reports, and state and non-state stakeholder perspectives through interviews or surveys.

Five **thematic studies** were also developed. Four focused primarily on India: on low-fee private schools; regulation of school education and supplementary tuition; public–private partnerships in skills development; and teacher education (which also covered Afghanistan and Nepal). One study focused on ancillary services in Pakistan.

The regional report partners interviewed and engaged with a diverse set of national and local actors at various levels of education, focusing particularly on education providers, government officials, experts and academics, teachers, parents, students, and other non-state actors (**Table 1.2**). Collectively, the partners conducted over 450 interviews and 4 focus group discussions for their research. Surveys on perceptions of desired roles of non-state actors in education were collected from

TABLE 1.2
Types of non-state actors engaged by partners in the preparation of this report

Actors	
Government officials	National and local officials
Teachers	Public and private school teachers; teacher trainees
Other non-state actors	Foundations; business leaders; civil society organizations; religious authorities
Parents and students	
Experts and academics	
Providers	
Direct services	Early childhood education centres; primary and secondary schools: founders and administrators, budget private schools and franchise school owners, not-for-profit foundations, private school associations; tertiary institutions; TVET institutions
Ancillary services	Tutoring centres and tutors; teacher training institutions; language training centres; school meal providers; technology and mobile phone firms

some 250 state and non-state respondents. In Pakistan, 720 students of 36 state and non-state schools in 3 provinces were assessed to include primary learning outcome data comparing public and private schools. In India, over 1,000 budget private school proprietors were surveyed to understand their characteristics and their relationship with the regulatory system in which they operate. Over 500 teachers and individuals involved in teacher training institutions in India were surveyed to understand their views of their experiences of professional development and needs.

The report discusses various dimensions of non-state activity in education. Chapter 2 maps types of education service **provision** at various levels of education. It describes why non-state actors have come to play such a wide range of roles in South Asia, looking at both aspirations and government capacity. The chapter then discusses key ancillary services, such as private tutoring, textbooks, technology and support services, to highlight the scale and scope of their involvement.

Chapter 3 reviews the evidence on the **impact** of non-state activity, with reference to equity, quality and innovation, at individual and system level, highlighting trends.

Chapter 4 provides an overview of **governance and regulation** before describing implementation issues and the challenges encountered when education does not fall under government oversight. It documents provider perspectives on how they experience the government's regulatory reach.

Chapter 5 describes **financing**, highlighting the inadequacy of public funding, the role of donors and philanthropies, and the significant contributions of households.

Chapter 6 concludes with **recommendations**, adapting those of the global report to the South Asia context. It describes critical factors for the future, including collaboration with non-state actors and the need for more trust in government, which will require efforts to develop capacity for governance, regulation and financing.

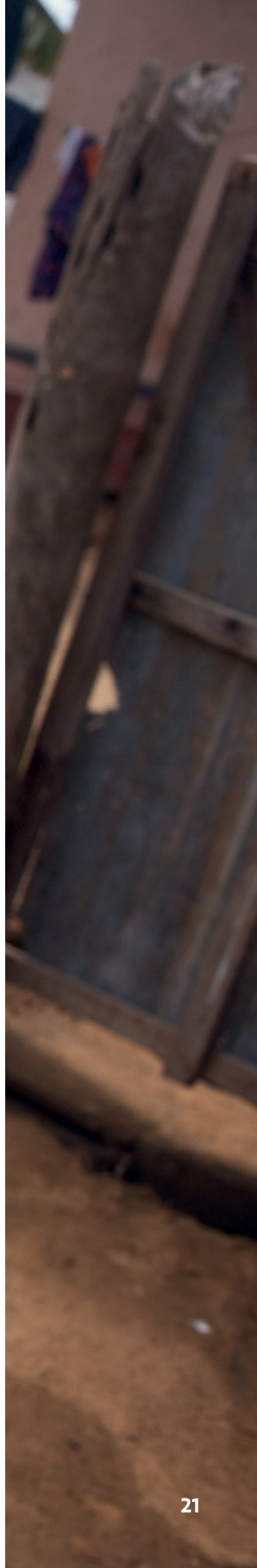
Ten-year-old Ramya, left, and a classmate walk home after school in the Tamil settlement of Sangamam Gramam in the eastern Ampara District, Sri Lanka.

CREDIT: UNICEF/Pietrasik

CHAPTER

2

Provision



KEY MESSAGES

- Parental aspirations have largely driven recent growth in enrolment in private, especially unaided, institutions. A survey found that 73% of parents in India chose private schools because public schools did not meet quality standards, 12% because they offered English-medium education and 10% because public schools were not available.
- Faith-based education provision aims to preserve cultural and religious values. In Pakistan, 4.1 million students in 2017/18 studied in more than 31,000 religious schools, representing 8% of overall enrolment.
- Early childhood care and education provision is dominated by non-state providers. The private sector is often the main provider at this level in many countries, accounting for 93% in the Islamic Republic of Iran and 71% in Sri Lanka.
- Non-state provision in tertiary education has expanded in India and Pakistan due to a marked policy shift in the 1980s away from the post-independence strategy of expanding higher education through public institutions.
- Expansion of participation in technical and vocational education and training in the region is driven by an increase in private for-profit provision and public–private partnerships. Institutions managed by non-state actors in this sector doubled from 3,000 to more than 6,000 in Bangladesh between 2012 and 2019, while there are only some 900 state-managed institutions.
- Non-state actors are heavily involved in teacher education in the region. More than 90% of the 32,751 recognized pre-service teacher education institutions in India were privately funded and running on student fees in 2020.
- Private tutoring is highly prevalent, partly due to quality concerns but primarily because of the competitive formal education and employment landscape. In Sri Lanka, the percentage of households spending on private tutoring increased between 1995/96 and 2016 from 41% to 65% for urban households and from 19% to 62% for rural households.
- Large-scale textbook, tutoring and technology providers are blurring boundaries, aiming to be one-stop shops that provide both online and offline education. In Pakistan, a franchise model of tutoring is prevalent, with companies or academies running schools and tuition centres, and developing their own curriculum and textbooks.

There is wide diversity in non-state education provision 24
Non-state provision grew to satisfy demand for more, better and more appropriate education 25
Non-state provision has also expanded in non-compulsory education 31
Private tutoring is a prevalent and growing phenomenon in the region 36
Textbook provision varies for public and private institutions 38
Education technology providers have expanded rapidly 39
School meals are provided in partnership with a range of non-state actors 40
Conclusion 42

While South Asia has the world's largest share of enrolment in private institutions today, the history of state and non-state education in the region is complex. Politics has played a major role in the expansion and contraction of public education. Public education provision was once dominant. Non-state providers have moved in to fill gaps in provision. Governments have taken over, worked with or struggled to accommodate non-state education providers. Private institutions that receive little or no government assistance have expanded remarkably. Today's non-state education service providers defy easy categorization. Institutions may or may not be owned by the government, while their governance and financing lie on a continuum of forms. The boundaries are not always clear and relationships between the state and non-state providers vary according to type and function.

This chapter describes the diversity of non-state direct provision of schooling, including teacher education, and the reasons behind it. It then maps the landscape of ancillary services, including tutoring, textbook provision and education technology, and the types of institutions that engage in their provision.

Before introducing these different forms of non-state provision, it is important to recall that historically there have also been movements in the opposite direction, with governments taking over several education systems in the 1970s. The Bangladeshi government took over primary schools in 1974 to centralize education provision. In Maldives, the government first started bringing community schools under government regulation in the 1940s, transitioning from the 1980s onwards into a government-provided primary and secondary school system. In 2005, all community schools were given the opportunity to become fully fledged government schools; by 2019, community schools were just 5% of the total (Shougee and Shareef, 2022). In Nepal, the first major policy reform that sought to create a unified system of public education was initiated in 1971. The quest to increase central government responsibility was particularly significant in terms of teacher provisioning but also led to local interest groups losing influence in schooling (Joshi, 2014c). Pakistan nationalized 3,000 schools in the 1970s, allowing only a select few English-medium non-state schools to operate (ITA, 2022).

THERE IS WIDE DIVERSITY IN NON-STATE EDUCATION PROVISION

Non-state providers are diverse, with unique characteristics, enrolment shares and operation modes. Using administrative records and supporting information, this report classifies primary and secondary schools in each country based on financing, management and ownership, the last being the main criterion that helps distinguish between state and non-state schools (**Table 2.1**). In India and Pakistan, about 35% of students are enrolled in non-state, independent schools that do not receive any public funds (**Figure 2.1**). The complexity of institutional arrangements multiplies at other education levels.

TABLE 2.1

Typology of state and non-state primary and secondary schools in South Asia

	State-owned schools		Non-state-owned schools		
	State-managed and -funded	Non-state-managed or -funded	State-funded	Non-state-funded	Other schools
Afghanistan	State			Private, religious, community-based, home-based	Unregistered
Bangladesh	Government primary, newly nationalized primary, experimental	*Alia madrasas*, including primary *(ebtedayee)*; lower secondary *(dakhil)*; upper secondary *(alim)*	Registered non-government primary, community, Reaching Out-of-School Children project, *shishy kollyan*	Non-registered non-government primary, NGO	Unregistered *qawmi madrasas*
Bhutan	State	Autonomous, central residential	State monastic	Private, private international, private monastic	
India	Central and state government, railway, Kendriya Vidyalaya, Navodaya Vidyalaya, Tibetan, *madrasas*	Adopt-a-School	Government-aided state-funded *madrasas*	Private unaided	Unregistered or unrecognized private schools and *madrasas*
Iran, Isl. Rep.	Public, Nemoneh Mardomi		Semi-private	Private, including non-profit and international	Unlicensed
Maldives	State		For-profit private Community		
Nepal	Community, mobile for migratory communities	Community-managed, community teacher-aided and partially aided, community unaided	Religious – *madrasas* (Islamic), *gumbas* (Buddhist), *gurukuls* (Hindu)	Institutional – private trust, public trust, for-profit company; international	Unregistered institutional, unregistered *madrasas*, Buddhist and Hindu
Pakistan	State, Adopt-a-School (Sindh Education Foundation)	Public support programme (Punjab), EMO programme	Foundation Assisted Schools (Punjab); self-assisted, existing support, Middle and High School Programme (Sindh); New School Programme, Promoting Private Schools in Rural Sindh; School Support Programme (Islamabad Capital Territory); community – girls, model, Balochistan Education Foundation	Private (low-fee or elite), *deeni madaris*	Unregistered private
Sri Lanka	Provincial and national state, assisted	International NGO supported	Buddhist *(pirivenas)*, Islamic *(madrasas, ahadiyas)*, special	Private, international	Unregistered private, unregistered Islamic

Notes: The terms used are based on local usage. NGO = non-governmental organization, EMO = Education Management Organization.
Source: GEM Report team analysis based on the PEER country profiles on non-state actors in education.

NON-STATE PROVISION GREW TO SATISFY DEMAND FOR MORE, BETTER AND MORE APPROPRIATE EDUCATION

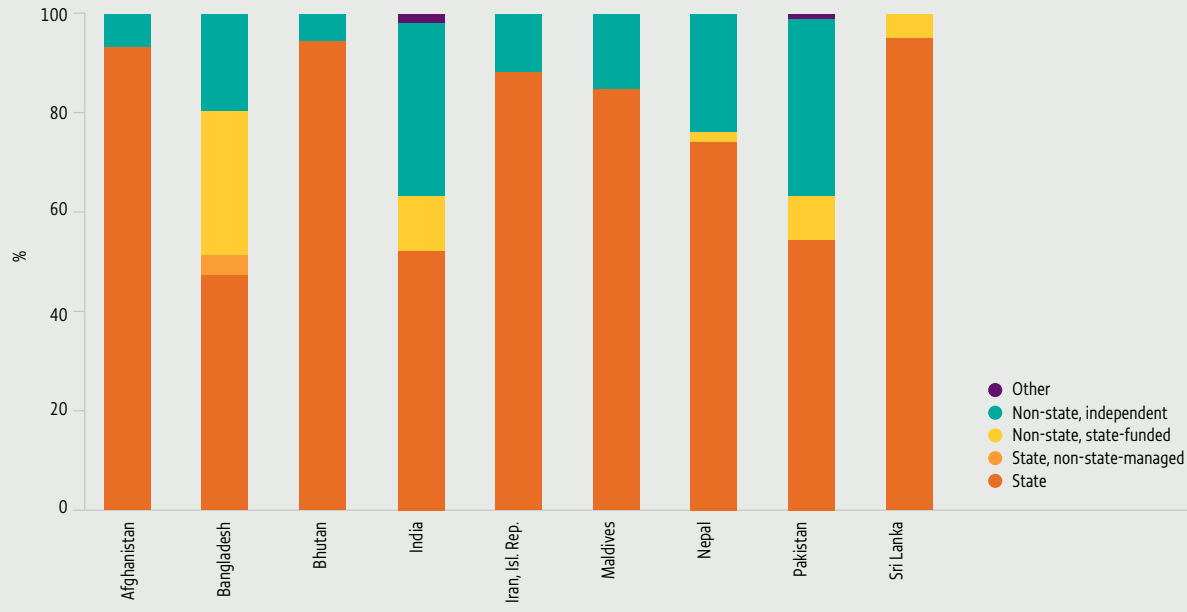
The variety of non-state education provision in South Asia has resulted from three main factors: household responses to the limited availability and low quality of public education, non-state actors' responses to crises, and historical circumstances related to religion and culture. All three have been affected by past and present political decisions to expand public education systems.

Aspirations have driven recent growth in private education provision

In recent years, private institutions have expanded substantially in many countries. In Bangladesh, most private school growth has happened at the primary level: 29,000 privately owned schools called kindergarten schools represent 22% of the total. According to the Kindergarten Unity Council, the number of privately run kindergarten schools was over 60,000 before the onset of the COVID-19 pandemic, which implies that a large share of these schools are not registered (BRAC, 2022). In India, 67,000 of the 97,000 schools established since 2014 have been private and unaided (**Figure 2.2**). In the Islamic Republic of Iran, the number of non-state elementary schools tripled from 3,400 to 10,100 between 2008 and 2018 (Paivandi, 2022).

At one end of the cost spectrum are low-fee private schools, a term used widely albeit without a clear definition. In India, several studies have highlighted

FIGURE 2.1:
India and Pakistan have the largest shares of private independent school enrolment
Share of enrolment by type of primary and secondary school, 2020 or latest available year



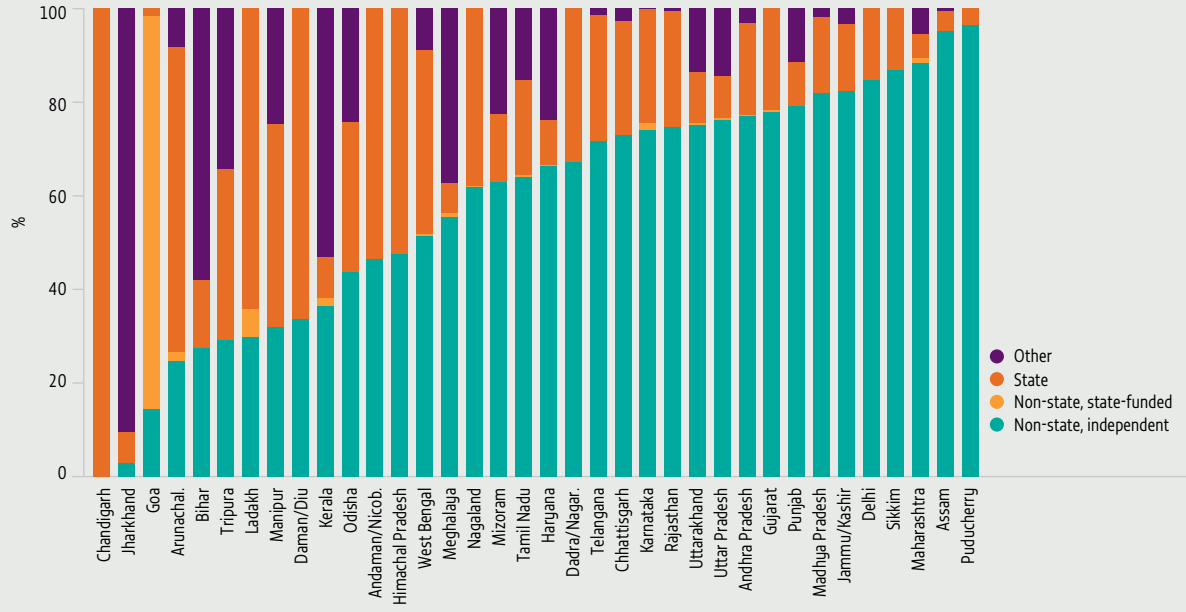
Sources: Ministry of Education (Afghanistan, 2019); BANBEIS (Bangladesh, 2020); Annual Education Statistics (Bhutan, 2020); UDISE (India, 2019/20), Flash Report (Nepal, 2019/20), Education Statistics (Pakistan, 2017/18); School Census (Sri Lanka, 2020); School Statistics (Maldives, 2019); Statistical Centre (Iran, Isl. Rep., 2020).

> In India and Pakistan, about 35% of students are enrolled in non-state, independent schools that do not receive any public funds

the marked growth of such budget schools, while defining them quite differently in their analyses: for instance, relating their fees to the minimum daily wage, per capita income or government per-pupil expenditure. Drawing from nationally representative data sets from the National Sample Survey, the Annual Status of Education Report and the District Information System for Education, one study found major growth in cheaper schools between 2010/11 and 2014/15. The median annual fee was about 10% of the annual minimum wage of daily wage labourers (and less than 4% in Uttar Pradesh). For 26% of rural students, the monthly fees were below the daily minimum wage (Kingdon, 2020). Nationally representative data from 2018 showed that 46% of private school students paid less than INR 500 a month in fees and 70% paid less than INR 1,000 a month (about US$15), suggesting that the majority of the large private schooling sector is low-fee (Central Square Foundation, 2020).

A survey of 1,052 recognized and unrecognized schools in five Indian states (Andhra Pradesh, Assam, Haryana, Jammu and Kashmir, and Telangana), conducted for this report and drawing from the 60,000 members of the National Independent Schools Alliance, found that most of the cheaper private schools surveyed were established in the early 2000s. The scale of these institutions was typically small: two thirds were established by individuals in the community and 80% of school owners had only one school in operation. While the bulk of the schools charged similar fees, there were many outliers; the widest fee range and the highest fees were observed in Telangana. The median monthly primary school charged INR 500 in Jammu and Kashmir, INR 750 in Haryana, INR 900 in Andhra Pradesh and INR 1,500 in Telangana. Fees were typically higher at higher levels of education. In Andhra Pradesh, the median preschool charged INR 700 while the median secondary school charged INR 1,600 (Centre for Civil Society, 2022) (**Figure 2.3**).

FIGURE 2.2:
Out of all new schools established in India, 7 in 10 are private independent schools
Share of new schools established, by type, states/union territories of India, 2014–19



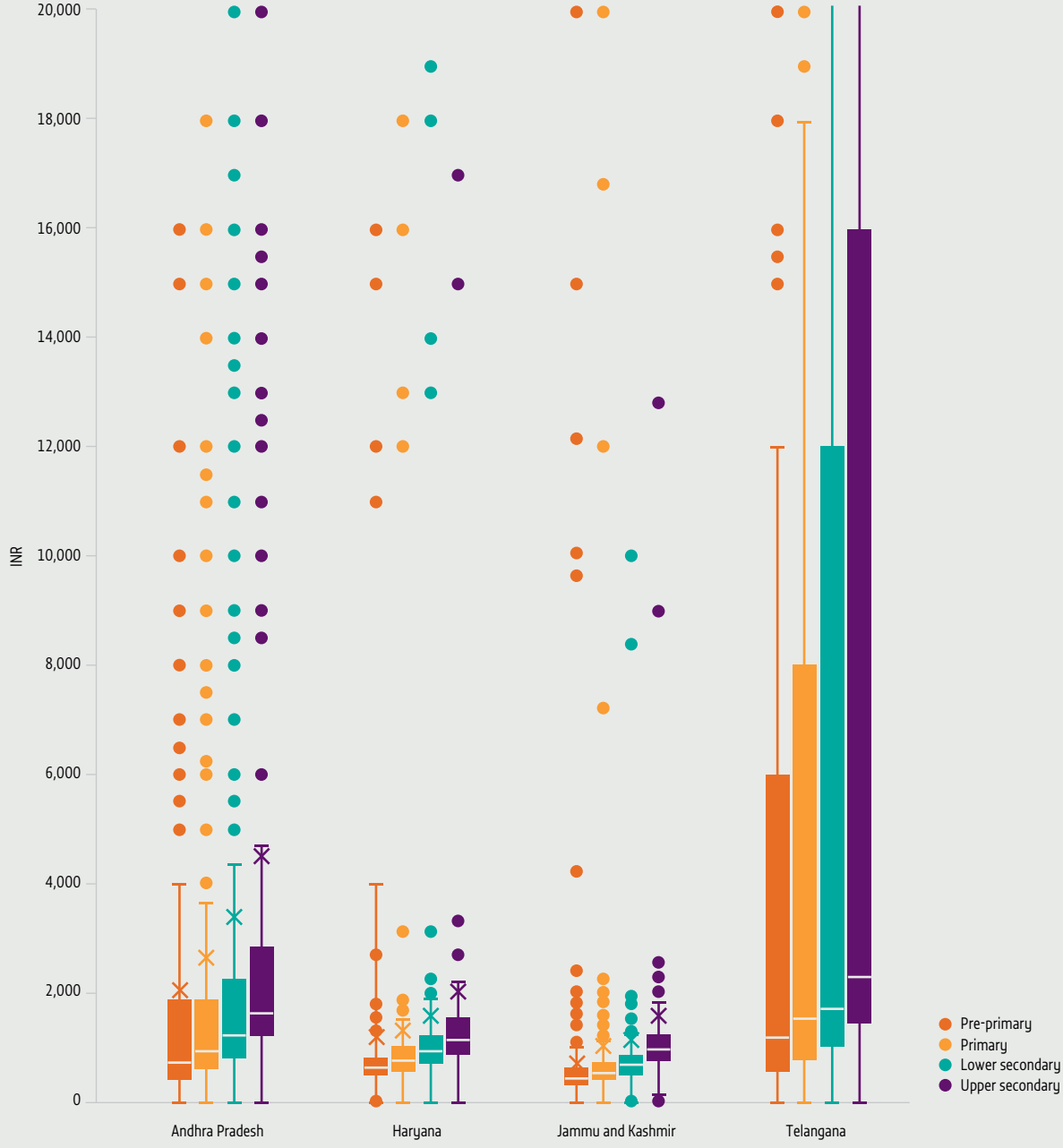
Source: Unified District Information System for Education Plus (UDISE+) 2019-20.

> In Bangladesh, most private school growth has happened at the primary level: 29,000 privately owned schools called kindergarten schools represent 22% of the total

FIGURE 2.3:

Fee ranges of private schools in India vary widely by state and grade

Monthly fees charged by private schools, by education level, selected states in India, 2021



Notes: The coloured bar represents the distribution of school fees from the 25th to the 75th percentile. For example, in Andhra Pradesh, the median primary school in the bottom half of the distribution charged INR 600, while the median school in the top half of the distribution charged INR 1,850. The x sign represents the mean fee charged. The lines show the minimum and maximum values, excluding outliers, which are shown with dots.

Source: Centre for Civil Society (2022).

> In 2014, a survey found that 73% of parents in India chose private schools because public schools did not meet quality standards

In Nepal, most private schools are registered as company schools and are mainly for profit (Bhatta and Pherali, 2017). In Pakistan, low-cost private schooling has flourished since the 1990s in both urban and rural areas. In the early 2000s, private schools charged fees ranging from US$3 to US$200 per month (Andrabi et al., 2008). Public–private partnerships – formal long-term commitments between the state and non-state actors – have become more common in education but the model followed in Pakistan is unique in its scale and comprehensiveness. It has gone through several stages since the grant-in-aid system was suspended in 1972. Foundations in all provinces target children of lower socioeconomic status. The largest, the Punjab Education Foundation, caters for over 2.1 million students, followed by the Sindh Education Foundation with 0.5 million students (ITA, 2022).

Unregistered schools are common. In Bangladesh, official records suggest over 360,000 students are enrolled in non-registered primary institutions. In India in 2020, there were about 29,600 unrecognized schools educating 3.8 million students. This may be an underestimate, given differences in the quality of record-keeping at the state level (Kingdon, 2020). An assessment of low-cost private schools in Pakistan in 2015 found that 18% of primary, 14% of lower secondary and 4% of upper secondary schools were unregistered. A survey indicated that two thirds of the 5,000 private schools in Rawalpindi city were not registered. According to the 2016/17 Private School Census, some 54,000 private schools offered pre-primary education in Punjab province under various categorizations, such as pre-nursery, nursery and prep. The majority of programmes operated as unregulated entities, without government supervision and oversight (ITA, 2022).

Quality, distance and status considerations determine parental choices. In 2014, a survey found that 73% of parents in India chose private schools because public schools did not meet quality standards, 12% because they sought English-medium education (**Box 2.1**) and 10% because public schools were not available (Central Square Foundation, 2020). Distance to school was important in poor neighbourhoods, where public schools were lacking and parents were concerned for their children's safety, for instance in Delhi (Mousumi and Kusakabe, 2019). Few studies include data that identify whether parents' choices are motivated by social status differences between public and private schools. In Nepal, public school parents were much more likely than private school parents to agree that parents chose private schools for social status reasons (Joshi, 2014b).

An analysis of the preferences of 4,400 parents from low-income households across eight cities in India found that over 86% of the children were enrolled in a budget private school or would expect to transition to one in grade 1. The main choice criteria included English-medium instruction, schools' ability to provide classes beyond pre-primary, proximity to home, and education quality proxies such as school reputation (Irfan et al., 2017). A longitudinal study of 14,000 children aged 4 to 8 living in rural areas of Assam, Rajasthan and Telangana states found that parents perceived private preschools as better than public ones, although they acknowledged that teachers at *anganwadis* – rural government childcare centres – were better trained (Kaul et al., 2017).

At the other end of the fee spectrum, some schools cater for the elite, part of a growing global trend: The number of schools that provide international curricula and use English as a medium of instruction increased from 2,600 in 2000 to 11,600 in 2020 (ISC Research, 2020). In India, the number of international schools grew by 45% between 2013 and 2018 and enrolment by 70% (Cook, 2018). In Pakistan, the government subsidizes elite schools with capital and by reducing the amount required for duties (Khattak, 2014). In Sri Lanka, enrolment in international schools outside of Ministry of Education jurisdiction doubled between 2012 and 2019 (Institute of Policy Studies, 2022).

Franchising models have developed to cash in on established brands and expand. In Pakistan, the Beaconhouse Group evolved from a single private school in Lahore to more than 750 establishments in Pakistan and in eight other countries. Its division The Educators has over 200,000 students from pre-primary to secondary in more than 600 schools across 200 towns and cities in Pakistan. It has become one of the world's largest private school networks and has moved into other education services (Malik and Hussain, 2022).

BOX 2.1:

The use of English as the medium of instruction in private schools is viewed as a passport to privilege in South Asia

English functions as a symbol of class in the region due to a long colonial history and globalization. It also serves as a major linking language across peoples from diverse linguistic backgrounds. English-medium schools have been a way to maintain an elite system, perpetuating class structures in India (Nambissan, 2021), Nepal (Khanal and Kapilvastu, 2020), Pakistan (Haidar, 2017; Rahman, 2005) and Sri Lanka.

Throughout the colonial period, elite populations in India were products of expensive English-medium schools. Even in the 1970s, the majority of recruits of the prestigious Indian Administrative Service had attended English-medium schools. In the 1990s, the middle class began shifting in large numbers from public to private institutions, which proliferated especially due to the use of English-medium education and the downsizing of the public sector with liberalization policies (Nambissan, 2009). Parents value English because they perceive it as boosting their children's advantage in labour market competition.

Language of instruction is contentious in Sri Lanka. A 1998 education reform emphasized English education, but scholars and activists objected to this, citing a need to preserve Sinhala and Tamil. Ironically, resistance to English limits English usage and proficiency to the select few who attend elite schools (Institute of Policy Studies, 2022). A key driving force behind the choice of international schools, besides access to education technology, international curriculum and flexibility, is the use of English and how it enhances future prospects (Wettewa, 2015).

Evidence of language discrimination in high-stakes examinations in India suggests real consequences for not going to English-medium institutions. While there is a choice of language, question papers for some high-stakes examinations, including for the civil service and university admission, seem to be initially drafted in English, then poorly translated into other languages, putting non-English-speaking candidates at a disadvantage (Khan, 2021). Over time, fewer candidates have been taking the examinations in national languages. It is estimated that only 40 candidates who took the Indian civil service examination in 2018/19 wrote in Indian languages, of whom 17 chose Hindi (Khan, 2021). In 2019, Jawaharlal Nehru University, one of the only top-tier universities that still allowed students to take the admissions test in Hindi, changed the admissions test to English only (Jangid, 2019). The dominance of English usage means that members of disadvantaged social groups, such as Dalit and Madhesi communities in Nepal and scheduled caste and tribe members in India, are under-represented among successful candidates as they are likely to attend public schools (Sunam and Shrestha, 2019).

In Sri Lanka, networks of international schools, such as Lyceum, have highly competitive admissions, teach an international curriculum and expect students to study at higher education institutions abroad. A study conducted in four international schools in Sri Lanka showed that, in addition to English language and fluency, foreign curricula and certification mattered to parents. They also perceived access to education technology and online resources as beneficial. International schools offered flexibility in subject choices and parents said they thought their children's education, general knowledge and social skills were markedly better than those of their public school counterparts (Wettewa, 2015). But a major concern is their use of foreign curricula, which produces a generation of Sri Lankans with knowledge about the outside world but little awareness of Sri Lankan history, culture and geography (Wettewa, 2016; Wettewa and Bagnall, 2017).

In Nepal, too, private schools which began as individual institutions have gradually merged into chain or network schools, such as the Little Angels' School system or the 11-institution Kathmandu Model College network, which has secondary, higher secondary and post-secondary programmes (Bhatta and Pherali, 2017). The Chaudhary Group of Schools, established in 2006/07, partnered with the India-based Manipal Group in 2009 and acquired schools that were operating as Campion schools. In the third year of the partnership, the Manipal primary and secondary school component was acquired by the London-based Pearson Group. When this partnership was terminated, the Campion schools

> "Globally, the number of schools that provide international curricula and use English as a medium of instruction increased from 2,600 in 2000 to 11,600 in 2020"

and the Chandbagh School came under CG Education management (Bhatta and Pherali, 2017). The Samata Foundation has 80 low-fee schools that charge less than US$1 per month and educate some 60,000 students. The fees cover only 25% of total expenses, with national and international donors contributing the rest (Institute of Integrated Development Studies, 2022).

Non-state providers have stepped in to support education in periods of crisis

Crisis periods can provide a role for non-state actors in education in certain contexts, as shown by two large, non-formal education systems that sprang up during crises and later were gradually mainstreamed. In Afghanistan, after the end of the first Taliban regime in 2001, a community-based education system grew in response to major barriers to access for girls and for children in remote areas. The system expanded with significant international support. By 2015, it enrolled 334,000 or 5% of all primary education students, thanks to further support from local government, communities and NGOs. In 2018, a policy was developed to formalize the system: The National Education Strategic Plan 2017–21 envisaged expanding the system in the short term before scaling it down by 2030 (Afghanistan Ministry of Education, 2016; Bakshi, 2020).

In Bangladesh, just as the government was nationalizing schools in the early 1970s, several NGOs began work in rural areas to address the consequences of the 1970 cyclone and 1971 liberation war; this work included non-formal education programmes. By the early 2000s, these NGOs reached 1.5 million, or 9% of all primary education students. About 70% of those attending NGO schools were girls (CAMPE, 2005). The system was gradually formalized, with NGO school students participating in primary education graduation examinations from the early 2010s, enabling them to transition to formal secondary education. In 2014, the government brought 30,000 schools fully under its control (BRAC, 2022). By 2018, the system had contracted to 674,000 students, which represented less than 4% of total enrolment (Bangladesh Directorate of Primary Education, 2019).

Faith-based institutions help preserve cultural and religious values

In South Asia, much like in the rest of the world, faith-based education formed the historical basis of learning (Kumar, 2020). Vidya Bharati, which operates over 12,000 schools in India, is one of the world's largest private school networks. It emphasizes Hindu identity and retains strong ties with the Bharatiya Janata Party (Bhatty and Sundar, 2020). Muslim-majority countries continue to support and promote faith-based schools. In Bangladesh, formal *aliya madrasas* include hybrid religious and secular education, encouraged by a state subsidy, while *qawmi madrasas* are non-formal and usually mosque-based (Roy et al., 2020). In Pakistan, 4.1 million students in 2017/18 were studying in more than 31,000 *deeni madaris* (religious schools), representing 8% of overall enrolment (Pakistan NEMIS and AEPAM, 2021). However, the exact number of these privately operated schools is difficult to ascertain due to the lack of a sufficiently rigorous registration process (ITA, 2022).

Religious school choice is linked to income, access to other options, parental education and religious motivations. Analysis of school choice in 12 districts of rural Bangladesh found that *madrasa* enrolment fell as household income increased, and that more religious households were more likely to send their children to *madrasas* (Asadullah et al., 2015; Asadullah and Chaudhury, 2016). In Pakistan, parents with fewer years of formal schooling were more likely to enrol their children in *madrasas* than in other private schools (Siddiqui, 2017). *Madrasas* provide boarding, food, textbooks, clothing and other necessities (Anjum, 2017).

Many religious education institutions are unregistered; they are often unwilling to follow government auditing and curriculum requirements. In India, an estimated 4,139 unrecognized *madrasas* educate over 500,000 students. In Nepal, there is a prevalence of unregistered *madrasas* and Buddhist and Hindu schools. Up to 3,000 *madrasas* may be operating unregistered while about 1,000 are registered (Rajbanshi, 2019; Taylor, 2021). In Bangladesh, non-state, independent *madrasas* are often unregistered. Sri Lanka has an estimated

> "In Afghanistan, after the end of the first Taliban regime in 2001, a community-based education system grew in response to major barriers to access for girls and for children in remote areas"

> In Pakistan, 4.1 million students in 2017/18 were studying in more than 31,000 *deeni madaris*

1,000+ *madrasas* that are not registered with the government and face threats of closure.

In Bhutan, by contrast, faith-based schools are on the decline. Roughly 5% of the student population in Bhutan consists of Buddhist monks, a remnant of the dominant form of monastic education in the 16th and 17th centuries. The government funds some monasteries and the Central Monastic Body receives a per-student monthly subsidy to cover the monks' living and other costs. Private monasteries also educate some monks but there are no reliable statistics on the scale of these institutions. Recent modifications to the monastic curriculum have included the addition of English and new curriculum plans developed by the Central Monastic Body in cooperation with UNICEF and the Ministry of Education. Unlike monks, nuns primarily study in institutions that are supported by private donations and local foundations, such as the Bhutan Nuns Foundation (Schofield and Roder, 2022).

NON-STATE PROVISION HAS ALSO EXPANDED IN NON-COMPULSORY EDUCATION

While South Asia stands out as having a particularly high share of enrolment in non-state primary and secondary education, such participation is also high at other levels of education, even if not always the highest in the world.

Early childhood provision has been dominated by non-state providers

Inadequate supply of services in early childhood care and education (ECCE) has led non-state actors to enter the sector to meet demand. In Bangladesh, just over half the children in pre-primary education attend various types of non-state institutions, including registered non-government schools, private kindergartens, NGO schools and private religious schools (Bhatta et al., 2020); the other half, about 47% of children, attend government primary schools offering pre-primary classes, which represented 59% of all institutions.

In the Islamic Republic of Iran, 93% of ECCE services are provided by the private sector or businesses, but even public kindergartens require some payment, which can be a barrier to entry for many parents (Sharifian, 2018). In Sri Lanka, private organizations or individuals provide 71% of ECCE services, including preschools, childcare or day-care centres, and integrated centres with both preschool and childcare facilities (Institute of Policy Studies, 2022).

NGOs also play an important role in promoting access to ECCE, especially for children from disadvantaged backgrounds. In Afghanistan, three types of ECCE exist: private centres in urban areas, NGO-organized pre-primary education, mostly in rural areas; and religious pre-primary education centres. The Robani Foundation, an NGO, has established mobile ECCE centres in collaboration with the government ECCE directorate. A driver and two female employees go to internally displaced populations' and returnees' camps and gather children for two to three hours. The government pays the mobile centres' operational costs (Hatsaandh, 2022).

In India, the NGO Pratham provides early childhood education programmes directly to families and also supports government programmes, such as *anganwadi* centres or preschool classes in government schools. In 2020/21, 492,000 children benefited from these services, of whom 92,000 participated in direct services, while the rest benefited through government partnerships (Pratham, 2022; Rao et al., 2021).

In Pakistan, the private sector is the largest provider of organized ECCE provision but the lack of public supply has also led several NGOs to provide ECCE services, particularly in rural areas (Khan, 2018). ITA, The Citizens Foundation and CARE Foundation have worked in 26,000 schools and provided services to over 250,000 children (Saeed and Bari, 2021). The Aga Khan Education Services offers four-year early childhood education programmes, combining two years of

> In the Islamic Republic of Iran, 93% of ECCE services are provided by the private sector or businesses

> In Nepal, early childhood education has one of the region's highest share of private institutions in total enrolment

pre-primary with grades 1 and 2 to ensure readiness for learning (Khan, 2018).

Bhutan has the region's lowest pre-primary gross enrolment ratio, with only a third of children enrolled. Privately owned centres represent about 20% of ECCE provision for 3- to 5-year-olds, catering for families in urban areas. Community-based centres in rural areas are supported by various actors, including national civil society organizations and international NGOs such as Save the Children (Pisani et al., 2017; Rao et al., 2020).

In Nepal, early childhood education has one of the region's highest share of private institutions in total enrolment. There are two main types: privately run kindergartens, located in urban areas and serving 2- to 5-year-olds, and community-based centres, some supported by NGOs and others by the government and local communities, for children under 4. Communities provide space and facilitators for the second type of centre. While government-established centres are free, community-based centres run by NGOs receive contributions from parents in addition to government and NGO funding. In 2017, more than 30,000 of about 36,000 ECCE institutions were community centres (Béteille et al., 2020; Institute of Integrated Development Studies, 2022).

While non-state actors fill important gaps in ECCE service provision, there is also one particular type of service where more could be done to meet demand: work-based childcare (**Box 2.2**).

Non-state provision in tertiary education has expanded due to weak public supply

The growth of non-state suppliers is commonly explained as a response to demand for 'different', 'better' or 'more' tertiary education. It is accordingly associated with three main types of non-state institutions: religious-cultural, elite, and demand-absorbing, a term commonly used to describe the mass of smaller, non-denominational institutions (Levy, 2006; Pachuashvili, 2009). With some exceptions, the bulk of non-state provision development in South Asia corresponds to the third type.

In Afghanistan, non-state tertiary provision was illegal until 2006 (Hayward and Babury, 2015), but then rapidly increased to amount to over half of enrolment in 2020. Most of the increase could be explained by lack of supply – over half of upper secondary graduates were left without places in free public universities. As the government struggled to keep up with increasing demand, non-state universities filled the gap, particularly in urban centres (Saif, 2018). In the Islamic Republic of Iran, non-state actors were invited to participate in education due to the gap between public supply and growing demand (Paivandi, 2022). In India and Pakistan, the non-state sector has rapidly increased since the 1990s due to a combination of growing demand, limited public funding and a marked policy shift in the 1980s away from the post-independence strategy of expanding higher education through public institutions (Ravi et al., 2019; Sedgwick, 2007; Varghese and Panigrahi, 2019).

In Bhutan and Sri Lanka, the share of private institutions in tertiary enrolment is about 12%, the lowest in the region. Still, limited government capacity, tightening of public budgets and fear over high levels of brain drain have led both countries to ask non-state providers for support (Institute of Policy Studies, 2022; Schofield and Roder, 2022). In Bhutan, where 25% of the tertiary student population is enrolled abroad, the policy target is to double the number of private colleges from two to four and to increase the share of non-state enrolment to 15% by 2027 (Schofield and Roder, 2022). In Sri Lanka, the first non-state higher education course was recognized in 2000 and non-state participation has since gradually increased, going from 5% of students in 2012 to 12% in 2020.

In some countries, a more recent push by the government to increase public spending and supply has reversed the trend. In Nepal, the limited capacity of the country's only university in the early 1980s opened the doors for the establishment of non-state campuses, both community- and privately managed. The non-state sector grew considerably until 2013, coinciding with a decline in public spending at this level. Since then, the share of government spending has slowly risen again and the share of enrolment in

BOX 2.2:

Employer-based ECCE centres have not managed to meet high levels of demand

Employer-based ECCE services and incentives include childcare vouchers, subsidies, breastfeeding support and on- or off-site childcare centres run or sponsored by the employer. Employers providing childcare programmes can benefit from tax incentives through deductions or credits, and from subsidies, in-kind support and a positive public image (IFC, 2019; UNESCO, 2020). Laws require at least some employers to support or provide childcare for their employees in 26 of 189 countries. In Bangladesh, the Labour Act of 2006 (Chapter 8, Section 94) states that any establishment with 40 or more female workers is required to have a room for children under 6 to be managed by women with expertise in childcare (ILO, 2006). In Bhutan, work-based childcare centres involve a partnership between companies, UNICEF and the Ministry of Education (Tshomo, 2017).

India's Maternity Benefit Act (1961, 2017 amendment) requires all employers with 50 or more employees to provide childcare services for children under age 5 on company premises or in the employees' community. The government provides tax incentives, implementation guidelines and sanctions for non-compliance, but employers say they lack guidance on quality issues, such as curriculum, standards and selection of third-party providers (IFC and Bright Horizons, 2019). In the Islamic Republic of Iran, the National Labour Law (Division 4, Section 78) states that workplaces employing women shall set up children's care centres, such as day nurseries, kindergartens or similar childcare, depending on the age of the child; however, there are few of these types of ECCE services and they charge fees (Sharifian, 2018).

In Sri Lanka, the 1939 Maternity Benefits Ordinance obliges employers 'with a prescribed number of women workers' to establish and maintain a crèche (IFC et al., 2018). With the nationalization of schooling in the 1970s, free education services were extended to schools on tea estates, which existed because they were compelled to provide some option for childcare during work hours. The crèches usually were operated by a young woman with secondary education who was given basic training. When the plantations were privatized in 1992, crèches evolved into child development centres. In practice, employers tend to outsource ECCE services to private preschool providers. Some employers have developed a 'workplace consortium model' to share operational costs (Warnasuriya et al., 2020).

non-state institutions has fallen from 65% in 2013 to 37% in 2020 (Institute of Integrated Development Studies, 2022). In Bangladesh, there was rapid growth in non-state enrolment after 1992, when the first non-state higher education institutions were allowed to operate – but the share fell from 63% in 2000 to 36% in 2020 (Ahmed, 2015; UIS, 2021).

The use of English attracts students to non-state tertiary institutions in the region. In Sri Lanka, the focus of non-state institutions on graduates' English language skills has been identified as an advantage relative to public institutions (Institute of Policy Studies, 2022). In Pakistan, wealthier families often prefer to send their children to English-language private universities rather than the predominantly Urdu-language public institutions (Zubairi et al., 2021). In Bangladesh, English has become the prevailing medium of instruction, used in over 100 non-state universities, while Bangla is the norm in public institutions (Karim et al., 2021). Non-state institutions aim to promote internationalization and student employability, but this approach can exacerbate inequality, as those with low English skills struggle to learn and socialize (Sultana, 2014). English-only policies may also compromise education quality in non-state institutions, since many professors are not sufficiently proficient in English (Karim et al., 2021).

The establishment of tertiary institutions by religious groups in the region is historically tied to governments. In India, the country's first central university, Banaras Hindu University, was established in 1916 with the goal of preserving and popularizing Hindu thought and culture. Such links remain strong to this day. In 2021, Tamil Nadu state opened three colleges under the Hindu Religious and Charitable Endowments Department and ruled that only Hindus could be employed by them (The Hindu, 2021; Times of India, 2021). The Indian government protects the rights of six recognized religious minorities to establish their own higher education institutions, which may reserve up to 50% of spots for students from their communities (Journals of India, 2020). Catholic

> "In Afghanistan, non-state tertiary provision was illegal until 2006 but then rapidly increased to amount to over half of enrolment in 2020"

> Minority religious groups, such as the Bahá'í community, often struggle to meet their education needs

congregations run over 400 colleges and 3 universities (UCA News, 2018). There are institutions funded and managed privately by the Sikh, Jain (Lexlife, 2020; Maes, 2021) and Muslim communities (Bisht, 2018).

Minority religious groups, such as the Bahá'í community, often struggle to meet their education needs (**Box 2.3**). In Pakistan, minority groups have long fought, mostly unsuccessfully, for policies to increase their access to higher education. In 2018, the government rejected a bill that proposed a quota for religious minorities in all public and private higher education institutions (Pakistan Today, 2018). In 2020, Punjab became the first province to set a quota for students from religious minorities (Khan, 2020). Although legislation prohibits religious discrimination, minority religious leaders have denounced discriminatory practices, including the obligation for students to declare their religious affiliation on application forms (USDOS, 2021). In this context, several religious minorities, including Christians in Lahore and Ahmadis in Rabwah, have set up their own institutions (Mehfooz, 2021; OFPRA, 2019). Still, the government maintains a strong presence in many of them. A report has claimed that three of the five Christian colleges nationalized in 1972 remained under government control. In 2021, the Supreme Court ruled for nationalization of Edwardes College Peshawar, a missionary institution, leading to a strong pushback by the Christian community (Chaudhry, 2021).

Non-state provision is dominant and informal in TVET

Participation in technical and vocational education and training (TVET) programmes has consistently increased in recent years, with substantial non-state contributions. Enrolment in short-term training programmes in India nearly quadrupled between 2011 and 2016 to reach more than 8 million learners. In Bangladesh, enrolment in formal training almost doubled from 2009 to 2015. In Pakistan, access to vocational programmes under the Sindh Technical Education and Vocational Training Authority grew by 50% over six years. In Nepal, completion of technical and vocational education almost quintupled in 10 years (Béteille et al., 2020), especially in agriculture and engineering (Institute of Integrated Development Studies, 2022).

Non-state actors have contributed to this expansion. Private registered for-profit providers almost doubled in Sri Lanka between 2011 and 2020 to now outnumber public institutions and compensate for a decrease in not-for-profit provision (ADB, 2015; Institute of Policy Studies, 2022). TVET institutions managed by non-state actors doubled from 3,000 to more than 6,000 between 2012 and 2019 in Bangladesh, where there are only some 900 state-managed institutions (BANBEIS, 2019). In Nepal, community-led institutions have grown fivefold since 2016 (Institute of Integrated Development Studies, 2022).

Public–private partnerships in TVET are widely accepted (ETF, 2020). In the last decade, South Asian countries have used such partnerships to engage with the private sector and meet multiple objectives, first and foremost expanding provision capacity and increasing access to training (ADB, 2017). For example, the National Skill Development Corporation (NSDC) in India was set up in 2009 to leverage the private sector's expertise and resources to train a large and growing labour force. Over the years, the NSDC has established a large network of training partners, including employer representative bodies, which have helped design curricula, deliver training and provide access to skills (Nambiar, 2022). Through the NSDC's catalytic role, more than 600 training partners have been mobilized throughout the country, establishing 10,800 centres and delivering 1,800 courses with a capacity to reach over 5 million people. NSDC reports having trained and certified over 25 million youth and adults through this network of private providers (Desjardins, 2019; UNESCO, 2020).

Still, the private sector is not considered to sufficiently contribute to skills development. In South Asia, only two in seven firms provide formal training to their full-time permanent employees, below the global average (World Bank, 2020). The large share of the informal sector

BOX 2.3:

A grass-roots faith-based university has operated in the Islamic Republic of Iran

Since the Islamic Revolution of 1979, Iran's largest religious minority, the Bahá'ís, have faced numerous forms of persecution. A 1981 official decree granted admission to higher education only to students professing one of the four recognized religions (Islam, Christianity, Judaism and Zoroastrianism). A 1991 memorandum stated that Bahá'ís should be denied entry or expelled from universities (Iran Human Rights Documentation Center, 2011; Yazdani, 2015). Numerous cases of Bahá'í youth being denied university entry or suffering expulsion continue to be reported (Bahá'í World News Service, 2019; Moinipour, 2016; Radio Farda, 2020).

In response, the Bahá'í community founded the Bahá'í Institute for Higher Education (BIHE) in 1987. This grass-roots institution has become a symbol of resilience and empowerment through education (Bollag, 1998; Small Media, 2013). Considered illegal by the government, the institution does not have a physical campus but developed innovative, community-based strategies to continue to function, including establishment of a courier service to collect and deliver assignments and the use of private homes for small-group classes and as libraries for students in various districts (Bahá'í International Community, 2005; Yazdani, 2015). Numerous government crackdowns led to arrests of professors, raiding of homes and confiscation of learning materials (Ahmari, 2012; Bollag, 1998; Iran Press Watch, 2011; Small Media, 2013). With time, the institution began increasingly to rely on a hybrid learning model, which is harder to ban, and has offered online courses since 2005 (Small Media, 2013).

Today, BIHE offers over 35 associate, undergraduate and graduate degree programmes and counts over 700 professors, many of whom are volunteers from around the world through the community's Affiliated Global Faculty. It takes in about 450 students each year, out of over 1,000 applicants. Although BIHE degrees are not officially recognized in the Islamic Republic of Iran, over 85 foreign universities have accepted BIHE graduates for further study.

and the scarcity of large companies further dampen demand for formal on-the-job training (Mehrotra, 2017). About 70% of South Asia's labour force working in non-agriculture sectors is in informal employment (ILOSTAT, 2021). Early and continuing learning is therefore most likely to occur informally. In India, more than four in five people have acquired professional skills informally. It is estimated that they have developed their competencies on the job (39%), have been self-taught (28%) or have had their skills passed down by family (25%) (UNESCO New Delhi Office, 2020).

Traditional apprenticeships follow traditional social norms, do not have a curriculum and do not lead to state-recognized qualifications (ILO, 2019). In Afghanistan, it is estimated that 700,000 apprentices were trained in 2019 through Ostad Shagerdi, an informal type of early skills development, including some three quarters of skilled workers employed in the metal sector and almost all those engaged in automobile engineering (Hatsaandh, 2022).

Non-state teacher education and training providers fill important gaps

In South Asia, non-state actors are significant providers of teacher education and sometimes the majority of them. Their participation has been growing since the 1990s (Sirois et al., 2021). Gaps in pre-service training and outdated methods in in-service teacher education in South Asia have prompted non-state actors to offer their services (Singh et al., 2020; TISS, 2022). Non-state actors provide teacher education in most countries in the region, the exceptions being Bhutan, where only the national university provides teacher training courses (Royal University of Bhutan, 2016; King, 2021), and the Islamic Republic of Iran, where the more than 20 teacher training institutes are all public (Amin, 2020).

In India, non-state actors dominate teacher training. In 2020, there were 16,754 teacher education institutions, 92% of which were privately run and funded through student fees. Their growth was fuelled by diploma requirements for primary school teachers under the

> "Private registered for-profit providers almost doubled in Sri Lanka between 2011 and 2020 to now outnumber public institutions"

> In South Asia, non-state actors are significant providers of teacher education and sometimes the majority of them

2009 Right to Education Act (Sarangapani, 2022). Some 64% of these institutions offer only a single programme, such as Bachelor of Education (B.Ed.) or Bachelor of Elementary Education (UNESCO, 2021). Four states – Maharashtra, Rajasthan, Tamil Nadu and Uttar Pradesh – account for more than half of the institutions (Centre for Policy Research, 2022).

In Bangladesh, the private sector has a significant and growing role in service provision. More than 60% of institutions are private (BRAC, 2022) and more than 40% of secondary school teachers obtain B.Ed. degrees from non-government teacher training colleges (Ahmed et al., 2015). In Pakistan, only 27% of the 217 teacher training institutions are private, enrolling 7% of students (Pakistan NEMIS and AEPAM, 2021).

Some governments have contracted teacher education providers. In Nepal, the National Centre for Educational Development, which is responsible for teacher development, outsources teacher training delivery to non-state entities through short-term contracts typically for one to three years (ADB, 2017). In Sri Lanka, international NGOs, including Save the Children, and companies, including Hemas Holdings, have formed public–private partnerships with provincial authorities that aim to improve teacher training in disadvantaged parts of the Central, Southern and Eastern provinces (Institute of Policy Studies, 2021).

Some non-state organizations that focus on teacher training have a large-scale reach. The India School Leadership Institute, which is the Indian partner organization for Global School Leaders, has worked with over 3,000 school leaders to fill gaps in education leadership training (Global School Leaders, 2019). Its influence extends beyond education provision to support for research and development, funding and advocacy for capacity building in teacher education across South Asia, with significant corporate support (TISS, 2022).

The Centre for Teacher Accreditation (CENTA) is an Indian private teacher certification organization, which reports having reached 500,000 teachers across 68 countries through its platform, myCENTA. It aims to connect teachers to opportunities to support their upskilling. It includes a focus on government engagement and its founder is part of the National Council for Teacher Education committee set up to support the development of India's National Professional Standards for Teachers (CENTA, 2022). The international organization Teach For All, which provides alternatives to traditional university teacher preparation, operates in Afghanistan, Bangladesh, Nepal, India and Pakistan (Teach For All, 2021) (**Box 2.4**).

PRIVATE TUTORING IS A PREVALENT AND GROWING PHENOMENON IN THE REGION

Supplementary private tutoring or 'shadow education' is a prevalent and growing phenomenon in the region, notably in Bangladesh, India, Nepal, Pakistan and Sri Lanka (Joshi, 2020). The share of households in Bangladesh that paid for private tutoring increased between 2000 and 2010 from 28% to 54% in rural areas and from 48% to 67% in urban areas (Pallegedara and Mottaleb, 2018). In Sri Lanka, the share of household spending on tutoring increased between 1995/96 and 2016 from 41% to 65% of urban households and from 19% to 62% of rural households (Abayasekara, 2018). In Nepal, an analysis of 11,000 secondary school students taking the school-leaving certificate examination in 2004 found that more than 50% had used private tutoring (Jayachandran, 2014).

Small-scale or qualitative studies also indicate high levels of prevalence of private tutoring in the Islamic Republic of Iran, where in Khorramabad, 74% of male and 68% of female grade 9 and grade 12 students had received some sort of private tutoring during the previous 12 months (Arani, 2016); in Maldives, where a study of grade 8 and grade 10 classrooms in two secondary schools found that teachers regularly provided tutoring to supplement their incomes (Mariya, 2016).

Student and parent surveys have helped analyse tutoring demand. In India's Assam, Bihar and Odisha states, 61% of secondary school students said they took tutoring due to poor schooling quality, 12% because it was a social norm and 3% because teachers insisted (RMSA-TCA 2016).

BOX 2.4:

Teach For All has become a major influence in the region

Teach For All provides talented young people, who may not have considered an education career, with limited initial training to teach in high-needs classrooms for two years. In South Asia, Teach for All has linked with partner organizations in Afghanistan (2017), Bangladesh (2014), India (2009), Nepal (2013) and Pakistan (2018). The modality emphasizes mentoring and leadership development.

Teach For Nepal recruits outstanding university graduates and young professionals, provides six weeks of residential training and follows up with in-classroom support through coaching and training. It has placed over 400 fellows in 80 schools in Lalitpur, Sindhupalchowk, Dhanusa, Parsa, Dang and Lamjung districts. It is viewed as a competitive programme, with only about 7% of candidates successful. Since 2017, Teach For Nepal has developed partnerships with several local governments (Institute of Integrated Development Studies, 2022).

Teach For India provides five weeks of training before placing fellows in government and low-fee private schools. During their two-year teaching stint, fellows are mentored through city-based Teach For India organizations (Sivasubramaniam, 2020). The programme began as a public–private partnership in 2009 in struggling municipal schools in Pune and Mumbai and had reached five other cities by 2016: Delhi, Bangalore, Hyderabad, Chennai and Ahmedabad. According to Teach for India, 3,800 people have graduated from the fellowship programme and have taught 35,000 students in 7 cities (Subramanian, 2018).

Teach For India's influence is multiplied through members of its alumni network who are in major leadership positions: 77% of its alumni continue to work in the social sector and have founded 168 organizations that influence the lives of students and communities in need. The organization claims that its alumni have reached more than 33 million, or 1 in 10, students in India at various levels of the system (Teach For India, 2021). The programme works with local, state and central governments. For example, the Bengaluru municipal government uses the Teach For India online teacher training portal, Firki, to train government teachers. Teach For India is also part of the Voluntary Action Cell Education Subcommittee of NITI Aayog, a government think tank, through which it influences national policy.

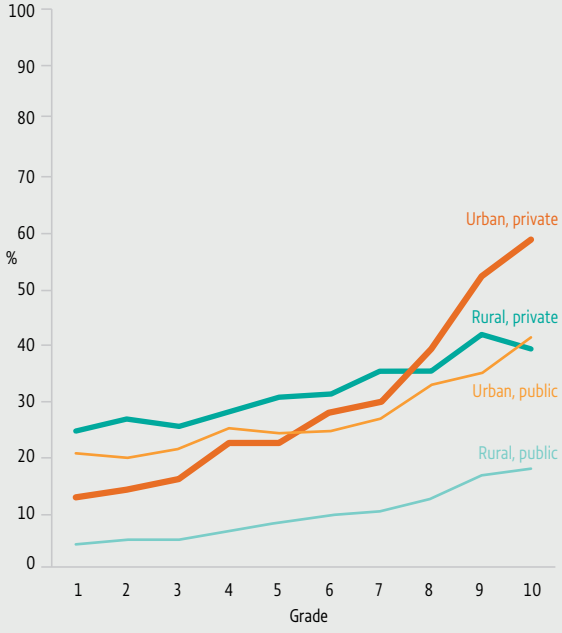
Private tutoring can begin at an early age. In Bangladesh, 20% of pre-primary school children attended private tutoring (CAMPE, 2014). In India, according to the National Sample Survey in 2017/18, 12% of children in pre-primary received private tutoring. Private tutoring's prevalence rises with the education level, peaking in secondary education. High-stakes examinations at the end of secondary education, which often serve as university entrance examinations, increase tutoring's prevalence. In India, less than 1% of candidates succeeded at the Indian Institutes of Technology Joint Entrance Examination in 2017 (Bhandary, 2017). Of the 450,000 who took the preliminary examination for government services training in India, only 0.2% were selected in 2017. These and other selective examinations, including the United Public Service Commission examinations, thus help spur a multimillion-dollar coaching and mentoring industry in India (Sharma, 2022). In Pakistan in 2019, tutoring's prevalence among children in urban areas attending a private school rose from 23% in grade 5 to 39% in grade 8 and 59% in grade 10 (**Figure 2.4**).

There are more and more coaching organizations that provide training for high-stakes examinations. In India, the number of coaching institutions may run into hundreds of thousands. Kota, Rajasthan, known as the 'coaching capital of India', is home to more than 150 coaching institutions preparing students for elite programmes in engineering and medicine, among others (Lakshman, 2022; Rao, 2017). In Bangladesh, private tutoring has evolved from small individual operations to institutional coaching centres due to competitive examinations or dissatisfaction with classroom delivery (Alam and Zhu, 2021).

> "The share of households in Bangladesh that paid for private tutoring increased between 2000 and 2010 from 28% to 54% in rural areas and from 48% to 67% in urban areas"

> High-stakes examinations at the end of secondary education, which often serve as university entrance examinations, increase tutoring's prevalence

FIGURE 2.4:
Private tuition prevalence in Pakistan increases with grade and location
Prevalence of private supplementary tuition, by grade, location and type of school attended, Pakistan, 2019



Sources: ASER Pakistan (2020a, 2020b).

A franchise model of tutoring is prevalent in urban Pakistan, where companies or academies (KIPS, Punjab Collegiate, Students Inn, MAKS Coaching) try to be a one-stop shop for diverse education needs. They run schools and tutoring centres and develop curricula and textbooks. KIPS is among the largest chains, with 14 tutoring centres and schools in Punjab province and in Islamabad. It provides formal schooling during the day and after-school academies, which offer both academic and co-curricular activities, using their own books and in-house activities.

Other franchises operating in less affluent neighbourhoods sublet spaces from private schools to run private academies in the evening. Interviews with franchise owners for this report found that premium academies charged around PKR 9,000 (US$40) per year and smaller academies about half that. There is fierce competition to attract not only popular and experienced teachers but also students who are already performing well in schools, since student performance on high-stakes examinations is used as advertisement to improve academies' branding and popularity (Azmat et al., 2021; Malik and Hossain, 2022).

Even in tertiary education, 13% of students get private tutoring. In India, at both the secondary and tertiary levels, private tutoring is more prevalent for public school students. For instance, 30% of public secondary school students but 24% of their peers in private unaided secondary schools took private tuition (Bhattacharya, 2021; National Statistical Office, 2020).

TEXTBOOK PROVISION VARIES FOR PUBLIC AND PRIVATE INSTITUTIONS

Teaching and learning materials are key for education quality and national identity development. In South Asia, textbook development, publishing and printing are transitioning from a relatively tightly state-controlled system to one where corporate publishers are starting to play a major role. Bangladesh, India, Nepal, Maldives and Sri Lanka have centralized textbook provision systems in which textbooks are manufactured at low cost and distributed free of charge for single use to students. But the presence of a large private school sector supports the existence of commercial publishing (Smart and Jagannathan, 2018).

> There are more and more coaching organizations that provide training for high-stakes examinations

An industry report estimated that India had over 5,000 primary and secondary school textbook publishers in 2015 (FICCI and Nielsen India, 2016). S. Chand Group, the largest textbook developer in India, has a massive national distribution and sales network, including over 5,000 distributors and dealers. Attempts to prioritize government publishing have led to tensions with private textbook publishers. The National Council of Educational Research and Training (NCERT) publishes textbooks used in public schools. The government recommends NCERT textbooks for public and private schools participating in the Central Board of Secondary Education examinations and cautions against expensive privately published textbooks. Private schools and parents argue that NCERT textbooks have production delays and errors and are outdated, all reasons to use other publishers' books (Frontlist, 2019; Mufti, 2017; Vinayashree, 2017). Yet parents also express concern that the textbook industry works with private schools to require costly books that increase financial burdens (Mishra, 2019).

Nepal employs a mixed approach: Government textbooks for grade 6 and above are printed and distributed by the government's Janak Education Material Centre, while grade 1–5 textbooks are printed and distributed by the private sector. Shortages and delays are reported in relation to both (Smart and Jagannathan, 2018). In Pakistan, textbook boards are set up at the provincial level to design textbooks for public schools in the province. Publishers may be contracted to edit, lay out and print them. However, private schools can import, reprint or demand new content for their textbooks. International publishers from Western countries, including Germany and the United Kingdom, are active in Pakistan's textbook publishing industry, catering exclusively for non-state school students (Kaiser, 2017). While the government is in charge of providing textbooks and stationery to all students in Maldives, the state collaborates with various non-state actors for curriculum development and publishing. Local authors are contracted to reform curricula, and international publishing houses, including Cambridge University Press, collaborate with the government (Maldives Ministry of Education, 2019).

EDUCATION TECHNOLOGY PROVIDERS HAVE EXPANDED RAPIDLY

Key actors in education technology are not just suppliers of goods and services but also intermediaries seeking to influence government policy and funding (Miglani and Burch, 2019). Private education technology providers work in both formal and non-formal education, offering products ranging from content to learning management systems and from supplementary tutoring to test preparation (Mukit, 2020; Fayaz, 2022). Since 2015, more than 288 education technology firms have started in Pakistan and fundraising for education technology companies has increased 15-fold (Khoso, 2021). The scale and influence of education technology companies only accelerated during the COVID-19 pandemic.

India's education technology landscape is one of the most vibrant globally. In 2019, there were over 4,500 education technology start-ups (Singh and Dayalani, 2020). While only 16 out of a sample of 127 big education technology firms provided services to higher education (PWC and CII, 2021), it is estimated that higher education institutions spend US$40 billion annually on education content and tutorials, and that this is bound to increase (Chaudhary, 2021). Services provided by these companies include digital libraries and courses, digitalization of application processes and virtual college fairs (PWC and CII, 2021). Nevertheless, given the government's strong restrictions on close ties between higher education institutions and education technology companies, many universities and state governments have been developing in-house solutions (India Brand Equity Foundation, 2021; Sharma and Niazi, 2022).

Boundaries between large providers of textbooks, tutoring and technology are blurring

Publishers are rapidly moving away from an exclusive focus on traditional textbooks, adapting to the increase in distance learning opportunities, with the aim of harnessing technology for learning inside and outside the classroom. They offer new digital products such as e-books, mock tests, digital examination platforms, apps and teacher training content. Some large private

> Bangladesh, India, Nepal, Maldives and Sri Lanka have centralized textbook provision systems in which textbooks are manufactured at low cost and distributed free of charge for single use to students

> International publishers from Western countries, including Germany and the United Kingdom, are active in Pakistan's textbook publishing industry, catering exclusively for non-state school students

textbook publishers in India, including Oxford University Press, MBD Group, McGraw Hill and S. Chand, provide offline and online content suited to a hybrid model of teaching and learning (Kalra, 2020). Their platforms use technology such as QR codes in books linked to videos or quizzes, software for tracking student progress, forums where students can exchange information and platforms for simplified access to relevant literature (Kaushik, 2021; McGraw Hill India, 2022).

As part of digital expansion strategies, big firms market platforms and applications broadly as 'solutions' directed at students, including tutoring, language learning and personalized assessment, and at teachers and school leaders for professional development and teacher training in digital learning. S. Chand blends online and offline interventions with apps and digital initiatives; its vision includes stronger integration of the provision of analytics and insight, digital content, live classes, assessment and teacher content (S Chand and Company Ltd, 2021).

Some large-scale companies aim to cover all educational services and levels. The Pakistani start-up Maqsad, initially a provider of primary and secondary education services, has begun catering for adults by offering professional development courses, aspiring to provide lifelong learning services (Pathak, 2021). Byju's, founded in 2011 and headquartered in Bengaluru, India, quickly became one of world's most valuable education technology companies (Banerjee and Rathi, 2022). While Byju's began with a focus on primary and secondary education (India Brand Equity Foundation, 2021), its lifelong learning vision has kept expanding, with professional upskilling products under its umbrella of education technology services (Bhalla, 2021). Its products offer video-based learning programmes for school students as well as test preparation for national-level examinations to enter engineering, medical, business and civil service careers and for international examinations (Byju's, 2022; Rajan, 2022).

The boundaries between private tutoring and education technology companies are blurring. Education technology companies that provide supplementary education sometimes set up physical centres for students. Byju's plans to open at least 500 of them to address parents' demands to maintain a physical element of learning (Thakur, 2022). Similarly, large coaching institutions are moving into the digital space to counter the rise of education technology platforms by embracing a hybrid online and offline model. This allows them to differentiate their pricing based on the mode of delivery chosen by the student, with lower rates offered for online delivery and pre-recorded lessons than for physical or online live classes (Deka, 2020).

Private tutoring offered by individuals is also moving online. Education technology platforms aim to act as online marketplaces, helping students and teachers connect (Curran and Jenks, 2022). Learning management platforms that help create lesson modules, allow video lessons and integrate payment methods make it easier for tutors to digitize their lessons and reach a larger student base. A Bangladeshi learning management system, Classtune, helps private tutors transition to online teaching and allows them to track student performance and attendance (Rabab, 2021).

SCHOOL MEALS ARE PROVIDED IN PARTNERSHIP WITH A RANGE OF NON-STATE ACTORS

School meals are viewed as a critical investment for better learning outcomes while at the same time keeping vulnerable children in school and improving gender equity in education (Bedasso et al., 2022). Community organizations, private actors, philanthropies and international organizations play an active role in

> The scale and influence of education technology companies only accelerated during the COVID-19 pandemic

> As part of digital expansion strategies, big firms market platforms and applications broadly as 'solutions' directed at students

advocacy, design and training for midday meal provision and policies (Global Child Nutrition Foundation, 2021).

One of the key modalities of providing school feeding programmes for the World Food Programme (WFP) has been partnering with community groups and NGOs with strong local networks and deep contextual understanding (WFP, 2020). For instance, WFP Bangladesh partnered with multiple NGOs, including Rangpur Dinajpur Rural Services (RDRS) and BRAC, to implement the McGovern Dole School Feeding programme. The partnership benefited from RDRS's expertise in high-energy biscuit distribution in schools, while BRAC provided technical support, such as training teachers, to improve the overall quality of schooling (Cano et al., 2018).

Non-state actors have historically been major providers of India's national Mid-Day Meal Scheme, which catered to 90 million children in 2019, making it the world's largest school feeding programme (WFP, 2020). A report on good practices for midday meals in six southern Indian states found a variety of non-state actors involved. Self-help groups cooked and provided meals while private organizations, such as pharmaceutical companies, worked with local governments to provide fortified breakfast items; community experts were mobilized as local nutritional and medical experts in designing the menu, and farmers were asked to set up school nutrition gardens (Mishra et al., 2020). The largest provider of school meals in India is the Akshaya Patra Foundation, the first public–private partnership in India's midday meal programme (**Box 2.5**).

BOX 2.5:

Faith-based decision making influences school meal provision in India

Established in 2000, the Akshaya Patra Foundation is a faith-based non-profit organization. Private donors and state involvement helped expand its reach to become the largest school lunch provider in the world, serving 1.8 million children in 19,000 government and government-aided schools in 14 Indian states (Srinivasaraju, 2020)

The organization receives support from the state in the form of grain and cash subsidies to provide meals from two types of kitchens: centralized or automated kitchens that can produce large numbers of meals (estimated at over 100,000 at a given time) and decentralized kitchens managed by women from self-help groups (Centre for Policy Research, 2022). In addition to state subsidies, it receives up to 60% of its funding from private donors to operate the kitchens (Gujarat CSR Authority, 2018).

The influence of its parent religious organization, the International Society for Krishna Consciousness, extends to management positions in the foundation. The organization adheres strictly to religious values and ensures that menus also adhere to such values, prohibiting the inclusion of certain ingredients.

Right-to-food campaign activists and stakeholders have argued against the growing influence of non-state organizations that base menus on their values instead of making food culturally relevant for diverse groups of children. In 2018, the Karnataka State Food Commission found that Akshaya Patra was the only provider in the state to violate the terms of a memorandum of understanding by not including certain ingredients. An evaluation by the National Institute of Nutrition in 2019, however, found that the food met all nutritional requirements, and as a result the contracts were maintained. Several state governments continue to contract with the organization, whose advantages include its large scale, competitive prices, donor funding and experience in delivering meals in the country for over two decades (Nathan, 2019).

> The boundaries between private tutoring and education technology companies are blurring

> Non-state actors have historically been major providers of India's national Midday Meal Scheme, which catered to 90 million children in 2019

CONCLUSION

From early childhood to adult learning, non-state providers play important roles in education systems in South Asia. They fill government supply gaps. Non-state providers are dominant or the fastest-growing provision category in early childhood and tertiary education. They target marginalized groups that lack access to education of good quality. Faith-based institutions help preserve cultural and religious values in an affordable manner. Most teacher training is provided by private institutions that primarily rely on student fees.

Parents' ambitions for their children's learning and future life chances have led to a rise in private schools at every price range and an emphasis on English-medium education. The intensely competitive education system has led to high prevalence of tutoring after school hours, with a ready supply of underpaid teachers. Large-scale technology companies and franchised school networks have entered or expanded their scope of education activities, seeing opportunity for profit making. Companies are stepping up to meet demand for individualized, personalized education progress.

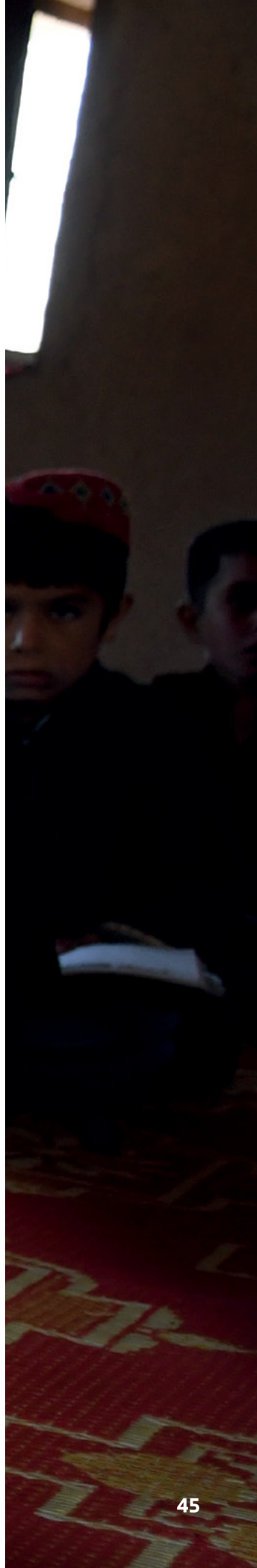
A group of boys study sitting on the floor at a community-based education center in Shurandam village, Kandahar city, Afghanistan.

CREDIT: UNICEF/Karimi

CHAPTER

3

Impact



KEY MESSAGES

- Expansion of access through non-state provision is inequitable. In India, children from the richest quintile were seven times as likely as children from the poorest quintile to attend private early childhood institutions.
- Gender is a determinant of school choice in South Asia. In rural India, girls are 51% of public, 47% of private aided and 43% of private unaided school students. In Nepal, girls are the majority of public (52%) but a minority of private (42%) primary and secondary school students.
- Tertiary non-state expansion facilitated access for privileged groups first. In India, among students enrolled in tertiary institutions in 2018, about 20% from the poorest quartile but 35% from the richest quartile attended private independent institutions.
- Non-profit vocational training providers target the poor, but rarely scale up. In Sri Lanka, the number of institutions managed by non-governmental organizations declined while for-profit institutes surged.
- School facilities are typically better in private institutions. In India, private unaided schools are more likely to have computers, internet and boundary walls, but less likely to have ramps.
- Private schools perform better than public schools on assessments and examinations, but the advantage is eliminated in rural Pakistan and reduced by about half in rural India after controlling for student background characteristics.
- While the impact of tutoring on student performance is mixed, student satisfaction is high. In India, tutoring in Delhi slums did not lead to improved test scores. In Nepal, students reported positive perceptions of the role of English language coaching in their improvement.
- Innovations can be found in state and non-state institutions in early grades. In India, public preschools used more play-based activities, while private ones had more formal instructional styles. Claims of non-state actors' innovations are often not externally evaluated.
- Public tertiary institutions are more likely to be engaged in research, while non-state institutions target labour market needs. In India, about 40% of private colleges offer only one field of study, mostly education.
- Rapid expansion of private schooling has led to stratification and potentially to stigma for public schooling. In Pakistan, analysis of 2014 data from 2,500 schools shows that children were highly clustered in terms of poverty and performance.
- Low teacher salaries are a common but not sustainable means of achieving school cost-effectiveness. Teachers in low-fee private schools in India and Pakistan are paid between one eighth and one half of what public school teachers receive.

Enrolment in non-state institutions mainly depends on ability to pay at each education level 47
Quality and innovation in education are not exclusive to any one type of actor 54
Non-state activities in education may be less efficient than commonly thought 64
Conclusion 67

Following the report's review of the diversity of non-state activities in education, this chapter looks at the evidence on non-state actors' impact on individuals and systems. As described in the introduction, proponents for and opponents of a bigger role for non-state actors in education base their assumptions and justifications on three core arguments: equity and inclusion, quality and innovation, and efficiency. The chapter examines these arguments in turn, reviewing evidence at education levels from early childhood to post-secondary.

ENROLMENT IN NON-STATE INSTITUTIONS MAINLY DEPENDS ON ABILITY TO PAY AT EACH EDUCATION LEVEL

Although there is a variety of providers, the expansion of non-state activity in education has been driven by those charging fees. Using their services thus depends mainly on household ability to pay, which drives a wedge between the twin objectives of improving access and ensuring equity.

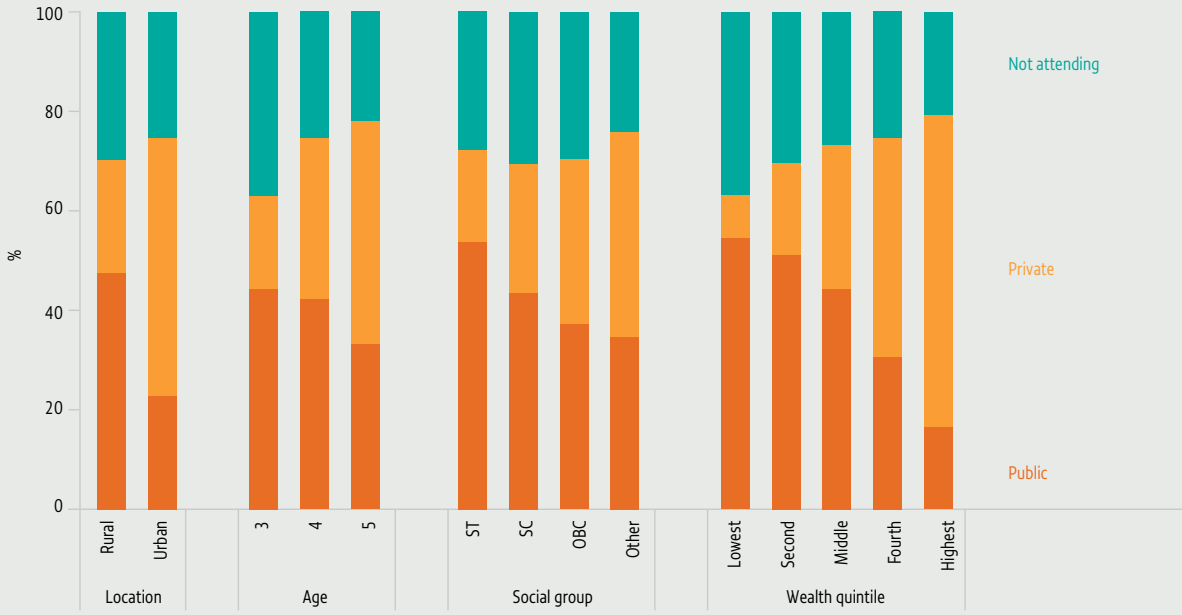
In early childhood care and education (ECCE), non-state for-profit provision is common in urban areas. In Bhutan, government centres are located throughout the country, but private centres are more likely to be in urban areas, although some non-state actors also operate centres in poor communities; examples include the Loden and Tarayana foundations and Save the Children, an international non-governmental organization (NGO) (Rao et al., 2020). Parents of children in private centres had more financial resources, were more likely to be literate and had a higher education level than parents with children in centres supported by the community and civil society (Pisani et al., 2017). In Maldives, most 4- to 6-year-olds are in government schools, but the capital, Malé, has 15 private preschools and just 3 community and 4 government preschools (Shougee and Shareef, 2022).

In India, children from the richest quintile were seven times as likely (63%) as children from the poorest quintile (9%) to attend private institutions (**Figure 3.1**). Children in rural areas and from scheduled tribes were half as likely to use private provision as those in urban areas and non-designated social groups. Still, 9% of the poorest, 18% of those from scheduled tribes and 23% of rural households sent their children to private preschools (India Ministry of Women and Child Development, 2015).

In Nepal, most 'institutional' schools, which are private, are located in urban areas. Children in remote areas – often the ones who need access the most – are left without it due to factors including significant distances between home and school, limited education of parents regarding the benefits of attending ECCE, lack of infrastructure and inadequate funding (Karki et al., 2018; Education International, 2010). Intake at government

> In early childhood care and education, non-state for-profit provision is common in urban areas

FIGURE 3.1:
Wealthy families are far more likely to send their children to private pre-primary education in India
Distribution of children aged 36 to 59 months, by type of education and background characteristics, India, 2013/14



Notes: ST = scheduled caste; ST = scheduled tribe; OBC = other backward classes.
Source: Ministry of Women and Child Development (2015).

institutions is usually for children over age 4, while private ones also admit children under 4 (Institute of Integrated Development Studies, 2022). The tendency of non-state institutions to offer care and education to younger children has also been reported in Bangladesh (BRAC, 2022) and Maldives (Shougee and Shareef, 2022).

In Sri Lanka, about 71% of preschools are managed by private individuals and organizations, 7% by religious organizations, 3% by NGOs and only some 20% by government institutions. Since most childcare centres levy fees, affordable childcare is very limited. Children from wealthier households and urban areas (68%) are more likely to attend than children from rural (48%) and tea estate (44%) areas (Warnasuriya et al., 2020). Private preschools can have highly competitive entrance processes in urban areas, in response to parental demand for academic outcomes.

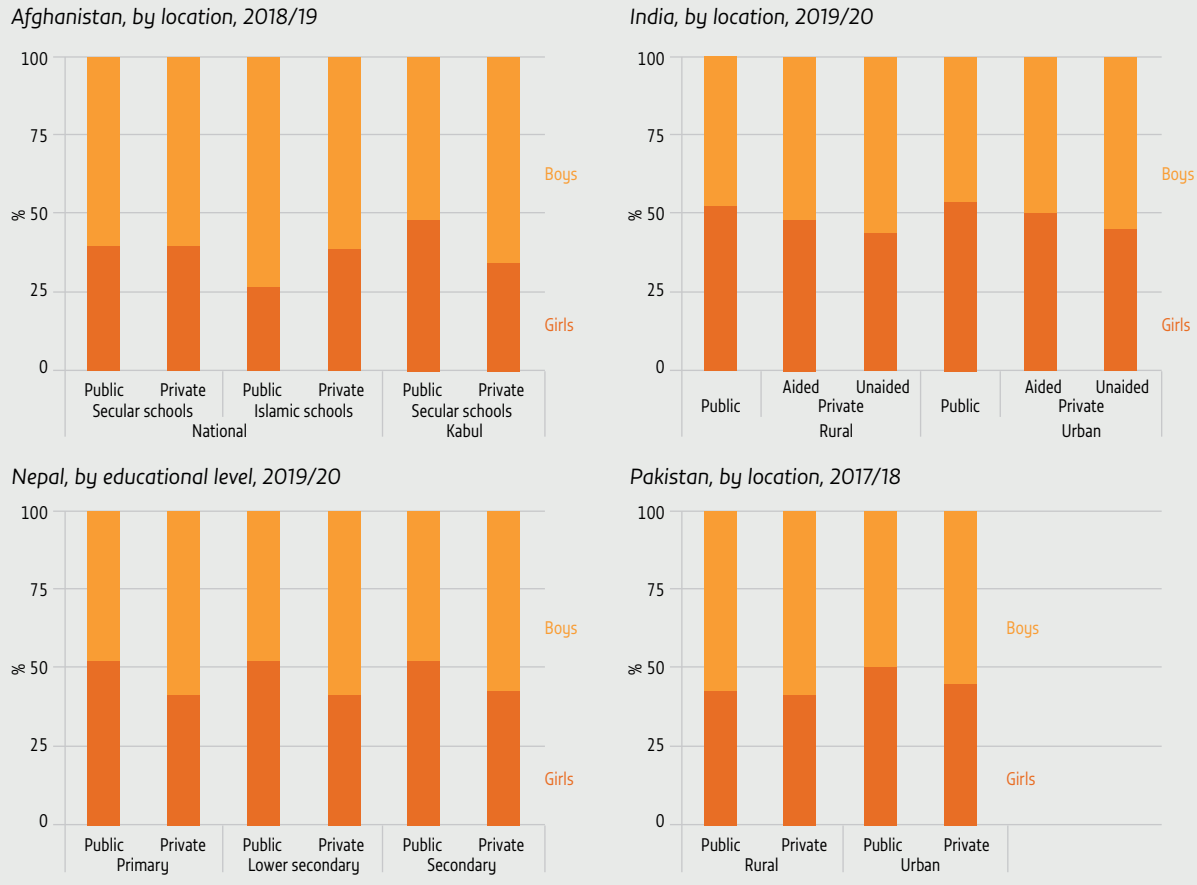
There is usually gender parity in ECCE in South Asia. In Bangladesh, equal numbers of boys and girls attend non-government primary schools with attached pre-primary classes (Bangladesh Directorate of Primary Education, 2021). However, there are exceptions, such as in Pakistani *katchi abadis*, or informal settlements, where 58% of those enrolled are boys (ASER Pakistan, 2021).

Access to more **primary and secondary education** options allows parents to find a school that matches their preferences, stay engaged and see their children achieve better outcomes. However, socioeconomic status is directly related to whether such choices can be made, what information the decisions are based upon and what criteria are used, such as perceived or actual school quality and access to social networks. Parents refer to class size; teacher quality, effort and presence; school responsiveness, discipline and safety: and language of instruction. Poor parents are less likely than rich parents to be able to choose, have access to information and have their dissatisfaction with public services heard or responded to. In Nepal, richer parents who chose private schools were the most engaged and satisfied, while poorer parents, who had no choice and whose children went to poor-performing public schools, were dissatisfied and disengaged (Joshi, 2014a).

Non-state institutions are concentrated in urban areas and wealthier provinces. In Afghanistan, 46% of all private schools are in Kabul, and three quarters of all private schools are in the five major regional capitals (Hatsaandh, 2022). In Sri Lanka, 65% of private schools are concentrated in the richest province, Western province, which accounts for only 29% of the population (Institute of Policy Studies, 2022).

Gender is one of the determinants of school choice in South Asia (Alcott and Rose, 2015), as boys are more likely to attend private schools than girls practically everywhere except Bangladesh. In Afghanistan, before the Taliban takeover, girls were 39% of public school and 28% of private school students; the ratios were reversed among public and private Islamic schools. In rural India, girls are 51% of public, 47% of private aided and 43% of private unaided school students. In Nepal, girls are the majority of public (community) (52%) but a minority of private (institutional) (42%) primary and secondary school students. In urban Pakistan, girls are 50% of students in public but 45% in private schools (**Figure 3.2**). This is consistent with findings in an analysis of Learning and Achievement in Punjab Schools project data, which found that being a girl decreased the probability of attending a private school by six percentage points (De Talance, 2020).

FIGURE 3.2:
Boys are more likely to attend private school in South Asia
Distribution of enrolment by sex and school ownership



Sources: Afghanistan Ministry of Education; Unified District Information System for Education Plus (UDISE+) 2019-20 (India); Centre for Education and Human Resource Development Flash Report 2019-20 (Nepal); and Pakistan Education Statistics 2017–18.

> There is usually gender parity in ECCE in South Asia

POLICIES TO MAKE ACCESS TO PRIVATE SCHOOLS MORE EQUITABLE HAVE HAD MIXED SUCCESS

Faced with unequal access to private schools, India and Pakistan have tried to address the disparity through policy. In Pakistan, public–private partnership programmes have operated through three channels: putting failing government schools up for adoption and operation by non-state providers; introducing double shifts in government schools to let non-state providers use the premises; and providing education vouchers to parents. Interviews conducted with a range of stakeholders in Pakistan for this regional report found their views generally converged to agree that the partnerships have increased availability, accessibility and affordability of education. The Sindh Education Fund voucher arguably brought many private-sector students to such schools (ITA, 2022). An analysis of the location of voucher, subsidy and contract schools in Punjab's public–private partnerships programmes found that these schools were closer to where out-of-school populations were concentrated (Ansari, 2020).

However, some design features of public–private partnership models have had adverse consequences on equity. The Punjab Education Foundation awards financial assistance based on school performance in the annual quality assurance test to hold participating schools accountable. Funding is discontinued if the school fails the test twice in a row (Afridi, 2018; Ansari, 2020; Barrera-Osorio and Raju, 2015). In practice, the competitive pressures of this test-based funding model have been shown to work against equity. In interviews, providers said the pressure to perform well on the test and minimize the risk of losing government funding led to selecting students exclusively based on academic ability as determined by screening in admissions. About 90% of interviewed providers identified the test as one of the biggest obstacles that prevent out-of-school children from accessing school (Afridi, 2018). Still, public–private partnership models are considered successful in expanding access to basic education because different socioeconomic groups are equally represented in such schools (Bedasso et al., 2021).

In India, the 2009 Right to Education Act's Section 12(1)(c) mandated that up to 25% of private unaided schools should admit children with socioeconomic disadvantage. Analysis for this report using data from 2007/08 to 2017/18 found a significant increase in completion rates for children from low-income backgrounds, but the increase was mostly through public schools, with limited contribution from private schools (Bhattacharya, 2022). Analysis of administrative and survey data from Chhattisgarh state has shown that receiving a quota seat makes students 24 percentage points more likely to attend a private school. However, the quota applicants were disproportionately from more educated and better off households. Over three quarters of applicants who did not receive an allotted seat attended private schools as fee-paying students. Thus, while there were clear gains for direct beneficiaries, the quota did not broaden the applicant base (Romero and Singh, 2022).

PRIVATE TUTORING EXACERBATES INEQUALITY IN EDUCATION OPPORTUNITIES

Given the need to pay for the services, access to private tutoring is inevitably uneven. It can further benefit those who were already going to do better in school due to their socioeconomic status. There are differences related to location and income in access to private tutoring. Analysis of the Nepal Living Standards Survey 2010/11 found that richer, more educated and urban parents were more likely to purchase private tutoring services. Families that sent all their children to public schools had a 29% probability of hiring private tutors, compared with 38% for households with no children in public schools, which also spent almost three times as much on private tuition (Mottaleb et al., 2019). In urban Pakistan, 45% of private school students and 25% of public school students had private tuition in 2019; the corresponding shares in rural areas were 22% and 8% (ASER Pakistan, 2020a, 2020b). India is an exception in the region, with parity in the use of tutoring between public and private school students, about 3 in 10 of whom use such services (ASER, 2019).

In Bangladesh, India and Pakistan, boys are more likely than girls to use private tutoring. The gap increases as education and household income levels rise. Males in India were 1.5 times more likely than girls to take private tutoring; the effect of gender was higher among poorer than among richer households. Similarly, in Bangladesh the gender gap in access to private tutoring increased between primary and secondary school (Borkowski et al., 2021).

> Analysis of the Right to Education Act in India using data from 2007/08 to 2017/18 found a significant increase in completion rates for children from low-income backgrounds, but the increase was mostly through public schools

In Sri Lanka, which has a long history of private tutoring, disparity appears to be relatively limited: 60% of students from the poorest and 68% from the richest households use private tutoring, suggesting it has become a social norm (Institute of Policy Studies, 2021). However, the types of private tutoring available are potentially differentiated by students' ability to pay (Deka, 2020).

Some services cater particularly for poorer students. In Afghanistan, civil society organizations, including Musbat Badlon Tolana, have helped increase access to those who cannot afford to pay by providing services for free or at discounted rates (Hatsaandh, 2022). In Sri Lanka, mass private tutoring classes that allow students to take part for free are offered by individuals and institutions. In Galle district, a free Sinhala class served over 100 students from rural areas, helping maintain learning continuity during COVID-19 school closures (Institute of Policy Studies, 2022).

Acknowledging the unfair advantage private tutoring offers in high-stakes examinations, state governments in India's Karnataka and Rajasthan provide disadvantaged students free coaching for teacher training, law, medical and engineering entrance examinations (News18, 2021; News Minute, 2022). In a survey of 300 public and private school principals from Kathmandu and Chitwan districts in Nepal, almost all confirmed they had instituted school-leaving coaching. Two thirds of private schools but less than half of public schools targeted coaching specifically to weaker students (Joshi, 2016).

Throughout the region, teachers who also provide tutoring contribute to inequity, for example, by deciding to teach less in class and save lessons for tutorials. In Nepal, teachers who offered tutoring covered less material in school to increase demand for tutoring. Poorer students who did not enrol in tutoring did worse on exams (Jayachandran, 2014). Teachers were found to be gentler and more attentive during home tutoring than in school teaching (Subedi, 2018). In Sri Lanka, teacher absenteeism is common, and parents have criticized teachers for not covering the syllabus or teaching properly during school hours but encouraging students to attend their private classes (Wettewa, 2015).

TERTIARY EDUCATION HAS GROWN THROUGH PRIVATE INSTITUTIONS, BUT FIRST FOR THE WEALTHY

The wealth gap in access to tertiary education is high in much of the world. Data from the World Inequality Database on Education show that the median global gap in tertiary attendance between the richest and poorest quintiles is 21 percentage points, but in Pakistan it is 24 points and in Nepal 31. High levels of private participation pose a risk of widening the gap.

In India, among students enrolled in tertiary institutions in 2018, about 20% from the poorest quartile but 35% from the richest quartile attended private independent institutions (**Figure 3.3**). Non-state expansion facilitated access for the most privileged groups first, before reaching out to the most privileged members of each group that benefits from affirmative action in government-aided institutions, such as scheduled tribes and scheduled castes (Gérard, 2020). In Bangladesh, non-state colleges and universities mostly increase access for middle-income students, who do not enter the more prestigious public universities but can still afford the much higher cost of attending a non-state institution. Such institutions do not substantially improve access for the poorest 40% of the population (World Bank, 2019).

Non-state tertiary provision tends to be even more concentrated in urban centres than primary and secondary schools. In Afghanistan, about 70% of all non-state higher education institutions are in the capitals of four regions: Kabul (Central), Balkh (Northern), Herat (Western) and Jalalabad (Eastern) (Hatsaandh, 2022). In Nepal, non-profit community campuses

> There are differences related to location and income in access to private tutoring

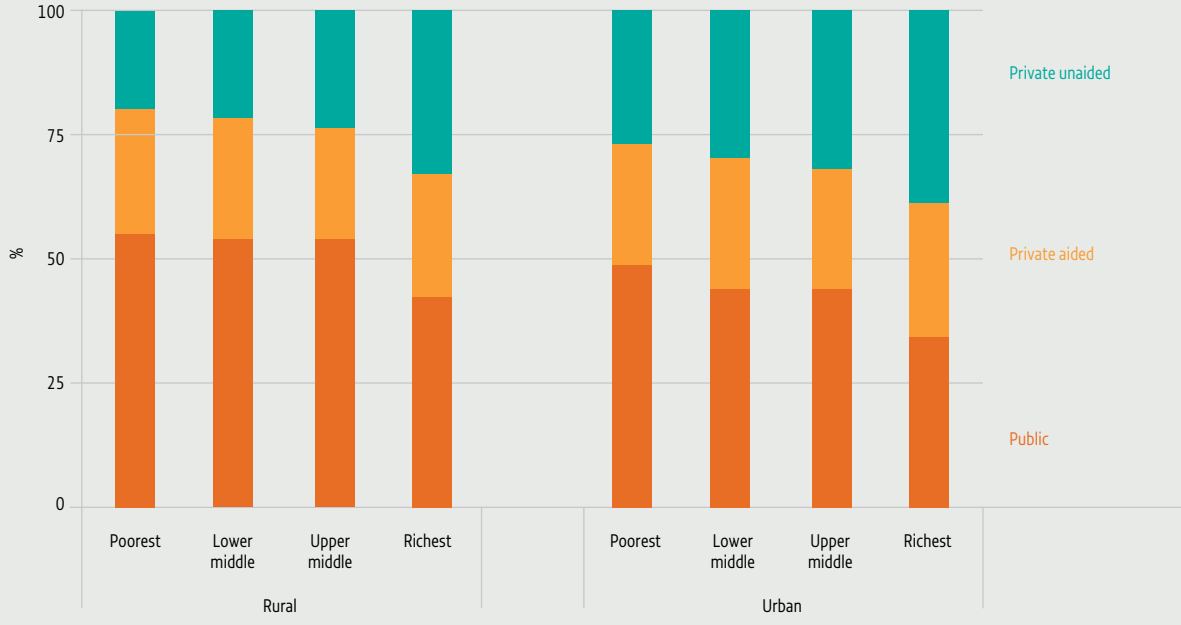
> Acknowledging the unfair advantage private tutoring offers in high-stakes examinations, state governments in India's Karnataka and Rajasthan provide disadvantaged students free coaching

are located in rural areas whereas mainly for-profit, private campuses are concentrated in urban areas (Institute of Integrated Development Studies, 2022). Rural community campuses, which are managed by community stakeholders, have helped improve access to women in rural areas, and therefore overall female participation (Bajracharya, 2020).

NON-PROFIT VOCATIONAL TRAINING PROVIDERS TARGET THE POOR BUT ARE SMALL IN SCALE

In South Asia, access to formal technical and vocational education and training (TVET) is often hampered by institutional barriers, such as tight entry requirements, which can favour male, relatively well-off and urban students. Vocational education institutions require, on average, completion of eight years of schooling to

FIGURE 3.3:
Students from richer households are more likely to enrol in private tertiary institutions in India
Distribution of tertiary education enrolment, by location and income, India, 2017/18



Source: National Sample Survey.

> Globally, the median global gap in tertiary attendance between the richest and poorest quintiles is 21 percentage points, but in Pakistan it is 24 points and in Nepal 31

> Non-state tertiary provision tends to be even more concentrated in urban centres than primary and secondary provision

enrol (Mehrotra, 2017). In Sri Lanka, access to some courses is conditional on completion of previous qualifications and minimum proficiency in mathematics and English (Institute of Policy Studies, 2022). In Nepal, students can have access to vocational education and obtain the Technical School Leaving Certificate if they have passed the grade 10 examination (Institute of Integrated Development Studies, 2022).

Non-state actors may further obstruct equitable access and participation. For instance, in Nepal private TVET institutions charge higher fees than public ones (Institute of Integrated Development Studies, 2022). But non-state actors may have less rigid entry requirements, and NGO-sponsored programmes are more likely to support students and provide them with stipends, uniforms, meals, learning materials and tailored programmes. UCEP Bangladesh, a programme run by a non-for-profit actor, provides both short training courses and formal technical education for marginalized youth at 10 institutions in 8 districts. It is aligned with the National Technical Vocational Qualification Framework and can award formal qualifications. It also provides students with an opportunity for access to further education through a four-year programme at the Institute of Science and Technology in Dhaka (UCEP Bangladesh, 2018).

TVET institutes run by faith-based institutions tend to target the most disadvantaged. In Sri Lanka, the Don Bosco network, a Catholic programme, runs 17 centres providing training to low-income boys. The Sarvodaya Shramadana Movement provides vocational education for girls in the city of Moratuwa (Institute of Policy Studies, 2022).

Girls' participation in TVET is particularly low in South Asia. Only 2% of 15- to 24-year-old women attend vocational education, almost half the proportion of young men. In Nepal, non-state providers such as the independent Swiss NGO Helvetas and the Council for Technical Education and Vocational Training address low female participation through entry quotas and scholarships (Institute of Integrated Development Studies, 2022).

Rural residents are also less likely to benefit from TVET. In India, the government partnered with NGOs and financial institutions to provide entrepreneurship education to rural unemployed youth through Rural Development and Self-Employment Training Institutes. The training, which has been extended to every district, combines both technical and soft skills and may include financial support to promote self-employment (UNESCO New Delhi Office, 2020).

However, not-for-profit interventions are rarely scaled up. In Sri Lanka, the number of institutions managed by NGOs recorded a dramatic decline in the past decade. Youth do not consider their entry-level training offering attractive, and their programmes had trouble meeting the required quality standards. Conversely, the number of for-profit institutes has surged (Institute of Policy Studies, 2022).

> In South Asia, access to formal technical and vocational education and training is often hampered by institutional barriers, such as tight entry requirements, which can favour male, relatively well-off and urban students

> Only 2% of 15- to 24-year-old women attend vocational education, almost half the proportion of young men

QUALITY AND INNOVATION IN EDUCATION ARE NOT EXCLUSIVE TO ANY ONE TYPE OF ACTOR

There is mixed evidence on the difference between public and private providers when it comes to various dimensions of quality. While differences in terms of observable characteristics usually favour non-state providers, much of the gap is erased once unobservable differences are taken into account. Meanwhile, information on sustainable innovations offered by non-state providers remains limited.

STATE AND NON-STATE SCHOOLS DIFFER IN TERMS OF TEACHERS AND FACILITIES

Teachers in the public sector tend to have higher qualifications, but there are exceptions. Analysis of PEER country profiles shows that early childhood education teachers at non-state providers must meet minimum qualifications in six of the nine countries in the region. Despite these regulations, 47% of teachers surveyed from Punjab Education Foundation schools reported not having received any training in the past 12 months. Furthermore, 74% of teachers reported receiving insufficient training to be effective pre-primary teachers (ITA, 2022). A survey of 72 public and private schools conducted for this report found that, overall, government schoolteachers were better qualified, although there still were far more teachers in government institutions with just a Secondary School Certificate (**Figure 3.4**). Similarly, in Sri Lanka, data from the 2017 school census showed that while 98% of public school teachers were either graduates or had received training from teacher training colleges, the corresponding figure among private school teachers was 68% (**Figure 3.4**). Information was not available for international schools.

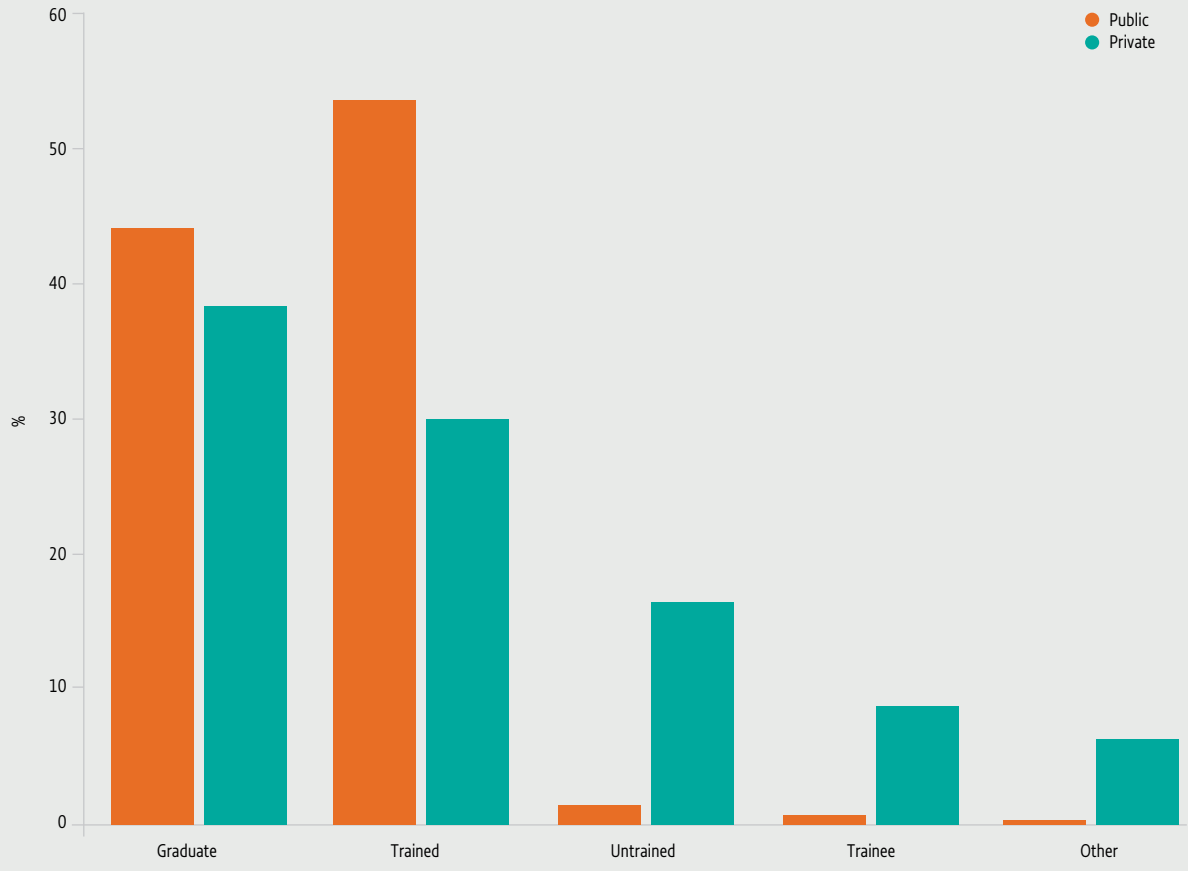
Low-cost private schools usually employ young women as teachers and pay low salaries, as in Pakistan. This is seen as a response by private school proprietors to demand for private education and is facilitated by the availability of teachers willing to work for low wages (ITA, 2022). Analysis of teacher characteristics from the Samata low-cost private school network in Nepal found a high prevalence of untrained teachers, mainly women, working long hours for salaries well below what is needed to make ends meet. Nearly 65% of teachers stated they were in college and 37% stated they also taught at private tutoring institutions or at other schools. Of the surveyed teachers, 75% did not have a teaching licence. For grades 9 and 10, the majority of schools rely on part-time teachers whose expertise is in preparation for the high-stakes examination (Institute of Integrated Development Studies, 2022).

In India, a comparison of teacher subject expertise, classroom practice, professional competency, and local ability and communication, carried out by the Centre for Teacher Accreditation with support from the Michael & Susan Dell Foundation, found that government schoolteachers in Tamil Nadu were as competent on subjects as those in expensive private schools. The main difference was in communication, measured in terms of language, structure, sensitivity and comprehension, with teachers at costly private schools scoring higher (63%) than teachers at government schools (48%) and low-fee private schools (45%) (Ramakrishnan, 2018). Teacher quality differences can depend on subjects at the secondary level, as in Sri Lanka (**Box 3.1**).

High levels of teacher absenteeism in public schools lead to an advantage for private schools in the region. In India, absenteeism primarily reflects differences in responsibilities rather than lower teacher effort, with public school teachers having administrative and political duties (e.g. elections, examinations, census enumeration, data collection) that increase their workload beyond schooling duties (UNESCO, 2017). In addition to this systemic challenge, there was a 17% vacancy rate in public school teaching posts in 2020/21. Government officials in Himachal Pradesh and Rajasthan states expressed concern during field interviews for this report over how teacher engagement in administrative work affects teaching (Centre for Policy Research, 2022).

Data comparing private to public schools showed that, on average, private schools had better facilities in Afghanistan, Bangladesh, India and Sri Lanka (Borkowski et al., 2021). In Afghanistan, the average pupil/teacher ratio was 47:1 in public and 19:1 in private schools.

FIGURE 3.4:
In Sri Lanka, public school teachers tend to have higher qualifications
Distribution of schoolteachers, by qualifications and school type, Sri Lanka, 2017



Source: Institute for Policy Studies (2022).

All private schools had functional buildings while 20% of the almost 14,500 public primary and secondary schools were either in the open air or in tents (Hatsaandh, 2022). In Bhutan, there were 5 children per facilitator in private early childhood education centres, while in public centres the ratio was 9.5, although private teachers were generally less qualified (Schofield and Roder, 2022). In India, private preschools were located in less hazardous areas than public preschools, with buildings designed to function as schools (Kaul et al., 2017).

Comparing government, private-aided and private-unaided schools in India in 2019/20 showed that private schools had better access to internet, computers and boundary walls. However, there was little difference in the availability of drinking water and functional toilets. Private schools (45%) were less likely than public schools (78%) to have ramps for students with mobility difficulties (Centre for Policy Research, 2022) (**Figure 3.6**).

> “Low-cost private schools usually employ young women as teachers and pay low salaries, as in Pakistan”

Misreporting is a problem. A survey of more than 1,000 low-fee private schools in India's Andhra Pradesh Haryana, Jammu and Kashmir and Telangana states showed that nearly half lacked access to the public drainage and sewerage network, but most reported that they could provide safe drinking water and separate toilets for boys and girls, raising the question of whether positive responses were driven by a need to maintain reputation and report compliance with regulations. About 30% of respondents acknowledged issues with safety, teacher quality and student learning and satisfaction (Centre for Civil Society, 2022).

BOX 3.1:

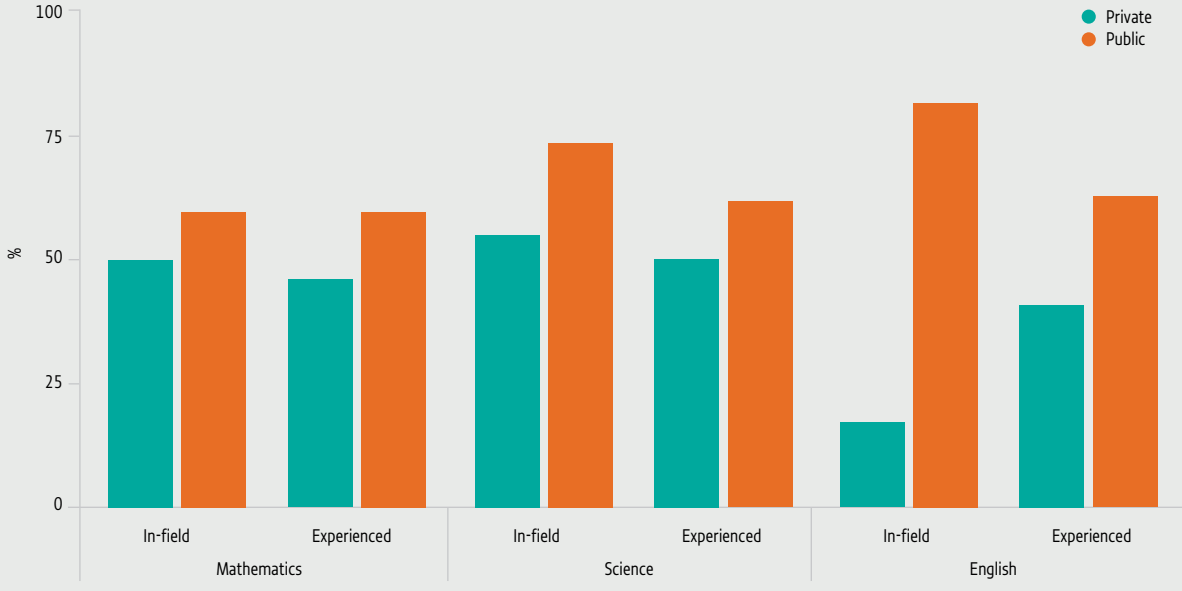
Public secondary school teachers are more likely than private school peers to have subject knowledge in Sri Lanka

According to the 2014 Service Minute of the Sri Lanka Teachers' Service, recruitment to the service is based on four criteria: graduate teachers, trained teachers, untrained teachers with two- to three-year diplomas, or novice teachers not yet absorbed into the teachers' service. Each type of teacher recruit is also categorized according to subject knowledge. Recruitment to the Teachers' Service is also carried out at various levels, referred to as classes, which depend on initial qualifications, teaching experience and examination scores.

A study examining teacher quality in Sri Lankan secondary schools classified teachers who either have a degree in a particular subject or have been specifically trained to teach a particular subject as 'in-field' teachers, those with good knowledge in the subject they teach. The study classified teachers of Class 2–Grade II and higher as 'experienced' teachers.

Using this categorization, there were more teachers with subject qualifications and teaching experience in public schools than in private schools for three subjects considered (**Figure 3.5**). The gap was particularly large in the case of English teachers. However, while public schools have more in-field and experienced English teachers, they are distributed unevenly and are mainly concentrated in more privileged schools. Many underprivileged public schools lack adequate qualified and experienced English teachers (Arunatilake and Abayasekara, 2017).

FIGURE 3.5:
In Sri Lanka, public school teachers tend to have higher qualifications
Share of in-field and experienced teachers in public and private secondary schools, 2018



Notes: In-field teachers either have a degree in a particular subject or have been specifically trained to teach a particular subject. Experienced teachers are Class 2–Grade II and higher. Private schools include both government-assisted and unassisted schools but not international schools.
Source: Arunatilake and Abayasekara (2017) based on school census data.

> High levels of teacher absenteeism in public schools lead to an advantage for private schools in the region

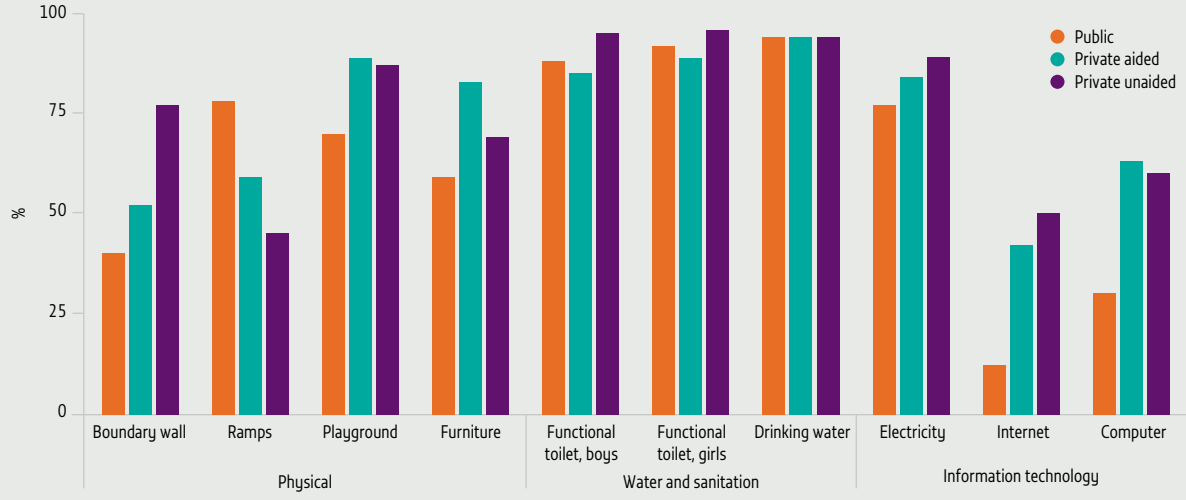
PRIVATE SCHOOL ADVANTAGE IN LEARNING IS OFTEN DUE TO STUDENT BACKGROUND

Public school students generally fare worse than private school students on learning assessments or high-stakes examinations. Analysis conducted for this report in Pakistan shows that students at non-state schools have higher levels of proficiency in English and mathematics but similar levels in Urdu, Sindhi and Pashto. Among 6- to 10-year-olds, 20% of non-state school students and 10.5% of their state school peers were able to perform division (ITA, 2022). In Nepal, the 2019 Secondary Education Examination results showed that 41% of institutional school students but only 4% of community school students attained a grade point average of 3.2 or above (Institute of Integrated Development Studies, 2022). However, the sector is not homogeneous.

Low levels of learning are reported for some non-state schools, especially religious institutions, such as unregistered *qawmi madrasas* in Bangladesh (BRAC, 2022). In Pakistan, less than 10% of 5- to 16-year-olds in *madrasas* achieved foundational literacy and numeracy levels, below even the learning levels of children who left school early (ASER Pakistan, 2021). Low and stagnant levels of learning have been noted at low-fee private schools in India. Parents judge the quality of schooling options on the basis of proxies, such as English-medium instruction or infrastructure, rather than on core learning outcomes, since 60% of private unaided schools do not extend to the grade of board examinations (Central Square Foundation, 2020).

Overall, in India, while non-state schools have a modest advantage in reading and mathematics, there is wide variation between states in the learning achievements of private school students, according to data from the India Human Development Survey and the 2019 Annual State of Education Report (ASER). Grade 5 private school students in metropolitan areas tend to have higher scores than those in smaller towns and villages. A 2013 study by the Michael & Susan Dell Foundation administered tests involving 75,000 students from

FIGURE 3.6:
Private schools in India have superior access to computers and internet
Availability of school facilities by type, India, 2019/20



Source: Unified District Information System for Education Plus (UDISE+) 2019-20.

> Analysis in Pakistan shows that students at non-state schools have higher levels of proficiency in English and mathematics but similar levels in Urdu, Sindhi and Pashto

grades 3 to 7 in Ahmedabad, Bengaluru, Delhi, Dharwad, Hyderabad and Rajkot. It showed that 88% of students in high-fee private schools performed above the intermediate proficiency level, compared with only 38% in government schools and 47% in low-fee private schools (Rajagopalan and Agnihotri, 2014). Analysis of ASER data from India and Pakistan indicates that, for the poorest quintile, a higher percentage of 10- to 12-year-olds in non-state than in state schools could read. Between 2011 and 2018, the gap between state and non-state school performance widened in India and narrowed in Pakistan (Borkowski et al., 2021).

However, once student characteristics are accounted for, these gaps are reduced. A meta-analysis of 17 studies of the impact of various types of non-state provision on foundational literacy and numeracy outcomes in South Asia showed a moderately positive effect on learning, larger for language than mathematics, after controlling for household and school factors. Household survey analysis from India and Pakistan on children in grades 2 to 6 found that controlling for family background eliminated the positive effect of private schooling in rural Pakistan, and reduced it by about half in India (Gruijters et al., 2021). However, it is difficult to draw definitive conclusions. Private unrecognized schools are often missing from data sets. A lack of longitudinal studies makes it difficult to conclude how, why or even which types of non-state providers outperform state schools, not just at one point in time but over time (Borkowski et al., 2021).

An earlier study in Pakistan, Learning and Educational Achievements in Punjab Schools, surveyed 12,000 children in 112 villages to assess their learning in Urdu, English and mathematics. It concluded that school type had a significantly greater effect than other background variables, including household wealth, parental education and the child's age and gender (Andrabi et al., 2007). However, the long-term evidence on continued improvement in already high performing schools was weak (Barrera-Osorio and Raju, 2011). In Sindh province, the Standardized Achievement Test carried out from 2013 to 2016 for grades 5 and 8 showed no significant improvement in learning outcomes (Sohoo et al., 2019).

Comparisons on learning outcomes other than numeracy and literacy are uncommon. Some argue that learning outcomes such as social-emotional learning, cognitive and social development, creativity, social interaction and community engagement are better in state schools (Stromquist, 2018). However, among three cognitive tasks administered in the 2019 ASER in India (seriation, pattern recognition and puzzles), only 24% of grade 1 children could do all three in public schools, compared with 43% in private schools. Analysis in the Islamic Republic of Iran found that students in non-profit institutions consistently performed better on critical thinking and social skills, as the institutions included more content on civic education and skills (Paivandi, 2022). None of these studies, however, controlled for the socioeconomic background of students.

THE IMPACT OF TUTORING ON STUDENT PERFORMANCE IS UNCLEAR

The impact of private tutoring on learning outcomes is difficult to untangle from multiple observable and unobservable variables, such as child motivation and ability, type of school attended, parental gender bias and parental education preferences. A study using ASER data in India, which controlled for unobservable variables, found positive effects of private tutoring on learning outcomes, especially for students in one or more of the following categories: enrolled in public schools, from poorer households and with less educated parents (Dongre and Tewary, 2015). In Nepal, a study of 22,500 students taking the grade

> Household survey analysis from India and Pakistan on children in grades 2 to 6 found that controlling for family background eliminated the positive effect of private schooling in rural Pakistan, and reduced it by about half in India

10 School Leaving Certificate examination found that public school students who had received tutoring had a 1.7 percentage point advantage (Thapa, 2011).

Few studies explore how the length, type and duration of private tutoring affect learning outcomes (Borkowski et al., 2021). An assessment in Sri Lanka showed that an average of five months of tutoring had no impact on grade 5 examination scores (Cole, 2017). However, exposure for 15 to 27 months produced a statistically significant effect on test scores (Aturupane at al., 2013). For a random sample of 100 O-Level and 300 A-Level public school students who sat examinations in 2017 in Colombo, time spent in tuition classes was found to have a positive and statistically significant impact on scores, unlike time spent studying in public schools (Herath, 2019). Another study found that the net effect of private tutoring was reduced once parental education and time spent on homework were factored in (Damayanthi, 2018).

Other studies have found little if any improvement from the effects of private tutoring. In India, analysis of tutoring in Delhi slums found no evidence that tutoring improved test scores (Berry and Mukherjee, 2019). While positive effects of private tutoring were observed in certain subjects in early grades in Bangladesh, the effects diminished in later grades (Ruthbah et al., 2016).

Negative effects of private tutoring on individuals – such as lack of time, psychological stress and intense competition with peers – have also been highlighted in South Asia. In Sri Lanka, 60% of students took private tuition to prepare for the grade 5 scholarship examination despite a perception that the supplementary classes reduced students' leisure time (Abayasekara, 2019). Among grade 8 and grade 10 students who took private tutoring in Dhaka, Bangladesh, 36% said it created a heavier workload and pressure, reducing time for sports and social interaction (Mahmud, 2021). India's 2020 National Education Policy acknowledged the pressure from a coaching culture that dissuades students from true learning by focusing on passing tests (Gupta, 2021). An overt reliance on private tutoring could remove any impetus for reforms to improve the quality of education (Dundar et al., 2017).

Regardless of the availability of robust evidence on student outcomes, it is useful to consider household and student perceptions of the value of tutoring (Ghosh and Bray 2020), which are attributed to immediate feedback and quick redressal of problems in tuition classes even if teachers do not adopt new pedagogical styles (Subedi, 2018). A qualitative study of grade 11 students in Nepal taking English language coaching highlighted perceptions that improvements were due to tutoring and not to regular schooling (Kshtree, 2020). Similar perceptions were reported in Bangladesh (Mashraky, 2019) and Maldives (Shougee and Shareef, 2022).

Personalized learning through education technology can be considered a form of tutoring, but research on the impact of education technology companies that use personalized learning is not conclusive, as the programmes are still new. In addition, the companies may rely on research design that promotes their products (Burns, 2021). A global database of such companies, including 38 from India, found that 71% lacked evaluations of their efficacy, while 10% of companies with evidence cited internal evaluations (Central Square Foundation, 2021). There is limited research on the learning outcomes achieved by students using Byju's products (Smythe, 2021). Papers mostly highlight its success story, using vague research methodologies. Their conclusions describe Byju's product offerings using phrases such as 'dominance over its rivals' (Tripathy and Devarapalli, 2020).

NON-STATE ACTORS ARE INVOLVED IN EDUCATION INNOVATION BUT HAVE NO MONOPOLY ON GOOD IDEAS

Non-state actors have been active in developing innovative solutions for accelerated learning, occasionally working with the government. In Bangladesh, a literacy-based poverty alleviation programme, Ganokendra, with a reach of 80,000 families in seven districts, relies on groups of newly literate women to run community centres, provides them with training support and equips the centres with libraries and facilities to enable them to function as centres empowering communities (Oyasu, 2019). In 2007, the Education for Children of Migrant Labour programme of the Azim Premji Foundation in India, in partnership

“Negative effects of private tutoring on individuals – such as lack of time, psychological stress and intense competition with peers – have also been highlighted in South Asia”

> Non-state actors have been active in developing innovative solutions for accelerated learning, occasionally working with the government

with two construction companies and the Karnataka state education department, aimed to bring migrant children into the mainstream education system within one year through a developmental curriculum approach that included all children regardless of their ability, using multilingual and multilevel teaching and learning processes and resources, and meeting their health and nutrition needs (Kavoori and Subha, 2022).

But innovative curricula are not only available in private institutions. In India, public preschools use more play-based activities, while private preschools have a more formal instructional style (UNESCO, 2021) (**Box 3.2**). The Delhi government introduced a 'happiness curriculum', integrating social and emotional activities in government schools, but the programme has not yet been implemented in private schools. Extreme pressure from competitive examinations means students are likely to engage in rote learning, which destroys creativity (Mehra, 2021). Fee-charging private schools may rely more on rote learning and a strict curriculum because parents expect high scores on high-stake examinations.

A global compilation of 3,000 innovations in education ('an idea or technology that is a break from previous practice, and is often new in a particular context, even if not new to the world') suggested that 60% were implemented by NGOs, 26% by for-profit organizations and 12% by public actors (Winthrop, 2018, p. 6). Of those, 276 were in India, second only to the United States; 49 in Pakistan; 28 in Bangladesh; and 18 in Nepal. India is especially viewed as a laboratory for scaling up non-profit innovations. For instance, FSG, a global non-profit consulting firm, has ambitions to replace rote with activity-based learning to improve early education in private schools. By 2022, its Program to Improve Private Early Education (PIPE) aims to supply high-quality, affordable activity-based learning to at least 500 low-fee private schools. Agastya International Foundation delivers demonstration and activity-based science programmes to more than 1.5 million rural school children each year. Labhya Foundation, in partnership with the Uttarakhand State Institute of Educational Management and Training and the State Council of Educational Research and Training, introduced a socioemotional learning programme, Anandam Pathyacharya, in over 18,000 government-run schools in the state (Pandey et al., 2017).

But few studies exist on how these initiatives affect learning outcomes and most of the research comes from the programmes themselves, rather than independent evaluators. In Pakistan, Teaching in Clusters by Subject Specialists, a programme of the Punjab Education Foundation, has been credited with innovative teaching methods and raising scores significantly within three years of the programme's beginning (Malik, 2010). An evaluation of a low-budget NGO enrichment programme focusing on sports and creative arts in Bengaluru, India, showed significant increases in cognitive, emotional and social life skills (Pearson et al., 2021). An assessment of 1,187 children in 151 schools showed that senior kindergarten children in PIPE schools scored 48% higher on learning outcomes than students in control schools (FSG, 2020).

Foundational learning has received high priority in India's National Education Policy 2020 and has led to the Nipun Bharat programme, which aims to target 50 million 3- to 11-year-old children (India Ministry of Education, 2021). The Central Square Foundation, Language and Learning Foundation, Pratham and Room to Read are among non-state stakeholders heavily involved in its implementation, providing management, technology and pedagogical inputs.

The motivation of non-state actors to improve education is key. An analysis of low-fee private school proprietors in the Indian cities Bangaluru, Hyderabad and Pune found that they started their

> Fee-charging private schools may rely more on rote learning and a strict curriculum because parents expect high scores on high-stake examinations

BOX 3.2:

Play-based learning for the youngest is not limited to one sector

Child-centred teaching focused on play is a vehicle for learning and the development of language, socioemotional and creativity skills. It can range from free play to various forms of guided play where adults can facilitate or direct and structure learning (Whitebread et al., 2012). Both state and non-state actors use play-based learning in South Asia.

In Bangladesh, a BRAC-led initiative, Humanitarian Play Lab, was implemented for children under 6 in Rohingya refugee camps, combining play-based learning and psychosocial support for positive development (Mariam et al., 2021). In 2015, BRAC implemented a pilot programme in government primary schools to improve the pre-primary education learning environment by providing low-cost play materials, creating play-friendly spaces for children and guiding teachers and children to use play inside and outside the classroom. However, an assessment found that play had not been adequately included and only a quarter of the schools had supplementary teaching-learning and play materials (Bhatta et al., 2020).

In Bhutan, both state and non-state ECCE centres are required to follow a curriculum guided by the Ministry of Education and the National Early Learning and Development Standards. Linked to the country's core values on happiness, the learning standards seek to strengthen holistic development of children through play and exploration by addressing their physical well-being, health and motor development, language and literacy, cognition and general knowledge, and spiritual, moral and cultural development (Schofield and Roder, 2022).

In India, the absence of regulations on curriculum and standards results in learning experiences differing across pre-primary education (ASER, 2020). Children in private schools spend far more time in formal teaching and less time in play-based learning than children in government-run *anganwadi* centres. This supports the notion that private schools cater to parental expectations rather than age-appropriate teaching practices. Private provision in Nepal and Sri Lanka also caters for parental demand, which means a focus on academics, as many parents seek to prepare their children for entry into primary education. Most parents, providers and policymakers in Nepal appear to see preschool as an extension of school rather than essential to holistic child development (Institute of Integrated Development Studies, 2022). In Sri Lanka, the lack of a standard early childhood education curriculum means private preschools have developed their own curricula to meet parental demand emphasizing academic development (Warnasuriya et al., 2020).

schools because they wanted to engage in education proactively, expressing concern over the quality of education provided by government schools (Mond and Prakash, 2019). Providers of continuing professional development programmes in India interviewed for this report stressed that their motivation was to address the lack of innovation in state-run training centres. They portrayed themselves as concerned stakeholders, willing to invest in and improve education by engaging in teacher preparation, creating learning systems, and developing child-centred pedagogy and whole-of-school improvement programmes. Several institutions aim to integrate schooling with pre- and in-service education. For example, MN, a Mumbai-based non-profit organization, started with a handful of community members working as early childhood practitioners. It emphasizes schools as a learning space for teachers to observe, research and practise teaching-learning processes. Since 2003, MN has evolved into a hub-and-spokes model with a teacher education centre and seven English-medium municipal schools by training thousands of community members (TISS, 2022).

Despite private actor innovations, public universities still hold more prestige

In tertiary education, quality and prestige are strongly tied to academic personnel and research output, which tend to be better in public institutions. In Bangladesh, non-state institutions tend to recruit part-time, temporary professors, who do not have many professional development opportunities and are not

> "A global compilation of 3,000 innovations in education suggested that 60% were implemented by NGOs"

involved in the long-term development of the institution. Their academic staff also hold fewer qualifications: While one third of professors at public universities hold a Ph.D., only one fifth do so at private ones (World Bank, 2019). It is also common for private universities to hire public university professors as a way of improving quality and standing. In India, public university professors often move to private universities after reaching retirement age, between 58 and 62 years (Powar, 2015).

Most non-state institutions focus on professional and vocational education and do not award doctorates (Seeber, 2016). Still, even among universities, public institutions often take the lead in research output. In Bangladesh, public tertiary institutions are the main drivers of research: In 2020, 11 of the 15 universities with the most scientific articles published, including the top four, were public (Ahmed, 2021; World Bank, 2019). There are notable exceptions. In 2019, one non-state institution alone, BRAC University, spent more on research than 10 public universities combined (Siddiqui, 2022). Access to public funds can help foster research and make institutions more attractive to professors. Non-state providers tend to be left out of research funding opportunities, as in Maldives (Shougee and Shareef, 2022). In Sri Lanka, the government has been trying to help non-state institutions develop their academic capacities by offering Ph.D. scholarships (Institute of Policy Studies, 2022).

Demand for specialized and professionally oriented programmes is shaping tertiary education growth globally, including in South Asia (Muzammil, 2019). Non-state institutions particularly tend to focus on programmes teaching students skills that are rewarded in the labour market and enable them to recuperate the cost of their studies. However, this focus may blunt innovation. Smaller institutions with little capital offer only fields of study that require little upfront investment in infrastructure and are less regulated by governments and professional associations (Asian Development Bank, 2012; Teixeira et al., 2016). In Afghanistan, non-state institutions usually only offer courses with a close link to the labour market (Hatsaandh, 2022). In Bangladesh, the high cost of offering science, technology, engineering and mathematics programmes is a key reason why non-state institutions tend to focus on humanities or business (World Bank, 2019). In India, about 40% of private colleges offer only one field of study, usually education (Muzammil, 2019). In Maldives, lack of field diversification and unavailability of programmes in disciplines considered to be of national importance have been identified as major challenges in tertiary education (Shougee and Shareef, 2022).

Governance and financial ties often make it easier for governments to interfere with public higher education institutions. In India, the government has intervened at several public universities believed to be hostile to official views (Scholars at Risk, 2021). At Nalanda University, government meddling with the composition of its governing board led to two chancellors stepping down (Tripathi, 2017). In Sri Lanka, concerns were fed over a bill that would have placed a public university under the defence ministry and outside the regulatory framework of the Universities Act (De Alwis, 2021). In the Islamic Republic of Iran, there has been opposition to the removal of faculties' right to select university presidents and develop curricula (Golkar, 2015; Radio Farda, 2015).

India's government made it mandatory for academics at public institutions to obtain approval from the Ministry of External Affairs to hold webinars or virtual seminars on topics considered to be sensitive or related to national security, a regulation that does not apply to private institutions (Niazi, 2021a). Governments have also been increasing oversight of non-state institutions in the region. In Bangladesh, the University Grants Commission has proposed amending the Private University Act 2010 to allow the government to appoint vice chancellors to non-state universities, which is already the rule for most public universities (Jasim, 2021b). In India, there are concerns that pressure on public institutions is spreading to non-state institutions, as reflected in the resignation of academics from Ashoka University who were vocal critics of the government (Niazi, 2021b). In Pakistan, the senates of non-state institutions are required to have one government member and one member nominated by the Higher Education Commission (Pakistan Higher Education Commission, 2002).

> "In Bangladesh, non-state institutions tend to recruit part-time, temporary professors, who do not have many professional development opportunities and are not involved in the long-term development of the institution"

> Higher education authorities in Bangladesh, India and Pakistan have published annual lists of non-state universities that operate illegal, unrecognized or fake programmes

The region's non-state actors have been tarnished by accusations of deceptive practices. Faced with such complaints, the Ministry of Education in Afghanistan decided to review the degrees of private universities before they are issued to students, including by potentially testing students to verify they pass a minimum standard (Hamid, 2017). Higher education authorities in Bangladesh, India and Pakistan have published annual lists of non-state universities that operate illegal, unrecognized or fake programmes (Jasim, 2021a; Pakistan Higher Education Commission, 2022; University Grants Commission of India, 2021).

India has had issues of fraud and unprofessional practices in medical training. Government and court records showed that, between 2010 and 2015, at least 69 of the 398 medical colleges and teaching hospitals were accused of rigging entrance examinations or accepting bribes to admit students. The regulator recommended closing 24 of the colleges. In 1980, India had 100 public and 11 private medical schools; by 2015, the respective figures were 183 and 215. Accreditation of private institutions was suspect; many were set up by businessmen and politicians with no experience in operating medical or educational institutions. The Medical Council of India found private colleges hiring people to pose as full-time faculty members and healthy people to pose as patients in order to pass inspections (Clark, 2015). Around 15% of spots in most Indian private engineering and medical schools are reserved under the management quota, a legal provision that allows colleges to select students at their discretion. In practice, these seats are often sold to underperforming rich students, compromising ethical and quality standards (Frayer and Pathak, 2019).

Nevertheless, there is also evidence that non-state institutions can be flexible and faster at adapting to change. In Bangladesh, non-state universities have developed learning modules and training centres focused on improving the cognitive and soft skills of students, a strategy rarely seen in public institutions. They have also offered remedial courses to help prepare students in English and mathematics prior to their degree programmes (World Bank, 2019). These measures have been credited with improving the employability and entrepreneurial spirit of private university graduates, especially as compared with those from public universities (Wadud, 2019).

In Afghanistan, non-state institutions have offered evening classes to attract working students (Hatsaandh, 2022). After the Taliban returned to power in August 2021, a directive ordered male and female university students to be segregated. Most non-state universities were able to comply and resume operations by September 2021, while public institutions failed to do so and remained closed at least until February 2022 (Saif, 2021, 2022). In Bhutan, Royal Thimphu College offered one-off semesters for students studying abroad who had to remain in the country during the COVID-19 pandemic. This has helped promote internationalization of the national education system through partnerships with institutions in Europe and North America (Schofield and Roder, 2022).

Private actors lead innovation in TVET but student outcomes are highly variable

In a rapidly changing global economy, private actors have been filling skills gaps where public institutions have been slow at responding to new demands (Fernandez-Stark and Bamber, 2018). As information technology companies emerged in India in the late 1970s and early 1980s, public vocational education institutions needed their involvement to be able to respond to increasing demand for skilled professionals (Mehrotra, 2017). Medical and computer technology were launched by non-state institutions in Bangladesh, while digital content was provided by the privately run Deerwalk Institute of Technology in Nepal (BRAC, 2022; Institute of Integrated Development Studies, 2022). Conversely, private providers have been less involved in more established sectors, including construction, manufacturing and retail (Flake et al., 2017). In Maldives, private actors are the sole providers of specific skills-based education. The 2021 Higher Education Act recognized TVET as a distinct education level, separate from higher education. So far, only the Maldives Institute of Technology and the Technical & Vocational Education Centre, which are private, have provided training in sectors such as electricity, engineering and construction (Shougee and Shareef, 2022).

Yet private institutions generally cannot afford expensive, innovative technical equipment and offer adequate learning experiences, which may jeopardize the quality of training and learning outcomes (Institute of Integrated Development Studies, 2022). In Bangladesh, there is a substantial performance gap between public and private institutions: 96% of students completing public programmes achieved the highest grades on the Secondary School Certificate examination, compared with 36% of their peers in private programmes (which account for more than three quarters of TVET enrolment). While private institutions have better pupil/teacher ratios and teachers have more industry experience, the teaching force is less qualified and has less teaching experience than in the public sector. They are also less likely to continue their training (Nakata et al., 2018). A review of Nepal's TVET system showed that trainees in private institutions performed worse on the final examination than their peers in public institutions, probably due to a lack of qualified teachers and adequate learning and teaching materials (Sharma et al., 2019).

One way to assess the quality of technical and vocational education is employment results. An evaluation comparing skills development under various programmes in India showed that diligence in provider selection makes a difference in employability. The National Skill Development Corporation was the only institution to include a multiple-step process to select providers: Trainees in its programmes, 90% of which are provided by private actors, increased their employment rate by 11 percentage points from pre-training levels and found more secure jobs than their peers in other training initiatives (World Bank, 2015). An evaluation of employability outcomes for polytechnics graduates in Bangladesh showed no substantial difference in employment status between students in private- and public-led institutions up to two years after graduation. Overall, though, private polytechnics had better links with industry. Some three quarters reported having some form of partnerships with businesses, allowing them to provide students with apprenticeships and workplace visits (Nakata et al., 2018).

NON-STATE ACTIVITIES IN EDUCATION MAY BE LESS EFFICIENT THAN COMMONLY THOUGHT

Non-state activities in education, especially in South Asia, are often credited with introducing efficiency to education systems dominated by a wasteful public sector. While there is value in this argument, the debate often looks only at parts of the system or considers only short-term and not long-term implications.

COMPETITION HAS LED TO EDUCATION SYSTEM STRATIFICATION

Expanding school choice was expected to empower parents, force schools to improve through competition, and increase satisfaction with schooling (Chubb and Moe, 1990). Potential negative consequences included excessive competition: Parents would go to huge lengths to ensure that their children had the best competitive advantage, while schools would change the way they operated, sometimes even at the cost of good pedagogical practice, and would select students, possibly leading to exclusion.

Education has characteristics that make it less conducive to the kind of market competition that may yield benefits in other areas of social and economic life. For example, the presence of private or other schools in near proximity may not be a sufficient incentive for public school authorities to improve if they lack the financial resources or autonomy to respond. Since the early 1990s, middle and even lower-middle-class families in India have stopped sending children to government schools (Nambissan, 2009). An analysis of the Foundation Assisted Schools programme in Pakistan, a public–private partnership, showed that its schools had a negative impact on enrolment at nearby public schools (Ansari, 2021).

Depending on one's perspective, the flight from public to private schools may be interpreted as a sign that the private programme is effective, or that it causes irreparable harm to public education.

> As information technology companies emerged in India in the late 1970s and early 1980s, public vocational education institutions needed their involvement to be able to respond to increasing demand for skilled professionals

> Education has characteristics that make it less conducive to the kind of market competition that may yield benefits in other areas of social and economic life

Hardly any analyses of systemic consequences of competition in the region have been done. In Nepal, public school outcomes did not seem to be associated with the extent of private competition. But the gap between public and private school outcomes was higher in localities with higher growth in private education, suggesting stratification (Joshi, 2020).

Analysis of 2014 ASER Pakistan data from 2,500 schools showed that children were highly clustered in terms of poverty and performance: 37% of children would have needed to change schools to make the distribution of disadvantaged children even across all schools. The economic background of students at government schools is more mixed than at private schools. Richer provinces, including Punjab, Azad Jammu and Kashmir, and the Islamabad Capital Territory, have higher segregation than the more deprived regions of the Federally Administered Tribal Areas, Gilgit-Baltistan and Khyber Pakhtunkhwa (Siddiqui, 2017).

There is also the problem of stigmatization of public schooling, even for the best-performing public schools. In two districts of Nepal, middle class parents avoided the public schools viewed as best in a census of secondary school principals – who cited their holistic focus on student development and astute leadership – because they lacked prestige and did not teach in English (Joshi, 2018).

The emptying out of public schools leads to consolidation pressures. India has a huge number of small public schools (Kingdon, 2017). NITI Aayog's Sustainable Action for Transforming Human Capital in Education project in Jharkhand, Madhya Pradesh and Odisha states has pointed to school mergers as a key way to optimize resource use by redirecting resources from small to medium-sized and large schools (Niti Aayog, 2021). One adverse consequence of the Right to Education Act Section 12(1)(c), which required private schools to enrol disadvantaged students to improve social cohesion, may have been that it helped accelerate the emptying out of some public schools. Karnataka state amended a rule to make it no longer mandatory for private unaided schools to admit students if there were government or aided schools in the same locality. The Karnataka High Court upheld the amendment after it was contested by parents who wanted to maintain access to private schools (The Hindu, 2019).

Competition between public and private schools takes several forms and yields various policy responses. Some public schools in the region have switched to English medium, commonly used by private schools, which may be seen as a negative consequence of competition (Joshi, 2016). India's Rajasthan state converted 432 government schools into English-medium schools as of the school year 2022/23 (Times of India, 2022). This policy is also prevalent in public schools in urban areas of Nepal, but is a challenge for government, education institutions and teachers, as well as students, who cannot receive English-medium support at home (Joshi, 2016).

COST-EFFECTIVENESS ACHIEVED THROUGH LOW TEACHER SALARIES IS NOT SUSTAINABLE

Proponents of non-state activity in education argue that private providers are more cost-efficient. Such efficiency gains have to come from somewhere, and teacher salaries, as the largest education cost, are a likely source. But while non-state actors may increase cost-efficiency by hiring young or unqualified teachers in some schools, this is not a sustainable solution.

Education expansion through private schools and public–private partnership arrangements in the region has been facilitated by low teacher salaries. Teachers in low-fee private schools in India and Pakistan are paid between one eighth and one half of what public school teachers receive (GCE, 2016). And even public school teachers are paid less than other professionals in the region, on average (Beteille et al., 2020). In India's Andhra Pradesh state, voucher recipients in private schools were found to perform on about a par with non-recipients in public schools at less than one third of the unit cost at public schools and one sixth of the teacher salary cost (Muralidharan and Sundararaman, 2015).

Employment of young, unqualified female teachers with limited employment alternatives has been recognized as a key component of the low-cost private school business model in Pakistan (Andrabi et al., 2007). In Punjab province, the four public–private partnership programmes paid between US$3 and US$9 per student per month, while the government paid US$9 per student per month in public schools. Lower salaries enabled the lower cost per student (Crawfurd and Hares, 2020).

Public schools tend to serve more disadvantaged populations, which are costlier to educate and are more likely to be in rural areas, where costs are higher still. Low salaries do not help in this situation. Moreover, relying on teachers with lower qualifications through unequal contract arrangements becomes unsustainable when non-state teachers begin to demand rights comparable to those of their state counterparts (Singh, 2020). Effective governance calls for treating the education system as one, finding direct and sustainable ways to address imbalances and inefficiencies. Finally, inadequate salaries prompt teachers to provide private tutoring after school hours. In Bangladesh, the mainstream education system has reportedly lost some of its most talented teachers to the shadow education system, which can yield far higher average income (BRAC, 2022). In India, some of the best instructors at tutoring centres in Delhi were previously the best teachers at high-performing schools who shifted to tutoring for higher earnings (Punjabi, 2020).

SOME NON-STATE EFFORTS TO DEVELOP TEACHER CAPACITY HAVE NOT BEEN EFFICIENT

The involvement of non-state actors in contributing to education system development has not always been constructive. Analysis of Teach for America and its international adaptations has highlighted how they have undermined professional teacher education and advocated school choice as a solution to under-resourcing of public education systems (Straubhaar and Friedrich, 2015). For instance, a mapping of the social network and interactions around Teach for Bangladesh finds that the organization functions as a policy network, which has pushed for local institutionalization of US-style policies in teacher education and for sharing governance of democratic processes with entrepreneurial individuals and their organizations (Adhikary and Lingard, 2018).

In India, the 2009 Right to Education Act mandates that only those with recognized diplomas or undergraduate degrees in education can teach in government schools. However, in 2015, Teach For India signed a memorandum of understanding with the Delhi municipality that referred to its fellows as 'teaching resources', rather than teachers, allowing them more pedagogical autonomy and creating a parallel institutional regime to that of government schools. They could bring in volunteers to help with their work, and Teach for India could appoint two fellows per classroom to teach larger classes. They were exempt from administrative work that government teachers were required to perform in government schools. They also were allowed to focus only on teaching English, mathematics, environmental studies and science, while government teachers had extra duties teaching other languages at the primary level.

The disruption this agreement caused also had other repercussions. Since fellows were paid through internal organizational funds and had other privileges as well, they were also allowed to take their students on varied extracurricular activities and excursions, while municipal teachers had permission and funds for only one excursion annually. Schoolteachers felt insecure and resentful as they perceived school principals as giving fellows preferential treatment. School principals, for their part, were careful in trying to balance these relationships, since they believed the fellows could bring more resources into their schools. Fellow autonomy amplified the disparity in materials available to the English- and Hindi-medium sections. Glaring differences between the sociocultural backgrounds of Teach for India fellows and those of their students also risked being detrimental (Subramanian, 2020).

> “Education expansion through private schools and public–private partnership arrangements in the region has been facilitated by low teacher salaries”

> Expansion of non-state provision has typically displaced public provision in urban and wealthier areas, determining access based on ability to pay, exacerbating inequality and introducing social stratification

CONCLUSION

This chapter has reviewed the three core arguments used by proponents and opponents of a strategy of education expansion based on non-state actors. The first argument is equity. Non-profit providers have helped target interventions, and public–private partnerships have targeted areas with larger out-of-school populations. However, their operations are typically small. Ultimately, expansion of non-state provision has typically displaced public provision in urban and wealthier areas, determining access based on ability to pay, exacerbating inequality and introducing social stratification.

The second argument is quality and innovation. Private schools are perceived as being of better quality. This is based on observable characteristics, combined with a lack of trust in government and somewhat superficial comparisons of performance in high-stakes examinations, the most closely followed indicator of quality. Once socioeconomic background is controlled for, much of the private school advantage is reduced. There is also growing awareness of the wide range of results within non-state institutions, including low learning levels in these institutions. Moreover, non-state actors are not the only providers of innovation in pedagogy.

The third argument is efficiency. The success of non-state provision has expanded by offering services at a low cost, drawing from a pool of primarily young women with few alternative employment opportunities. The sustainability of this approach needs to be examined from a long-term perspective, as the model does not directly solve either the issue of teacher pay or the major question of quality in South Asian education systems.

Kalimullah, 14, learns the Koran in a *madrasa* in Kuchlak, Quetta district, Balochistan province, Pakistan.

CREDIT: UNICEF/Zaidi

CHAPTER

4

Governance and regulation

KEY MESSAGES

- Responsibilities for managing and monitoring non-state providers are often divided. In Pakistan, *madrasas* are governed by the Ministry of Religious Affairs. Almost all the 389 international schools in Sri Lanka are registered as private businesses and are not under the education ministry's purview.
- All countries have regulations on registration, approval and licensing to establish schools. India's 2009 Right to Education Act states that if non-compliance with standards exceeds three years, authorities must withdraw recognition and owners are liable for substantial fines if they continue to run the school.
- Certification and working conditions are more clearly specified for public than private school teachers. In Nepal, all teachers need to have a licence from the Teachers Service Commission and the salary cannot be below the minimum scale set by the government. But government schools have separate regulations on allowances, leave, pensions and other benefits.
- Regulations for private tutoring and technology providers lag behind. In Bhutan, India and Sri Lanka, no licensing or registration is required to set up a private tutoring business.
- Meaningful enforcement of regulations is impeded by lack of human resources. In Bangladesh, in 2022, only nine officials worked in the University Grants Commission's private university wing, responsible for monitoring the 108 private universities in the country.
- Long registration regulatory processes are a burden. In Delhi, India, 28 certificates or approvals from 6 departments are needed to open a private school. Officially, the process should take four months at most, but some cases have taken over five years and many schools remain unrecognized.
- Public–private partnerships require clarity over public and private actors' roles and responsibilities. After a 2015 evaluation, reform of India's National Skill Development Corporation improved regulatory oversight and strengthened emphasis on quality and monitoring.
- Providers view government regulations as burdensome rather than supportive. In Bhutan, the 2012 Rules and Regulations for the Establishment of Colleges required all colleges to have 15 acres of contiguous or near-contiguous land, a difficult and expensive feat near urban areas.
- Regulation limitations fuel corruption. In India, 80% of recognized low-fee private schools in Telangana state, 72% in Andhra Pradesh, 43% in Haryana and 35% in Jammu and Kashmir reported they had to pay more than what was officially required to obtain certification.

Responsibilities for managing and monitoring non-state provision are spread out 71
Regulations focus on entry and exit and not on equity and quality 74
Enforcement of regulations is riddled with implementation challenges 81
Provider experiences need to be reflected in better regulation 86
Conclusion 91

As the primary duty bearers of the right to education, governments need to ensure education system steering, oversight, monitoring and accountability. They are expected to establish sound regulatory frameworks ensuring that as non-state provision of education goods and services expands, providers operate under the same conditions, everyone can fulfil their right to education, and public funds are used efficiently, effectively and equitably.

This chapter analyses how non-state provision is governed in the region. It maps what aspects of education systems are regulated, with a focus on regulations that apply for non-state actors, and the types of non-state activity where regulations lag behind. Provider perspectives and experiences with the application of these governance and regulation mechanisms conclude the overview.

RESPONSIBILITIES FOR MANAGING AND MONITORING NON-STATE PROVISION ARE SPREAD OUT

The governance of non-state actors in education generally does not differ from that of state actors, but there are some significant differences. In **early childhood education**, reflecting the multisectoral needs of the population served, the education ministry or another ministry (e.g. social policy or women's affairs) or agency may lead. Most countries struggle to govern early childhood education well, especially for children under 3, as it demands strong coordination, collaboration and cooperation between sectors and between levels. In India, despite the presence of a dedicated Ministry of Women and Child Development, coordination with multiple education departments at the national and state levels is weak (Kaul, 2019). In Sri Lanka, until recently, pre-primary and primary education were overseen by different entities and understanding of age-appropriate curricula varied. The growing influence of private primary schools has led to a shift towards academic skills and away from holistic child development (Institute for Policy Studies, 2022).

Primary and secondary education governance mainly lies with the education ministry, while local institutions and school management committees play complementary roles. Responsibility for quality assurance is with the education ministry or sometimes other authorities. In Pakistan, private school regulation is based on federal legislation, while Khyber Pakhtunkhwa province and Islamabad Capital Territory have also established their own regulatory authorities (ITA, 2022). In Afghanistan, the Directorate of Private Education Institutions was established at the Ministry of Education in 2017 (Hatsaandh, 2022). In countries with a significant presence of faith-based schools, a ministry or other authority of religious affairs is usually involved.

> Most countries struggle to govern early childhood education well, as it demands strong coordination, collaboration and cooperation between sectors and between levels

In Bangladesh, uniquely, school education is divided between the Ministry for Primary and Mass Education (up to grade 5) and the Ministry of Education (from grade 6 and above). The administration of school education by two ministries creates issues of coordination, continuity and articulation in terms of curriculum, teachers, quality and standards, and service expansion. The *madrasa* stream is further divided into formal and government-assisted *aliya madrasas* and non-formal *qawmi* institutions. A draft education sector plan, prepared in 2020 by a national expert team, has not yet been formally endorsed, which perpetuates discrete subsector plans (BRAC, 2022). In Pakistan, the *deeni madaris* have been registered under the Ministry of Religious Affairs. They are now expected to be transferred to the umbrella of the federal ministry of education.

In Nepal, for the first time in over three decades of decentralization, local governments now have the responsibility for education. This creates a range of challenges. For instance, there is a lack of adequate human and other resources to regulate early childhood education, as focal persons have limited knowledge. Although federalism has shifted authority over schools down to local government levels, it has also shifted authority up, from head teachers and school management committees to local governments. The new supervisory roles of local authorities may mean that school actors become more constrained by local government authorities, who are physically closer to schools than the federal authorities are, and have more of a direct interest in what is happening in schools (Schaffner et al., 2020). The extent to which private schools are allowed to function is increasingly dependent on the relationship between schools and the local government under which they operate (Institute of Integrated Development Studies, 2022).

There are additional governance structures to facilitate private engagement. In Pakistan, the government established five semi-autonomous provincial foundations to increase access through public–private partnerships by either taking over weak schools or establishing new ones. The School Education Department and the Punjab Education Foundation outsource the management of low-performing schools to the private sector. The Sindh Education Foundation was established as a semi-autonomous organization. Sindh was the first province to establish a public–private partnership unit in the Education and Literacy Department, in 2013, to procure school management services. Two projects, the New School Program by the Punjab Education Foundation and Promoting Private Schools in Rural Sindh by the Sindh Education Foundation, fund non-state actors that establish and manage new schools in remote, underserved localities (ITA, 2022). In India, too, there has been a shift of emphasis from school types – government, private aided and private unaided – which defined government support, to public–private partnership programmes. The respective project management units are operated by private-sector actors (Centre for Policy Research, 2022).

Stipulations for parental participation in private school governance are limited. In India, only 6 of the 31 surveyed states and union territories require schools to have a parent–teacher association and only 5 require parents to have a role in fee regulation. In Bihar, unaided schools are required to consult parents through parent representatives before revising their fees (Mehendale, 2020).

At the **tertiary** level, a common pattern is autonomous public universities being responsible for accrediting and monitoring non-state institutions, particularly colleges or campuses. In Bangladesh, the National University is responsible for accrediting and monitoring all private colleges (World Bank, 2019). In India, private colleges are established through affiliation with state or central universities, which are responsible for ensuring that regulations are followed. In Nepal, the University Grants Commission monitors only universities and community campuses that receive public funding. Private campuses are the responsibility of their affiliated public universities, which control their programmes, assessments and curricula, and are not monitored by the Ministry of Education, Science and Technology. In Pakistan, private or chartered colleges may be affiliated with state or non-state universities (Pakistan Higher Education Commission, 2007). Quality control may be outsourced to non-education public entities. In Sri Lanka, the monitoring of some private institutions

“At the tertiary level, a common pattern is autonomous public universities being responsible for accrediting and monitoring non-state institutions”

> Adult education is usually governed by education ministries, although some countries have tried to involve NGOs and civil society organizations in more participatory mechanisms

is done by the Board of Investment, an autonomous public agency, without any influence from the University Grants Commission or the Ministry of Education (Institute of Policy Studies, 2022).

Monitoring the tertiary education system is complicated because it is fragmented. In Bhutan, private institutions have complained that a lack of coordination across ministries leads to significant delays (Schofield and Roder, 2022). In India, monitoring of teacher training institutes is done by several monitoring agencies with different compliance norms and monitoring modes. Sometimes one institute can be monitored by two agencies, and institutes in the same state may receive accreditation from different bodies. This fragmented structure and a lack of coordination between stakeholders such as the government, University Grants Commission and universities have been flagged as constituting an important challenge (Centre for Policy Research, 2022).

The management of **technical and vocational education** and training (TVET) needs to integrate diverse interests and perspectives while ensuring equity, inclusion and quality. Private-sector involvement has often been considered an opportunity to align skills development systems with labour market demand (Dunbar, 2013; Mehrotra, 2017). Systems that include the state, employer and worker representatives cope well with changing labour market dynamics. Such tripartite arrangements have been set up in Bangladesh and Sri Lanka. In India, specialized research institutes, education institutions and ministries participate in social dialogue (ILO, 2021).

Sector skills councils exist in Bangladesh, India and Sri Lanka. They convene actors in a given industry to support workforce skills development (ILO, 2019). They produce knowledge, identify new labour market demands, define occupational standards and assure quality (ETF, 2020). In Bangladesh, industry skills councils assure quality standards in training provision and assessment. They identify industry assessors to represent them on the main quality assurance body, the Bangladesh Technical Education Board (ILO and World Bank, 2017). Under the lead of the National Skills Development Authority, a range of actors, including foundations and non-governmental organizations (NGOs), have joined decision-making processes (BRAC, 2022). In India, sector skills bodies develop training requirements that are relevant for vocational institutions (ILO, 2020). In Sri Lanka, skills councils have been established in sectors including construction and tourism, although their influence on decision making is considered limited (Institute of Policy Studies, 2022). Under the second phase of the TVET Sector Support Programme in Pakistan, the involvement of the private sector in governance bodies is scheduled to be increased. Employers are expected to participate in decision making and to lead management committees of selected TVET institutions (ITA, 2022).

Adult education is usually governed by education ministries, although some countries have tried to involve NGOs and civil society organizations in more participatory mechanisms. The Afghan National Association for Adult Education is responsible for coordinating literacy programmes provided by the state and non-state actors within the Ministry of Education's Literacy Initiative for Empowerment (Robinson-Pant et al., 2021). But international partners have sometimes promoted adult learning strategies with standards and priorities that were not aligned with national plans (Hatsaandh, 2022). In Bangladesh, drawing on a participatory approach, the Non-formal Education Development Programme is expected to establish a national steering committee encompassing partner organizations, district and subdistrict representatives,

> Regulations for school establishment are prevalent while those for equity and quality are neglected

> All countries in the region have regulations on registration, approval and licensing to establish schools

community learning centres and local implementing agencies. Strong representation of non-state actors in the governing mechanism, however, has been reported as being one factor stalling its approval (BRAC, 2022).

REGULATIONS FOCUS ON ENTRY AND EXIT AND NOT ON EQUITY AND QUALITY

The aim of regulation is, ideally, to mobilize all available resources to promote education development that serves the academic, socioemotional and well-being needs of every learner and educator while also achieving desirable system outcomes related to equity, inclusion, quality, innovation and efficiency (**Figure 4.1**).

Mapping the regulations concerning non-state activity in education for this report shows that regulations for school establishment – emphasizing infrastructure, teacher standards and fee levels – are prevalent while those for equity and quality are neglected (**Table 4.1**). Non-state activity beyond schooling, such as private tutoring, is also insufficiently regulated. The same general observations apply to a review of regulations in India by state (**Figure 4.2**). Establishing an institution involves a variety of steps and certifications.

ESTABLISHING AN INSTITUTION INVOLVES A VARIETY OF STEPS AND CERTIFICATIONS

All countries in the region have regulations on registration, approval and licensing to establish schools. In India, national- and state-level legislation overlaps. An analysis of 56 laws from 12 states found a strong emphasis on input-related parameters linked to registration, such as classrooms, toilets, drinking water facilities, kitchens and playgrounds.

In Pakistan, all non-state schools must register with the appropriate provincial authority to operate. In order to register, a school must fulfil multiple criteria and be inspected and approved by the relevant authority. Registrations have to be renewed: for example, every two years in Balochistan. In Khyber Pakhtunkhwa, legislation mandates registration renewals but does not provide a standard timeline. In Punjab and Sindh, complaints can be lodged against any school violating registration standards and strict penalties can be imposed, including cancellation of registration certificates.

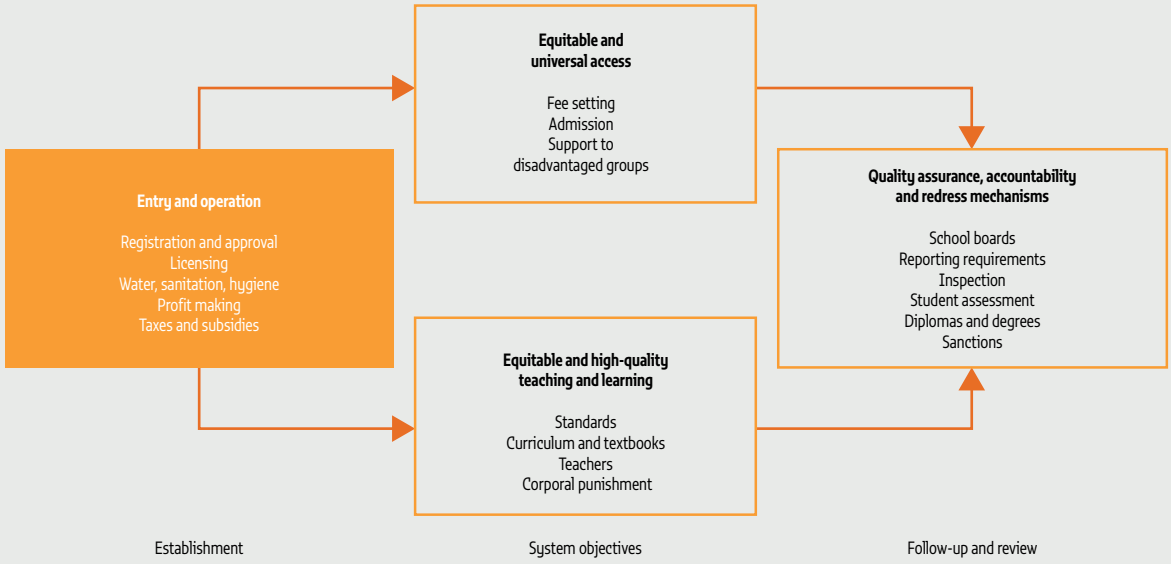
The process is very different for public–private partnerships. For instance, the Punjab Education Foundation offers incentives to individuals and organizations to set up schools, subject to basic conditions related to the applicant's education level and residence. The schools must be in areas with no formal school within a one-kilometre radius and serve a population of at least 350 people, as the aim is to reach populations that would not otherwise have access to school. Since 2007, more than 2,500 schools have been established in this way (Punjab Education Foundation, 2021).

QUALITY ASSURANCE AND SANCTION MECHANISMS ARE COMMON

Countries often determine the standards schools should meet, as well as potential responses to non-compliance, from warnings to sanctions. The most extreme forms of sanction, school closure and licence withdrawal, are also the most common, enacted in practically all countries. In Bhutan, most schools are subject to annual ministry assessments and students sit national examinations. If the ministry receives notice that a private school has failed to comply with any guidelines, it investigates the concerns, gives the school a written warning in cases of non-compliance, and may recommend suspension or termination of the licence and eventual school closure.

> The most extreme forms of sanction, school closure and licence withdrawal, are the most common, enacted in practically all countries

FIGURE 4.1:
Regulations cover a range of aspects of non-state activities in education



Source: GEM Report team.

TABLE 4.1
Regulations for non-state activity in primary and secondary education

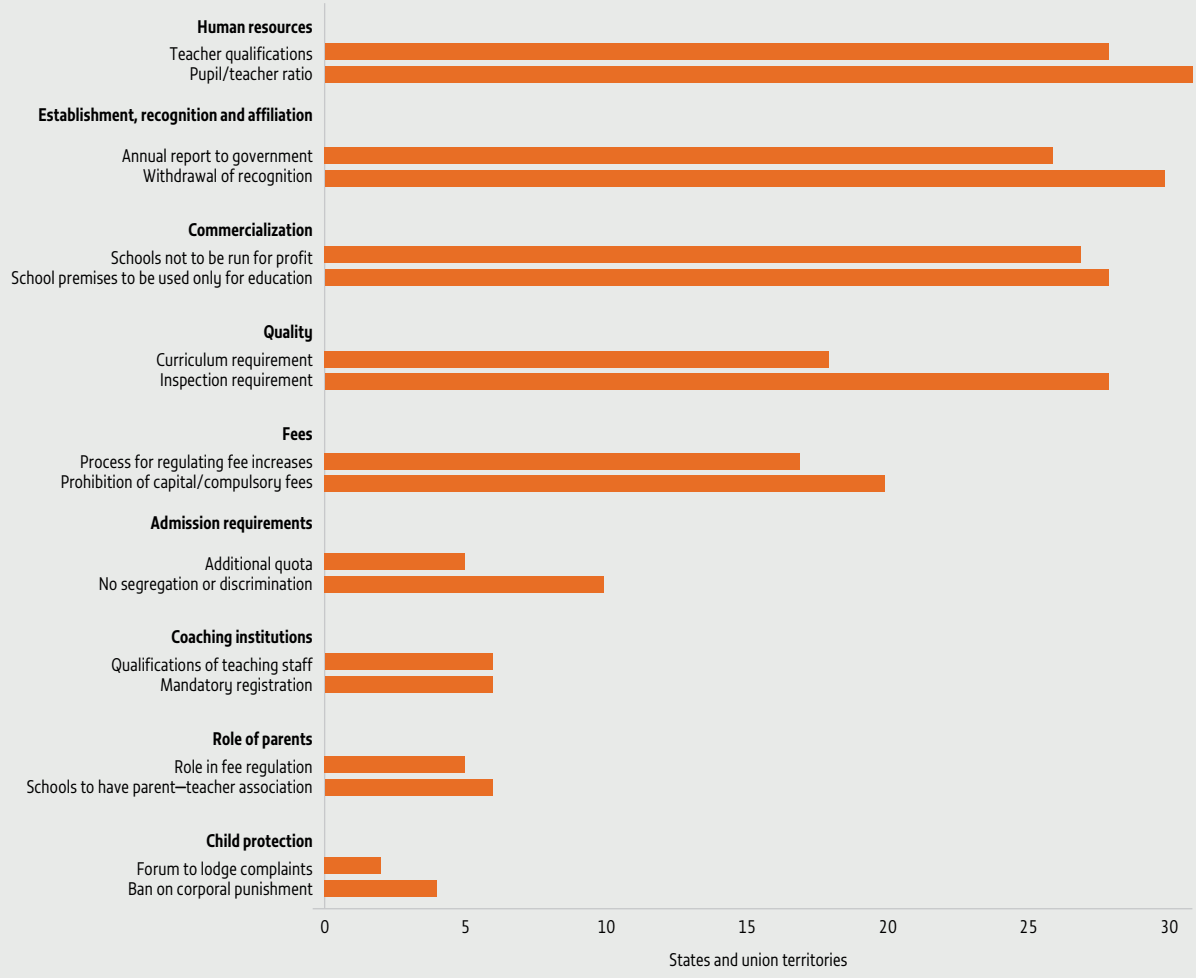
	Afghanistan	Bangladesh	Bhutan	India	Maldives	Nepal	Pakistan	Sri Lanka
Establishment: registration, approval, licensing	Yes	Yes	Yes	Yes	Yes	Yes	...	Yes
Infrastructure: land, building, classroom requirements	Yes	Yes	Yes	Yes	...	Yes	...	No
Infrastructure: single-sex toilets	No	No	Yes	Yes	...	Yes	...	No
Prohibition of profit making	No	No	No	Yes	No	Yes	No	No
Curriculum standards	Yes	Yes	No	...	...	Yes	Yes	Yes[1]
Teachers: same status for private and public teachers	No	No	No	Yes	...	No	No	No
Teachers: training and qualifications	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
Teachers: state accreditation	No	Yes	Yes	...	Yes	Yes	Yes	No
Inspection requirements	...	Yes		Yes	...	Yes		Yes[1]
Sanctions: closure for non-compliance/standards violation	...	Yes	Yes	Yes	...	Yes	...	Yes
Quotas for specific groups	No	No	No	Yes	...	Yes	Yes	No
Fees: early childhood education	Yes	...	Yes	Yes	...	No	Yes	No
Fees: primary and secondary education	Yes[2]	Yes	Yes[3]	Yes[2]	...	Yes	Yes	Yes[1]
Fees: tertiary education	...	Yes	No	Yes	...	No	Yes	No
Fees for specific groups: early childhood education	No	...	No	...	...	Yes	Yes	No
Fees for specific groups: primary and secondary education	No	Yes	No	Yes	...	Yes	Yes	No
Fees for specific groups: tertiary education	Yes	No	No	...	...	No	Yes	No
Subsidies or credits for fees	No	Yes	No	Yes	...	Yes	Yes	No
Subsidies or credits for non-tuition fees	No	...	No	Yes	...	No	Yes	No

Notes: 1. Only government-aided schools. 2. Yes, but unclear what type of non-state school it applies to. 3. Only independent schools.
(...) Not available. Data for the Islamic Republic of Iran were not reported.
Source: GEM Report team analysis based on the PEER country profiles on non-state actors in education.

FIGURE 4.2:

Indian states tend to have regulations on establishment and teachers but not on admission and coaching institutions

Number of Indian states and union territories with specific regulations, 2020



Note: Regulations were reviewed in 31 of 36 states and union territories.

Source: Mehendale (2020).

India's 2009 Right to Education (RTE) Act states that schools cannot be established or recognized unless they fulfil norms and standards. If non-compliance exceeds three years, the authorities must withdraw recognition, whereupon the owners are liable for substantial fines if they continue to run the school. In Karnataka state, the education minister threatened to close more than 1,400 private schools not in compliance with the act (Deccan Chronicle, 2014). In 2016, 1,170 private schools were shut down in Punjab state. The National Independent Schools Alliance, which represents 55,400 private schools across India, reported that more than 15,000 schools were given closure notifications for non-compliance between 2014 and 2018 (Iyer and Counihan, 2018).

At the tertiary level, countries in the region have been developing and strengthening quality assurance and accreditation mechanisms. Afghanistan developed its quality assurance framework in 2012 and extended it to non-state institutions in 2013 (Hatsaandh, 2022). In 2017, Bangladesh developed its accreditation framework to assess whether universities or

> In several countries in the region, teacher regulations are specified in more detail for public than for private institutions

programmes meet a minimum quality standard (Bangladesh University Grants Commission, 2018).

Most quality control frameworks in tertiary education are focused on inputs, including staff and facilities. These requirements often apply to both public and non-state institutions, though they can be stricter for non-state ones. In Bangladesh, the University Grants Commission recently proposed an amendment to the Private University Act 2010 to increase the minimum required space from 25,000 to 35,000 square feet of rented building (Jasim, 2021b). Private universities also face strict restrictions on students and personnel: In 2020, three universities were fined for admitting students beyond the allowed limit of 50 students per law faculty (The Daily Star, 2020).

Regulations often do not cover all parts of the education system. In India, accreditation of non-state institutions by the government is voluntary (Ravi et al., 2019). Sri Lanka's University Grants Commission Quality Assurance and Accreditation Council, established in 2015, covers private institutions with degree-awarding status, but not institutions that award foreign degrees or non-recognized institutions, and is not mandatory (Institute of Policy Studies, 2022).

PUBLIC AND PRIVATE TEACHER CERTIFICATION AND WORKING CONDITIONS OFTEN VARY

In several countries in the region, teacher regulations are specified in more detail for public than for private institutions. In Bangladesh, teacher standards vary by provider. The National Education Policy 2010 had proposed a commission to establish selection criteria for teachers in non-state primary schools and *madrasas*. Service regulations from 1979 establish criteria and standards for teachers in secondary non-state schools. At the university level, the National University regulates staff positions, promotion and firing decisions for private colleges, although the colleges have autonomy over salaries and can recruit staff certified by the Non-government Teachers' Registration & Certification Authority.

In India, the RTE Act expects teachers to meet minimum academic qualifications and pass an eligibility examination. State governments have required private schools to hire teachers with prescribed qualifications. In Haryana and Karnataka, the regulations also specify private school teachers' minimum salary. In Karnataka, private unaided institutions' maximum tuition fee is based on salary expenditure for teaching and non-teaching staff. Tamil Nadu specifies that private school teachers receive salaries and allowances on a par with state government schools (Mehendale, 2020).

In Pakistan, all teachers, from pre-primary to higher education, must comply with national professional standards, which include standardized certification and accreditation procedures and teacher training programmes. At the provincial level, the Private Educational Institutions Regulatory Authority is responsible for checking the qualifications, terms and conditions of service of any teaching staff hired by a non-state institution. In Sindh, there is no specific reference to teacher qualifications, but the provincial government must ensure that the teacher salary is commensurate with the fee structure of the institution.

In Sri Lanka, primary and secondary teachers are expected to have a bachelor's degree. Service conditions on recruitment, qualifications, responsibilities and salary are clearly specified for state school teachers but do not apply to teachers in the non-state sector. In Nepal, all teachers must have a teaching licence from the Teachers Service Commission and salaries cannot be less than the minimum scale provided by the government. Regulations on renumeration, allowance, leave, pension and other benefits differ between government and institutional (non-state) schools, but there are aims to better regulate teacher service conditions in institutional schools in the future.

> India and Nepal prohibit profit making

> Governments may try to reduce inequality in access to higher education through policies that offer financial support to students

REGULATING PROFIT MAKING IS NOT COMMON

The rationale for banning profit making in education is to ensure that education is not used as a means to entrench social and economic inequality. India and Nepal prohibit profit making.

In Nepal, schools registered as companies were originally allowed to operate for profit, while those registered as educational trusts cannot, with all their income maintained in a prescribed format and recognized by an official auditor. However, the 2016 Eighth Amendment Bill of the Education Act prohibited the establishment of schools as companies, requiring all new schools to be established as non-profit entities. Existing company schools could voluntarily change their status to a public or private trust. This recommendation is also outlined in the Act Relating to Compulsory and Free Education 2075 (2018), which states in addition that 'any school with private investment shall operate early childhood development and basic education to make it service-oriented and public welfare'. However, neither law makes conversion mandatory. In 2019, the High-Level National Education Commission stated that all institutional schools established as for-profit companies should convert to non-profit trusts within 10 years, starting in 2022, in order to 'stop the commercialization of education'. The commission argued this was necessary because many profit-making institutional schools were operating despite the 2015 Constitution and 2018 Compulsory and Free Education Act.

In India, schools are required to register as non-profit institutions. Almost all states rule that schools should not be run for profit and school premises should be used only for the purpose of education and skills development. In Himachal Pradesh, privately managed institutions cannot carry out commercial activities, including selling uniforms, ties, belts or badges. In Karnataka, private education institutions must maintain a list of their properties, and all funds collected need to be used only for prescribed purposes (Mehendale, 2020).

Bangladesh, Bhutan, India and the Islamic Republic of Iran regulate profit making in tertiary education. Bhutan prohibits for-profit universities but allows for-profit colleges. In India, all university assets must be used only to conduct academic, research and administrative activities. In Bangladesh, non-state universities must be registered as not-for-profit institutions (Wadud, 2021).

FEE REGULATIONS ARE OFTEN APPLIED TO NON-STATE ACTORS

Among the most common types of regulation applied to non-state actors are those related to fee levels. In India, these govern fee increases, fee use and prohibition of some fee types. In Andhra Pradesh, legislation prescribes how fees shall be allocated, with 50% expected to be earmarked for salaries. In Bihar, schools cannot increase fees by more than 7%; additional fees need to be justified and displayed on the notice board and official websites. The Fee Regulatory Committee can levy penalties on schools for violations and can recommend cancellation of the school's recognition. If guardians submit complaints, the committee can take decisions within 60 days (Mehendale, 2020).

Fewer countries implement regulations on fee caps, increases or uses in tertiary education. In Bangladesh, the University Grants Commission is proposing an amendment to the 2010 Private Universities Act that would allow it to set fees consistently across institutions (Jasim, 2021b). In Bhutan, private colleges must have their fee levels approved by the Tertiary Education Board (Schofield and Roder, 2022). In India, several states have fee regulatory committees (Muzammil, 2019). Such committees have determined, for example, the fees charged to at least 50% of teacher training institute students; the rest may be charged more than the stipulated fees (Centre for Policy Research, 2022). In Nepal, fee charging tends to be centralized in public universities, thus restraining fee levels charged in campuses controlled by non-state actors (Institute of Integrated Development Studies, 2022). In Pakistan, tuition fee level must be specified and pre-approved by the Higher Education Commission; any annual increase above 10% must be approved by the university chancellor.

SOME COUNTRIES SUPPORT DISADVANTAGED LEARNERS' ACCESS TO NON-STATE SCHOOLS

In India, the 2009 RTE Act requires private schools to reserve 25% of places for children from poor and disadvantaged groups and to reimburse their fees (**Box 4.1**). Nepal's 2018 Free and Compulsory Education Act requires private schools up to grade 12 to offer scholarships to 10% (for schools with up to 500 students), 12% (between 500 and 800 students) or 15% of their students (above 800 students) (Jha, 2019). However, private schools have contested the law and refused to comply with it (Singh, 2019). In Pakistan, the 2017 National Education Policy states that all for-profit schools must provide free education to at least 10% of their students, favouring 'deserving children'. Similar commitments were made in provincial laws in the Islamabad Capital Territory in 2011, Sindh in 2013 and Punjab in 2014.

Governments may also try to reduce inequality in access to higher education through policies that offer financial support to students. In Bangladesh, the 2018–30 Strategic Plan for Higher Education establishes that non-state universities must earmark 2% to 5% of their revenue for scholarships or grants (University Grants Commission of Bangladesh, 2018). In Bhutan, the government gives merit-based scholarships to students in the country's first private college and requires colleges to provide merit- or need-based scholarships to at least 10% of their students (Schofield and Roder, 2022). In Pakistan, 10% of students admitted to non-state tertiary institutions must be granted fee exemptions or scholarships based on need. Bhutan and Sri Lanka provide publicly subsidized loans to students attending non-state institutions. India provides scholarships to students in all types of institutions.

BOX 4.1:

In India, the ambitious equity objectives of the RTE Act provisions on private schools have not yet been met

Section 12(1)(c) of the 2009 RTE Act states that non-minority private unaided schools in India should reserve at least 25% of seats in entry-level grades for children from poor and disadvantaged backgrounds; state governments are to reimburse schools either the non-state school fees or the state school per child spending, whichever is lower.

This policy has had several implementation problems (Day Ashley et al., 2020); between 2010 and 2016, about one quarter of litigation under the act in high courts and the Supreme Court concerned it (Ambast and Gaur, 2017). State education departments have not had enough staff to inform applicants, process applications, monitor private school compliance with infrastructure and teacher norms, and deal with appeals (Mehendale et al., 2015). Schools have complained that reimbursements are slow, difficult to obtain and below expected levels, leading them to raise fees for the other students. It has also been argued that state governments underestimated the per-student cost in public schools and have not made their calculations public (Kingdon and Muzammil, 2018).

There is a lack of awareness of procedures for implementing the policy; moreover, application procedures and eligibility proof have been too complicated, sometimes giving rise to corruption claims (Mehendale et al., 2015). In many states, the admission process takes place through the computerized RTE lottery, which requires successful applicants to approach the schools designated for admission within one or two weeks. Despite trying to reduce schools' discretion in selecting applicants, the system requires computer proficiency and internet access and is thus a challenge for some families (Wad et al., 2017).

By 2021, only 16 of the 36 states and union territories were implementing the policy, according to the National Commission for Protection of Child Rights (Sharma, 2021). Maharashtra had 69% of reserved seats filled in 2020, the highest percentage, but only 41% of private unaided schools had registered for RTE admissions. The COVID-19 crisis exacerbated some challenges, with schools not allowing so-called RTE students to join online classes and opposing an order against fee collection during the lockdown (Sarasvati, 2020). Across India, it was estimated that 4.3 million children benefited in 2018/19, although Karnataka, Madhya Pradesh, Rajasthan and Tamil Nadu accounted for 68% of the total. In Uttar Pradesh, no more than 2% of seats were filled (Indus Action, 2018, 2019).

Schools appear to have invested little in ensuring integration of RTE students and there are concerns that they may be subject to patronizing attitudes and discrimination (Mehendale et al., 2015). However, there are indications of success in social cohesion (Joshi, 2020b) and the measure is generally perceived to have been positive, at least in low-fee if not elite schools. Some beneficiary children, while not among the poorest, appear to have ended up in schools they might otherwise not have had access to (Dongre et al., 2019). But concerns remain whether they will have the support they are likely to need in higher grades.

> In Bhutan, India and Sri Lanka, no licensing or registration is required to set up a private tutoring business and the sector is mostly unregulated

REGULATIONS LAG BEHIND IN PRIVATE TUTORING

The proliferation of private tutoring is a regulatory challenge for governments (Joshi, 2020a). In Bhutan, India and Sri Lanka, no licensing or registration is required to set up a private tutoring business and the sector is mostly unregulated. Private tutoring centres register under the Ministry of Economic Affairs in Bhutan, under the 1953 Shops and Establishment Act in India and as businesses under the Companies Act in Sri Lanka. Some Indian states do register coaching institutions: Six states mandate registration and teaching staff qualifications, five require minimum physical infrastructure and four have provisions for closure in the event of non-compliance. In Goa, fees are specified by the government via notification in the Official Gazette.

In Afghanistan, the Directorate of Private Education Institutions, established in 2017, was responsible for registering all private schools and tutoring companies (Hatsaandh, 2022). In Nepal, government permission is required for private coaching classes. Upper limits for fees are imposed and monitored by district education officers and all centres are required to reserve 5% of their seats for women, Dalits and learners with disabilities, and provide free lessons to them.

In Pakistan, Balochistan and the Islamabad Capital Territory require private tuition centres to be registered as private education institutions and to comply with minimum infrastructure standards applicable to non-state schools. The curriculum offered should be compatible with the formal school curriculum and centres are subject to regular inspections. Fee charges are also regulated so that centres offer a fixed rate, and centres are required to submit annual audited accounts.

A common regulation is the banning of schoolteachers from providing private tutoring, including in Bhutan, Bangladesh and some states in India. The 2019 National Education Policy of Bhutan emphasizes that teachers of both state and private schools are prohibited from providing out-of-school teaching services. In Nepal, teachers may be allowed to provide private tutoring organized by schools. In Pakistan, the Private Educational Institutions Regulatory Authority and the Balochistan Education Foundation regulate the qualifications, terms and conditions of service of private tutors.

There have been multiple instances of malpractice associated with unregulated private tutoring, such as fatal fires at facilities, misleading advertisements, leaks of examination papers in organized cheating rackets, charging of exorbitant fees and lack of grievance redressal mechanisms (Amer, 2018; BBC, 2019). This situation has led media, parents and student associations to urge governments to impose stricter licensing requirements for tutoring establishments and ensure that they meet quality and safety norms (Education World, 2019; Press Trust of India, 2020).

REGULATIONS ARE UNDER DEVELOPMENT IN SEVERAL FIELDS OF NON-STATE ACTIVITY

Most countries regulate pre-service teacher education programmes through centralized curricula and minimum qualification requirements for teacher educators in both public and private institutions (Sirois et al., 2021). In Afghanistan, the 2008 Education Law mandated that all private institutions must follow the centralized curriculum established by the Ministry of Education. In Bangladesh, India and Pakistan, teacher training programmes were designed to apply to both private and public institutions (Rahman, 2020). In India,

> Most countries regulate pre-service teacher education programmes through centralized curricula and minimum qualification requirements for teacher educators in both public and private institutions

the 2014 National Council for Teacher Education regulations, amended in 2019, specify the minimum qualification requirements and minimum number of instructors to be recruited in each discipline for both public and private teacher education institutions. Pakistan has developed accreditation standards that provide a framework for provision of distance pre-service teacher education applicable to both private and public institutions Pakistan (National Accreditation Council for Teacher Education, 2016). These frameworks do not apply to continuing professional development because such programmes are not considered minimum requirements (TISS, 2022).

Child safety and learning environment regulations are uncommon, despite the need for them. Corporal punishment is a major concern. In Bhutan, a 2010 Ministry of Education assessment found that 11 of 126 monastic schools used punishment such as beating, spanking and whipping. In India, a 2007 Ministry of Women and Child Development survey of children in 11 states found that at least half the girls had experienced some form of violence, including in private and religious schools (UNICEF, 2016). In Pakistan, sexual abuse in schools and *madrasas* has been a long-standing and pervasive issue (Zafar, 2020), with reports of police being bribed to not pursue justice against clerics (Gannon, 2017). Such behaviour is a particular challenge when the institutions are outside of education ministry jurisdiction.

Regulatory mechanisms for textbooks outside public institutions remain limited. In India, a committee of the Central Advisory Board of Education recommended that the central government introduce national guidelines so that the curricular materials in non-state schools would adhere to national policy aims and constitutional values. Currently, however, textbook-related regulation appears to be based on individual memoranda of understanding and on a case-by-case basis, with limited information in the public domain (Centre for Policy Research, 2022). The digitization of learning materials and the growth of education technology providers have remained largely unregulated (**Box 4.2**).

Regulations also lag behind new types of partnerships. In Bangladesh, both public and non-state universities are actively encouraged by the government to collaborate with industry in the form of collaborative research, contract research and consultancy. This encouragement does not come, however, with guidelines on transparency and ethics. Such guidelines are expected in the Strategic Plan for Higher Education 2018–30 (University Grants Commission of Bangladesh, 2018).

ENFORCEMENT OF REGULATIONS IS RIDDLED WITH IMPLEMENTATION CHALLENGES

Even if regulations are straightforward, enforcement does not follow unless government has the requisite capacity. In India, vacant posts and lack of training for regulatory functions means there is not enough trained staff to inform applicants, process applications, monitor school compliance and deal with appeals (Mehendale et al., 2015). An analysis of five states showed that 70% of district education officers and 42% of block education officers were in charge of more than one district or block (Aiyar and Bhattacharya, 2016). In the Delhi and Haryana education acts, every recognized school is supposed to be inspected at least once a year. However, there are no detailed inspection criteria laid down in the law. The Delhi Directorate of Education's Private School Branch randomly inspects only 60 of the territory's schools annually due to limited capacity (Centre for Civil Society, 2019). When asked about government officials physically inspecting their schools, school directors said this was not done once in a year in 7% of schools in Telangana, 15% in Andhra Pradesh and in Jammu and Kashmir, and 30% in Haryana (**Figure 4.3**). The low frequency was confirmed in a small sample of public and private school teachers surveyed for this report (**Figure 4.4**).

Effective regulation is thwarted by cumbersome rules. Since education is concurrently governed in India, federal and state policies can lead to mismatched guidelines and standards, making it difficult for providers to navigate them. For instance, there is

> "The digitization of learning materials and the growth of education technology providers have remained largely unregulated"

BOX 4.2:

Regulation of education technology providers in India is a blind spot

There has been major growth in education technology companies providing software that can be downloaded on mobile phones and other personal devices. In India, such companies developed through policies encouraging entrepreneurship, digital infrastructure and tax exemptions for the first three years of operation. They are set up as e-commerce providers and therefore do not come under the purview of education or private tutoring regulations. A new education technology company must fulfil three minimum conditions: Notify a nodal officer, provide for a grievance redressal mechanism and share accurate information on its products and services (Krishna and Sharma, 2021).

But the education technology start-up phenomenon has raised concerns about false marketing and advertising. A 2020 analysis found that 12 education technology companies had spent more than US$60 million on advertisements in print, digital and television channels. The University Grants Commission noted that several education technology companies were advertising degrees or diploma programmes in association with its recognized institutions, which is not permitted. In 2022, the commission announced actions against tertiary institutions running open and distance learning or online programmes under any franchise agreement (Sharma and Niazi, 2022). Misleading advertisements from start-ups include claims that children as young as age 6 could learn how to code using a particular software. The Advertising Standards Council of India has asked companies to take down at least five advertisements for violating the advertising code (Bhushan, 2021).

A new regulatory challenge is to address weak privacy and online safety of children, for example as regards security protocols in education technology applications that collect data from children. The 2019 Personal Data Protection Bill proposes that valid consent to data collection and storage should be provided by guardians or parents of minors (Charles and Jain, 2022). However, most of the activities concerned are accessed by children, who inadvertently consent to giving away sensitive information (Krishna and Sharma 2021).

The Ministry of Education has issued an advisory to parents and students, cautioning against false advertisements and the use of automatic debit payment options on platforms that are said to lure parents to subscribe by first offering free services (India Press Information Bureau, 2021). In response, education technology companies are aiming for self-regulation (Mishra, 2022). Some of India's biggest companies established the Indian EdTech Consortium in 2022 with the goal of developing their own code of conduct and providing a joint consumer grievance redressal system (Press Trust of India, 2022; Sharma and Niazi, 2022).

little information available on operational aspects of regulations such as those on teacher salaries and school fees. This is partly because government guidelines are quite broad in terms of suggesting minimum or maximum criteria. Interviews with private school teachers suggested that often it is the management committee of the school (not to be confused with a school management committee, which private schools are not required to form) that decides on salaries to be paid to teachers and the fees to be charged.

One important case is the reimbursement private schools receive from state governments for enrolling children under Section 12 (1)(c) of the RTE Act. Most state governments do not make the per-child expenditure public. Even the process of calculating per-student reimbursement amounts is opaque in most states (Sarin et al., 2017). Rajasthan maintains a detailed online portal through which all applications received under the act's provisions of 25% reservation and reimbursements for private schools are processed. The portal even includes the method of calculating per-child expenditure, along with actual values. However, it has not been updated since 2017/18. Uttar Pradesh's Basic Education Department also maintains a dedicated portal that provides all relevant information, including an online application option, a list of mapped schools, the admission process with required documentation, lottery results, and seat allotment results. However, there is no information available on how the per-child expenditure is calculated or the exact amount (Centre for Policy Research, 2022).

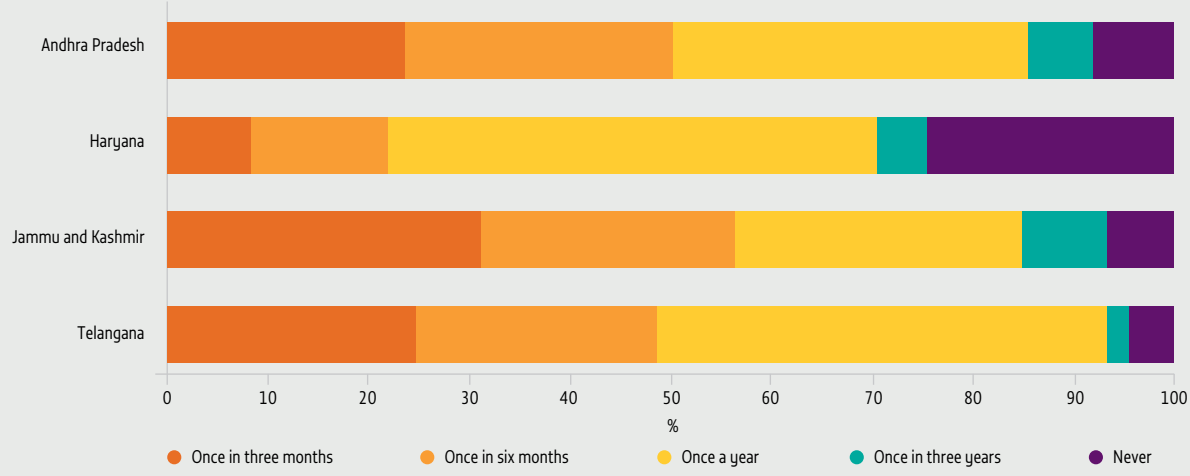
> "In Delhi, 28 certificates or approvals from 6 departments are needed to open a private school"

In Delhi, 28 certificates or approvals from 6 departments are needed to open a private school. These require submitting 125 documents: 29 for the essentiality certificate, 14 to secure approval of the scheme of management and 82 to obtain a certificate of recognition. Documents for the essentiality certificate alone include a copy of the memorandum of association and rules and regulations of the society, a copy of the society registration certificate, the list of governing body members, proof of no blood relationship among society members, a complete list of society members with biometric data and signatures, and an undertaking that the school has made provision for adequate drinking water and separate toilets for boys and girls. Obtaining the documents involves 16 officials from 3 separate Directorate of Education offices. The official estimate is that the process should take four months at most, but some cases have taken over five years (Centre for Civil Society, 2019).

FIGURE 4.3:

About 30% of private schools in Haryana were not even inspected once a year

Frequency of private school inspections, selected Indian states, 2021

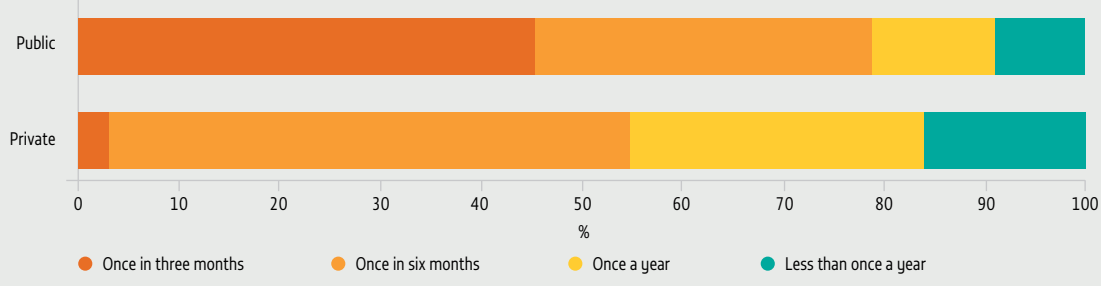


Source: Centre for Civil Society (2022).

FIGURE 4.4:

Public schools in India are monitored more frequently

Frequency of school monitoring by government officials according to teacher perceptions, selected Indian states, 2021



Source: Centre for Policy Research (2022) based on interviews with 65 public and private school teachers in six states.

Thus many schools remain unrecognized. In India, almost 4,500 schools were under threat of closure in 2015–18; 13,500 were served closure notices by a government authority and almost 2,500 were closed in 14 states for non-compliance with RTE Act norms. In 2019/20, significant numbers of unrecognized private schools, compared with other states, were reported in Assam (almost 7,500 schools, more than recognized schools) and Haryana (1,000 schools) (Centre for Civil Society, 2022). Regulation implementation practices in ancillary service provision can vary depending on context (**Box 4.3**).

Capacity challenges are also encountered in tertiary education. In Bangladesh, there were only nine officials working in the University Grants Commission's private university wing, which is responsible for monitoring the 108 private universities in the country (Jasim, 2022). The National University, which is responsible for the academic responsibility of over 2,000 state and non-state colleges, has only a small inspection unit. Moreover, concerns have been expressed that inspections do not address quality of teaching and learning and neglect student or faculty feedback (World Bank, 2019). Transparency International Bangladesh found various types of continuing irregularities, including new departments introduced without the required commission approvals, unlawful outer campuses, appointment of family members to boards of trustees, university fund transfers to trustees' accounts, use of funds for non-university businesses and undue influence on government. The commission's lack of capacity to regulate private universities attests to a lack of political resolve to pursue the aims of private education expansion (BRAC, 2022).

In Nepal, the Tribhuvan University Act grants the university the power to affiliate campuses and establish infrastructure norms for technical faculties in medicine, engineering and information technology. The Ministry of Education, Science and Technology, however, claims that these responsibilities lie with the ministry. This ambiguity has been blamed for the lack of adequate medical science colleges. The absence of an overarching legal framework for higher education is also seen as discouraging private investment in the country (Institute of Integrated Development Studies, 2022). In Pakistan, the reach of regulatory authorities or agencies is limited, particularly as training is often inadequate. Insufficient oversight means many courses remain unaccredited (Welch, 2021).

In India, quality assurance of teacher training institutes has been devolved to states, but many have not implemented state-level guidelines and human resources are insufficient for inspections, leading to significant delays in accreditation processes. Interviews at five private teacher education institutes, in Himachal Pradesh, Punjab, Rajasthan and Uttar Pradesh, showed that the accreditation process involved an on-site inspection of infrastructure and facilities. While guidelines stipulate the accreditation process should be completed within a year, only the respondent from Uttar Pradesh reported getting recognition within that period, while one respondent reported the process lasted five years (Centre for Policy Research, 2022). In 2012, the Justice Verma Commission report noted that such lags were caused not only by institutes' delays in addressing deficiencies but also typically by late receipt of recommendations by state governments and delays in inspections due to lack of human resources and committee members not working regularly (India Ministry of Human Resource Development, 2012).

In 2011, only 2% of all teacher education institutions in India were monitored. The 2019 Kasturirangan Committee report on the draft National Education Policy noted that many of these institutions were 'functioning as commercial shops where even the minimum curricular or course requirements are not met, and where degrees are essentially available for a price'. Most teacher education institutes fail to meet National Council for Teacher Education norms on minimum number of teachers, and private institutes have adopted corrupt practices to escape scrutiny (Azim Premji University, 2021).

Capacity challenges also plague TVET and adult education regulation. Nepal's accreditation system is overloaded, with 400 to 500 providers awaiting licence renewal (Institute of Integrated Development Studies, 2022). In Sri Lanka, a large number of private providers are neither registered nor accredited (UNESCO-UNEVOC and Sri Lanka Tertiary and Vocational Education Commission, 2018). Cumbersome accreditation procedures and delays in issuing certification have discouraged TVET institutions from obtaining formal accreditation (Sri Lanka

“Capacity challenges also plague TVET and adult education regulation”

BOX 4.3:

The regulation of ancillary services varies widely in India

A range of services are offered by private providers in India, but their regulation varies greatly, largely as a result of the reasons and motivations for their expansion.

Unlike textbooks used in government schools, which are closely monitored, textbooks used in private schools are not. No structures are in place to regulate private publisher textbook production. In the case of private supplementary tuition, local and state officials interviewed for this report said that, while regulation of providers was essential to maintain service quality, they believed a separate, dedicated team was needed for this task. Of 23 block and district education officers interviewed, 15 believed they did not have adequate human resources. When asked whether supplementary services were regularly monitored in their block or district, 13 reported that either they did not know about monitoring or it was not taking place. Most officials did not think such monitoring fell within their roles and responsibilities (Centre for Policy Research, 2022).

By contrast with other types of ancillary services, a compliance analysis found robust regulatory and monitoring mechanisms for the midday meal programme. Almost all local officials noted that there were mechanisms in place to ensure that food is provided for 200 days. Guidelines specifically mention that no profit is allowed in service provision and that rules for entry, operation, transparency and accountability were explicitly and carefully laid out. The exceptional case of midday meals is a result of long-time civil society activity. The programme emerged out of the 2013 National Food Security Act, which was a product of a large, concerted civil society movement.

National Education Commission, 2018). Non-state adult literacy programme providers in Afghanistan said in interviews that signing a memorandum of understanding with the government took so long they had to continue their work while waiting for the process to be completed (Hatsaandh, 2022).

PUBLIC–PRIVATE PARTNERSHIP MECHANISMS HAVE EXPERIENCED CHALLENGES, ESPECIALLY IN TVET

Public–private partnerships have been touted as creating favourable conditions for non-state engagement in sectors such as education that are characterized by high financial risk and low return (LaRoque, 2008). They have been identified as a key instrument for private-sector cooperation and mobilizing new resources to improve training. But the mechanisms need to be monitored.

In India, beginning from the 12th Five Year Plan 2012–17, the state has consistently promoted public–private partnerships to improve quality. The School Excellence Program was implemented by the Municipal Corporation of Greater Mumbai in collaboration with the Naandi Foundation, the Kaivalya Education Foundation, Save the Children and McKinsey with funding from UNICEF and the Michael & Susan Dell Foundation. The project was shut down, as learning outcomes failed to improve, indicating the fragility of such approaches and the need for evaluation of partnerships involving spending public money on private providers.

The NITI Aayog three-year action plan has recommended handing over 'non-performing' public schools to private players. Risks are involved in such handover processes if they are not properly monitored. In Punjab state, the Sukhsagar Avenue Welfare Association, responsible for the management of three Adarsh Schools in Faridkot, was found guilty of charging students for textbooks which should have been provided for free, creating fake firms to claim bills and receiving salaries against fake appointments. In addition to fund misappropriation, regular government teachers in these schools were paid only 50% to 60% of their salaries, despite the schools being reimbursed the full amount by the government (RTE Forum, 2020).

In Bangladesh, public–private partnerships have been implemented in specific sectors but the outcomes have not always met expectations. A study of five public TVET institutions showed that, while private companies were interested in maximizing their profit, less attention was paid to providing an adequate learning experience. Providers struggled with offering employment services to trainees due to limited capacity. The two sides failed to meet regularly in management

committees as originally agreed. Lack of coordination and administrative support also compromised success. As a result, some activities were discontinued (Bangladesh Ministry of Education and ILO, 2019).

Under the Pakistan TVET Sector Support Programme, some provinces have set up agreements to mobilize private resources. Competitive training skills development funds were open to public–private partnerships in Punjab and Sindh. In Punjab, the fund supports institutions targeting students in vulnerable situations, while Sindh finances programmes that prove to be demand- and market-oriented (Béteille et al., 2020). Yet funding and regulatory shortcomings persist, hampering the programmes' potential. Financial contributions from non-state actors are lower than expected. Donors and the government have had to intervene to revitalize the partnership in Punjab. While Punjab can rely on a regulated planning and monitoring mechanism, other provinces, including Balochistan, Khyber Pakhtunkhwa and Sindh, reportedly have weaker regulatory systems. Overall, conditions enabling companies to participate in managing and implementing TVET initiatives are still considered unfavourable (ITA, 2022). The experience of India suggests conditions under which public–private partnerships can succeed (**Box 4.4**).

REDRESSAL MECHANISMS ARE OFTEN INADEQUATE

In the region, redressal mechanisms often do not apply to all education providers or have been judged as inadequate. An analysis of the grievance redressal system in Karnataka, India, in September 2013 found that, under the Karnataka State Commission for Protection of Child Rights, several local authorities had the power to handle redressal issues. However, there were no jurisdictional demarcations among local authorities, which led to overlapping authority, the burden of a large range of cases from minor to severe, and major discretion linked to grievance redress solutions. None of the complaints were effectively resolved and interviewed parents expressed frustration at how public hearings were conducted.

Redressal mechanisms cannot be used for institutions outside of education system jurisdiction. In Sri Lanka, the regulatory structure that governs international schools is problematic. Out of the 389 international schools as of 2019, 382 are registered as private businesses under the Companies Act (Central Bank of Sri Lanka, 2020) and do not come under the purview of the recognized school regulation framework of the Ministry of Education (Wettewa, 2015). Due to the absence of regulations governing minimum standards, there are school environment and quality concerns. Several incidents have been reported where parents had no means to report serious issues in need of redressal, such as corporal punishment, misuse of funds and hiring of unqualified teachers. Some of these schools are known to base their staff selection on teachers' English proficiency instead of their pedagogical knowledge (Raymond, 2019).

Getting redressal for online tutoring services is even tougher, since such services are not registered with education authorities. For instance, Byju's has received criticism for its aggressive sales strategy, where parents are contacted to convert to paid subscriptions after a trial period. It has also been criticized for its poor work culture, with employees leaving the company due to it imposing unrealistic targets for the number of parents who pay for subscriptions each day (India Ministry of Education, 2021).

PROVIDER EXPERIENCES NEED TO BE REFLECTED IN BETTER REGULATION

Non-state providers of education goods and services may view regulatory mechanisms as burdensome, even as the providers themselves are perceived as obstructing implementation. Better regulation, reflecting the experiences of education providers, would improve implementation and the overall governance of non-state education activities.

SOME PROVIDERS ARE RESISTANT TO REGULATION

Interviews with government officials in the region suggest that one factor limiting the successful implementation of regulatory frameworks is providers' lack of intent. In Afghanistan, the Ministry of Education requires private schools to submit a detailed annual report on their activities, achievements, income and

> "Getting redressal for online tutoring services is tough, since such services are not registered with education authorities"

BOX 4.4:

India's National Skill Development Corporation provides lessons from its challenges and success

The National Skill Development Corporation (NSDC) is a public–private partnership that has shaped skills development in India. Set up in 2009 to catalyse more funding through the National Skill Development Fund and expand and improve vocational education and training, the NSDC evolved into an autonomous and flexible mechanism. The NSDC is the outcome of a series of reforms that envisaged a change in the role of the state from a service provider to a facilitator of private-sector involvement in training provision. The 11th Five Year Plan 2007–12 and the 2009 National Policy on Skill Development prioritized this approach.

Private-sector providers grew exponentially, mostly encouraged by the NSDC incentives, which covered three quarters of costs for the first three years. However, a 2015 evaluation described shortcomings. Concerns were raised about the quality of TVET provision and the effectiveness of a market-led model. The reliance on government funding was strong. The involvement of corporate representatives, through the establishment of numerous sector skills councils, did not translate into actual employer contributions and ownership over the training content. The short duration of vocational courses was considered ineffective in ensuring training-to-work transition (Mehrotra, 2018).

The NSDC was relaunched in 2015, when it was identified as the main instrument to achieve the goal of providing 400 million youth with skills over a decade. Changes in monitoring of training and fund accountability after 2015 are viewed as a turning point. With a change in leadership, day-to-day decisions came to the Ministry of Skill Development and Entrepreneurship for approval, removing the NSDC's previous autonomy and flexibility. Training figures reported by the NSDC were checked by ministry officials. While these measures initially led to tensions and mistrust, they helped define the role of each actor more clearly in terms of regulatory oversight and implementation. This new phase is viewed as having helped the NSDC successfully balance scaling up private sector engagement in skills development with government accountability and oversight.

The NSDC has evolved over the years to respond to multiple needs and serve multiple functions. It manages proposals for short-term training courses and sets standards for the disbursement of government soft loans to providers. As an implementation agency, it has been responsible for rolling out skills development programmes and for related monitoring and evaluation activities. It has expanded the capacity of training institutions in India and has mobilized over US$430 million through the National Skill Development Fund, training over 25 million people (UNESCO New Delhi, 2020).

Quality and equity considerations, related to gender and students dropping out, were included in the NSDC monitoring mechanisms and taken into account for resource allocations. In 2020, the NSDC published a first gender analysis of short-term courses, which examined the employment outcomes of girls and women who had participated in these training opportunities. In 2021, the ministry approved new monitoring guidelines for training providers and implementing agencies, institutionalizing the approach. Data disaggregated by demographic and socioeconomic characteristics, including gender and disability, are expected to inform corrective measures.

Source: Nambiar (2022).

needs, but only some 20 of more than 2,100 schools did so (Hatsaandh, 2022). In India, the exemption of minority institutions from the RTE Act provisions to reserve 25% of seats for disadvantaged students has been abused (**Box 4.5**). In Nepal, the government, in consultation with institutional schools, issued a directive on their standards and operations in 2013 to ensure they are properly regulated. However, the monitoring mechanism was not effective and private schools were not complying, refusing to pay a 5% education tax and to stop fee increases for three years (Bhatta and Pherali, 2017).

In Bangladesh, as of 2022, only 11 of 108 private universities fulfil the stipulated governance arrangements, 46 have not obtained the required permanent certificate and none had submitted their financial report by the 2021 deadline (Jasim, 2022). Only one in four operating non-state TVET institutions has recognized the National Technical and Vocational Qualifications Framework as a model of skills development, thus challenging effective implementation of the quality assurance mechanism (Nesterova and Capsada-Munsech, 2021).

Efforts to regulate private tutoring in India, with respect to registration, infrastructure, tax or fees, have also been resisted. The 2016 Private Coaching Centres Regulatory Board Bill has not been enacted (Goyal, 2019). In a more recent example, a private tutoring bill in Sikkim state aims to comprehensively regulate the industry but has also not been passed. Multiple instances of fires in tutoring centres led the Delhi government to develop

BOX 4.5:

The exemption of minority institutions in India from the 2009 RTE Act's equity provisions has been abused

One reason why the 2009 RTE Act objective for private schools to reserve 25% of their seats for disadvantaged children has not been achieved (Box 4.1) is the exemption of minority institutions. In 2012, a landmark case challenged Section 12(1)(c) on the grounds that it was an unreasonable restriction for business. The Supreme Court upheld its constitutional validity but exempted minority schools to help them preserve their language and culture (Srivastava and Noronha, 2014). In 2014, the ruling was again challenged, and the court held that even aided minority schools were exempt from coverage. It clarified that schools run by minority institutions would have to grant free admission to poor children under the act if their application for minority status had been rejected or they had not applied at all. After minority schools in Gujarat refused admissions, citing pending minority status applications, the state government filed an application seeking clarification as to whether such schools were exempt from the act's norms. While all minority institutions were contesting a legal battle in the Supreme Court, 117 schools in Gujarat refused admission to 2,090 students in 2018 who had been assigned to these schools (Times of India, 2019).

In 2020, the National Commission for Protection of Child Rights analysed almost 23,500 minority schools and found that 63% of their students came from non-minority communities. The lowest share was in *madrasas* while the highest was in Christian schools, 74% of whose students were non-Christian. Only 8% of minority children were being educated in minority schools. Furthermore, only 9% of total students in minority schools belonged to socially and economically disadvantaged groups. While the preservation of distinct language and culture was the reason for exemptions, many minority schools had become 'cocoons populated by elites' (NCPCR, 2021, p. 9). Rapid growth in issuing minority status certificates first came after registering minority schools became easier in the second half of the 2000s; there was another increase in the first half of the 2010s, likely linked to the Act 2012 and 2014 exemptions for minority institutions (**Figure 4.5**).

FIGURE 4.5:

Minority institution registration increased further after the RTE Act was passed

Issuance of minority status certification to schools, by minority type, 1950–2020

Source: NCPCR (2021).

a policy focused on safety norms, but these efforts have also been thwarted (Press Trust of India, 2020).

PROVIDERS VIEW REGULATIONS AS A CHALLENGE RATHER THAN A SUPPORTIVE FRAMEWORK

School proprietors in Bangladesh who were interviewed for this report argued that the heavy regulatory burden should be reduced (BRAC, 2022). This sentiment reflects opinions throughout the region. Many non-state providers highlight the dangers of what they consider excessive or unreasonable regulation.

In India, private school advocates characterize the regulatory landscape as heavy-handed, preventing them from fulfilling their roles effectively. Many proprietors point out that compliance with several standards would massively increase per-student expenditure for low-fee schools; hence, they do not want to be recognized and therefore regulated (Centre for Civil Society, 2022). In Jharkhand state, an audit of four districts found that 352 of 547 private schools applied for recognition in 2013–15, but only 101 met the requirements and as of mid-2016 their proposals were caught in a bottleneck at the Directorate of Primary Education. In Gujarat state, four years after the 2012 state RTE rules took effect, more than 2,000 independent private schools were operating without a certificate of recognition (India Comptroller and Auditor General, 2017).

In Nepal, private school owners complain about unnecessary government regulations, arguing that government policies for private schools are unclear and, as a result, providers endure unnecessary pressure (Sharma Poudyal, 2017). In Pakistan, concerns have been raised about politics, no-objection certificates, law and order, school closures and delays as factors impeding the operation of non-state institutions (ITA, 2022).

In Bhutan, although the government has called for tertiary non-state sector expansion, the 2012 Rules and Regulations for the Establishment of Colleges, revised in 2017, require that colleges have 15 acres of contiguous or near-contiguous land, a difficult and expensive condition in urban areas. Institutions must also provide housing for half of their staff, two volleyball courts of standard international size and even library cubicles for postgraduates even if the institutions do not offer this level of education (Schofield and Roder, 2022).

Introducing regulations without adequate support burdens providers. In Pakistan, an armed attack on a school in Peshawar resulted in strict regulatory measures. Like others, private-sector institutions needed to follow a 15-point school safety plan and the Pakistan School Safety Framework. Infrastructure requirements, such as closed-circuit television cameras, barbed wire, security plans, guards and monitoring equipment, imposed a heavy financial burden (Malik and Hussain, 2022).

Taxes can be viewed as unfair. In Afghanistan, taxes include gross or net income taxation and annual licensing fees paid to the Ministry of Commerce and Industry. Early childhood education centre proprietors have argued that the government needs to revisit these taxes if it wants to build demand for such services (Hatsaandh, 2022). Trust schools in Nepal, which are non-profit, have to pay a 25% tax rate on any surplus revenue, just like private schools (Institute of Integrated Development Studies, 2022). In Pakistan, proprietors noted that having to pay full taxes, like regular businesses, ultimately results in higher user fees and thereby reduces access to poorer students (ITA, 2022).

Some proprietors argue that not allowing profit is a poor signal to those who want to invest in the sector. In India, the profit ban arguably creates obstacles for low-fee private schools, reduces investment and encourages corruption (Centre for Civil Society, 2022). In Nepal, 30% of surveyed institutional school principals and founders preferred being registered as non-profit companies. But nearly 45% preferred being for-profit companies so as to exercise autonomy over fees charged and be governed through distinct regulations to allow competitive market practices (Bhattarai et al., 2016).

Teachers working in private schools provide a different take on regulatory burden. In Nepal, teachers in institutional schools reported not being paid as per regulations and wanted stricter monitoring and compliance (Sharma Poudyal, 2017). There is a clear lack of political will to implement the regulations; one explanation is that many influential government

> “Many non-state providers highlight the dangers of what they consider excessive or unreasonable regulation”

> Introducing regulations without adequate support burdens providers

officials have a financial stake in institutional schools (Institute of Integrated Development Studies, 2022).

Faith-based institutions face particular registration dilemmas. In Pakistan, regulatory efforts began with a 2001 ordinance resulting in only 449 of 25,000 *madrasas* registering. A 2002 ordinance could not be formally promulgated due to strong resistance from *madrasas* (Zaidi, 2013). While the government focused on mainstreaming *madrasas*, the religious community was concerned about a potential hidden agenda of modernization (Rabbi and Habib, 2019), fearing a diluted focus on religious education and attempts to change curricula and financial control (ITA, 2022).

In the Islamic Republic of Iran, a certificate from the Herasat, the office of ideological and political control and surveillance, is required to request authorization to open a non-profit school. Moreover, school and university proprietors expressed feeling pressure from families who adhere to the official ideology and could denounce activities that may be perceived to be incompatible with it. For instance, photos of private kindergartens that offered artistic dance, music and sport activities for boys and girls were made public, leading to an intervention to ban them (Paivandi, 2022).

Regulation requirements can lead to corruption

In some cases, excessive requirements that cannot be easily met become a vehicle for corrupt practices. In Afghanistan, a 2019 Independent Joint Anti-Corruption Monitoring and Evaluation Committee report found most private schools were unable to meet the numerous regulatory requirements (e.g. depositing 10% of the school's estimated annual income as security in a bank, having one toilet per 50 students, being located at least 500 metres from the nearest public school), resulting in illegal arrangements with supervision personnel (Hatsaandh, 2022). In Pakistan, corruption in regulation emerged as a common theme in key informant interviews. Registration and inspections are based on designated officials' visits and reports.

Some officials are reported to take bribes to issue favourable reports, allowing non-state providers to circumvent some regulations for a cost (ITA, 2022).

Proprietors in India have reported paying excessive costs. In a review of four states for this report, 80% of recognized low-fee private schools in Telangana, 72% in Andhra Pradesh, 43% in Haryana and 35% in Jammu and Kashmir reported having to pay more than what was officially required to obtain recognition. Low-fee private schools have struggled particularly with getting no-objection certificates linked to school safety. In several states, schools need to obtain a fire safety certification from the fire officer or agency. In Haryana, meeting such requirements is difficult because of school location; for instance, fire trucks are unable to enter the narrow lanes where many schools are situated. In Andhra Pradesh, a school owner reported that recent fire safety certification cost some INR 200,000 officially and more unofficially. In Jammu and Kashmir, schools need to obtain similar no-objection certificates from the Fire and Emergency Department. School owners raised concern that these rules were imposed retroactively and were difficult for schools to meet once a building was constructed.

Schools in Jammu and Kashmir faced problems obtaining chemical lab safety certificates from the subdivisional magistrate, school building safety certificates from the Public Welfare Department and other approvals from the traffic police and local bodies. Schools described their files being stuck in the approval process for at least one to two years. Apart from paying official and unofficial money for certification, schools need to constantly renew no-objection certificates they have already obtained, due to this time-consuming process (Centre for Civil Society, 2022).

Recognized schools often need to renew certifications. In Andhra Pradesh, recognition is valid for 10 years. By the end of April every year, the education agency needs to file an affidavit confirming that there is no deviation from or violation of prescribed norms

> In some cases, excessive requirements that cannot be easily met become a vehicle for corrupt practices

and rules. In Haryana, private schools also need to renew recognition every 10 years. In both states, schools reported that this rule had changed and schools needed to apply for renewal every three to five years, a practice also reported in Jammu and Kashmir (Centre for Civil Society, 2022).

Regulations sometimes discriminate against private institutions

In India, state functionaries are vested with multiple and overlapping functions, including regulation, service delivery, financing and assessment (Anand and Sudhakar 2020). In Maharashtra, a district education officer must oversee implementation of Samagra Shiksha Abhiyan, the main service delivery programme, but also follow up on allegations of employee misconduct and misbehaviour, which is a regulatory function. The National Education Policy 2020 recognizes that such issues stem from powers being overconcentrated. It has proposed the establishment of an independent regulator for school education that takes away the regulatory function from the state education departments. The regulator would establish a 'minimal set of standards based on basic parameters (namely, safety, security, basic infrastructure, number of teachers across subjects and grades, financial probity, and sound processes of governance)', to be followed by all schools.

School owners interviewed for this report requested uniform treatment of all schools. In Bhutan, the government is expected to expand access to higher secondary education (grades 11 and 12) and has given existing private proprietors a two-year transition period. It is paying private schools to educate students that it cannot accommodate in existing government schools. However, private schools will then need to figure out how to manage financially. The decision has proven controversial. After the policy was announced, some private secondary schools offered to sell their facilities to the government, while others were considering becoming primary schools (Seldon, 2019).

Regulations are regarded as particularly unfair if they are stricter for non-state institutions than for state ones or if the same standards are not equally enforced. In Maldives, non-state institutions – but not their state counterparts – are required to submit a list of professors and students with their qualifications prior to every new intake and a list of graduates with their results prior to graduation for approval from the Maldives Qualifications Authority (Shougee and Shareef, 2022). In Bhutan, non-state providers report that not all public institutions meet the detailed list of infrastructure requirements imposed on private colleges (Schofield and Roder, 2022).

CONCLUSION

State and non-state institutions should be governed through a coordinated mechanism and under one regulatory umbrella to ensure cohesiveness and minimum acceptable standards for all schools, students and teachers. In reality, education system governance is fragmented across multiple ministries and institutions, which means students are not all guaranteed such equal conditions.

Existing regulations have gaps in their design. Most governments have different rules for state and non-state actors. Analysing the existing landscape of regulations shows that attention is mainly on requirements for establishing institutions and for teacher qualifications, with far less focus on improving quality or equity. At the same time, many aspects of education systems where non-state actors are dominant are under-regulated.

Existing regulations also have important gaps in their implementation and enforcement. Due to constrained government capacity and distrust from providers, many institutions remain unregistered. Regulatory processes are viewed by providers as cumbersome, limiting institutional flexibility.

“Regulations are regarded as particularly unfair if they are stricter for non-state institutions than for state ones or if the same standards are not equally enforced”

Archana, 5, learns colours and counting using the Magic Bag, with the help of her mother, Lalsari, 25, at home in Nepal.

CREDIT: Save the Children

CHAPTER

5

Finance

KEY MESSAGES

- Government funding to non-state providers is limited and often delayed. In Bangladesh, 28,000 non-state institutions under the monthly pay order system rely primarily on these funds, which are insufficient to ensure minimum quality standards.
- Some governments focus on increasing investment in the state system to meet equity and quality objectives instead. In Delhi, government funding for schools and higher education institutions nearly tripled between 2015/16 and 2020/21.
- Some governments support non-state tertiary institutions. To facilitate additional funding, Sri Lanka's government wants to establish a 'free education investment zone' to attract foreign investors and branch campuses from foreign universities.
- Government allocations for early childhood are very low, leading to government efforts to facilitate external financing. In the Islamic Republic of Iran, the government leases or sells excess land and buildings and allocates annual subsidies to non-state providers to build and maintain preschools.
- Donors are significant influencers of non-state education provision. In Pakistan, the World Bank and the United Kingdom have played a key role in supporting publicly financed, private for-profit schooling.
- Corporate and philanthropic activity has increased in the region, with specific corporate social responsibility measures. Corporate social responsibility funding on education tripled between 2014-15 and 2019-20 in India. However, such funding remains a weak substitute for lost corporate and wealth taxes necessary to strengthen education systems.
- In South Asia, households account for the largest share of total education spending (38%) among all world regions. Their share is particularly high in Nepal (50%), Pakistan (57%) and Bangladesh (71%). In 2017/18, households spent over five times as much on private aided and unaided schools as on government schools in India.
- In South Asia, according to the 2014 Global Findex Database, 13% of families saved and 8% borrowed money to pay school fees. In Bangladesh, around a third of families borrowed to allow their children to study at private polytechnics that on average require 40% more out-of-pocket contributions to cover tuition fees.
- COVID-19 became an opportunity for technology use in education. In 2020, India's education technology sector received US$2.1 billion in investments, compared with US$1.7 billion in the 10 previous years combined.
- Private unaided institutions, which overwhelmingly rely on parental fees and were already in a precarious financing situation, took a heavy hit during COVID-19. In India's Haryana state, the percentage of schools with a default rate above 30% rose from 56% to 87%. Schools are reported to have closed and students to have left. According to the Annual Status of Education Report, the share of 6- to 14-year-olds enrolled in public schools in rural India increased from 64% in 2018 to 70% in 2021.

Government financial support to non-state schools is limited 95
Many donors and foundations support non-state activity 99
Households end up bearing too large a share of education costs 103
COVID-19 had a strong financial impact on non-state providers 113
Conclusion 118

As described in the introduction, public education has historically been underfunded in the region. In this context, and faced with the growth of non-state provision, many governments have grappled with whether to fund non-state providers and, if so, how to ensure that such funding can be effective and equitable. The urgency of these questions has further been brought to the fore by the disruptions caused by the COVID-19 pandemic.

This chapter analyses education financing in the region, with special reference to governments' role in funding private education institutions through mechanisms including public–private partnerships. It analyses household contributions and their consequences for inequality; households pay more out of pocket for education in South Asia than in almost any other world region. Meanwhile, as philanthropic actors gain influence, their methods and motives are examined, as are those of donors who fund non-state activities.

GOVERNMENT FINANCIAL SUPPORT TO NON-STATE SCHOOLS IS LIMITED

South Asian governments vary in the extent to which they subsidize private schools, contract out public school management and finance students to attend the school of their choice. Government aid to non-state schools comes in various forms. In South Asia, most governments make general direct payments to schools, such as per-pupil subsidies or grants, or specific payments for operating expenses, such as textbooks or technology equipment (**Table 5.1**).

Private aided institutions – privately managed institutions that receive public funds for some operational components, such as teacher salaries – are prominent in Bangladesh (**Box 5.1**) and in India, where a minority of private schools have received grant-in-aid and explicit or implicit subsidies since the 1970s. Overall in India, 6% of primary and secondary schools – but as much as 22% in Maharashtra, 28% in Meghalaya and 43% in Kerala states – were classified as 'government aided' in 2019/20, receiving grants for teacher salaries (India Ministry of Education, 2021). A large number of *madrasas* are state funded in Assam, Bihar, Chhattisgarh, Madhya Pradesh, Uttar Pradesh and West Bengal.

Over time, private aided institutions in India have become similar to government schools through teacher recruitment by teacher service commissions and mandates to charge no fees (Aslam and Kingdon, 2021). Only six states cover expenses beyond tuition reimbursement, such as textbooks, stationery, uniforms and transport. In Andhra Pradesh, following a committee's recommendations to withdraw the grant-in-aid programme and absorb staff into government institutions, the government decided in late 2021 to take over management of private aided schools and colleges, concerned about the quality of service in these schools (Janyala, 2021). According to media reports, views varied, with some schools expressing willingness to be absorbed and others noting resistance from parent associations, even launching legal cases to oppose the proposal (Edex Live, 2021). Similar concerns about the quality of non-state provision and its impact on equity have led other states in different directions (**Box 5.2**).

> In South Asia, most governments make general direct payments to schools, such as per-pupil subsidies or grants, or specific payments for operating expenses, such as textbooks or technology equipment

TABLE 5.1
Governments in South Asia provide some aid to non-state schools

	Bangladesh	Bhutan	India	Iran, Isl. Rep.	Maldives	Nepal	Pakistan	Sri Lanka
Payments to providers, general: per-pupil subsidies or grants	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
Payments to providers, specific: operating expenses, e.g. books	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes
Payment of teacher salaries or teacher provision	Yes	No	Yes	...	No	No	Yes	No
Payments to parents or students	No	No	Yes	No	No	No	Yes	No
Other, e.g. gifts or loans	No	No	...	...	Yes	No	Yes	No

Source: GEM Report team analysis based on PEER country profiles on non-state actors in education.

BOX 5.1:

Bangladesh's unique Monthly Pay Order system is in need of reform

In Bangladesh, the Monthly Pay Order (MPO) is the mechanism by which the government pays the basic salaries and a portion of the medical allowance and selected other benefits for a proportion of non-government school teaching and other staff. Some 28,000 non-state institutions are in the MPO system, including over 16,000 secondary schools (which account for 92% of total secondary enrolment), 7,600 *madrasas* (which cover almost all students enrolled in these institutions), 1,500 primary-level *ebtedayee madrasas* and numerous vocational institutes and colleges. While MPO grants are supposed to supplement the income schools generate from tuition fees, donations and other sources, most schools rely on the MPO system to fund their operations and have inadequate resources to ensure education quality.

International donor assessments of the MPO system have highlighted insufficient accountability and inequitable distribution of MPO teachers. There is no clear mechanism to provide MPO support based on needs, resulting in a shortage of subject-based positions. Additional teachers are financed through school fees and paid less than MPO-supported teachers. There is inadequate compliance monitoring and enforcement on MPO guidelines, including performance monitoring of MPO-supported teachers.

Areas that need improvement include putting emphasis on teacher performance and time spent on teaching management, deploying an adequate number of qualified subject-based teachers through transparent procedures, formulating and institutionalizing teacher career paths and steps to improve non-government teacher selection, and providing additional incentives to serve in remote areas (ADB, 2018). An ongoing programme supported by the World Bank aims to rationalize and make the MPO mechanism more strategic to fill teacher gaps, but progress has stalled due to the COVID-19 pandemic (Bangladesh Ministry of Education, 2018; World Bank, 2020). A revised policy was published in 2021 with the objective of simplifying existing payment streams. The revision includes updates to staffing structures and to MPO grant application and award procedures.

Source: BRAC (2022).

BOX 5.2:

Delhi and Kerala have made political commitments to support public education

While India has witnessed one of the fastest expansion rates of non-government education provision in the world, one state and the capital territory have moved in the opposite direction. Kerala scored the highest among 18 large Indian states in a new good governance index, doing particularly well in infrastructure development, education, health and employment (Gollerkeri, 2021). In 2019/20, it allocated 16.6% of its total expenditure to education, higher than the national average (15.8%). A UNICEF survey in Assam, Bihar, Gujarat, Kerala, Madhya Pradesh and Uttar Pradesh showed that Kerala had been the most proactive in supporting students. It was the only state where nearly everyone who used remote learning reported that the government had provided remote learning resources and more than 90% of respondents reported that students were speaking with their teachers (UNICEF, 2021).

Through a programme to promote public education, Pothu Vidyabhyasa Samrakshana Yajnam (General Education Protection Mission), Kerala started reinvesting in public education in 2016. The state government aimed to upgrade 1,000 schools to centres of excellence, improve basic infrastructure in all schools with more than 500 students, and enhance technology-enabled learning. Improving school infrastructure is driven by investments by the Kerala Infrastructure Investment Fund Board and substantial education sector infrastructure spending. One year into the interventions, public school enrolment had increased by over 150,000 students (Varma, 2018), and 934,000 more students were enrolled in public schools in 2021/22 than in 2017/18.

In the territory of Delhi, media reports and independent assessments have highlighted transformations of secondary schools in recent years (Biswas, 2020; Boston Consulting Group, 2021). Government funding for schooling and higher education institutions nearly tripled between 2015/16 and 2020/21: At 25% of the budget, it is the highest share among Indian states and union territories. Funds were used for infrastructure, teacher training and learning programmes. While there are critical reports on public school experiences, government efforts have been lauded (Sahoo, 2020; Sahoo and Mahajan, 2020). Nearly all public school students pass the grade 12 examinations, exceeding private school pass rates. After the COVID-19 pandemic began, over 200,000 students sought to switch from private to public secondary schools. While this shift is linked to parents' economic distress, improved perceptions of public schooling are also credited as a reason (Chhetri, 2021).

Building trust in government and improving the quality of government schools can help develop more balanced collaboration with non-state actors. In Delhi, the government's engagement with private and non-profit actors takes various forms. Its Business Blasters programme started in 2021 with the objective of developing 'job providers rather than job seekers' among public school students. Currently, some 1,000 student-led start-ups have been selected for the programme's next round (Press Trust of India, 2022). Media reported that the government would expand the programme to private schools in 2022. At the same time, the government has issued orders to private schools not to force parents to buy expensive books and uniforms to curb commercialization and household burden.

In Pakistan, the teacher salary scale and employment conditions in private institutions were brought onto a par with those in government schools in 1972. This led to a temporary stop in the grant-in-aid school systems. In 1979, the policy shifted again to allow the private sector to open its own schools, indicating the government's intentions to motivate and encourage the expansion of private education through grants in aid and to decentralize public education (Afridi, 2018). The grant-in-aid system was replaced with a public–private partnership system over time, which was institutionalized in 2010. Punjab province has experimented with such partnerships for decades; its Punjab Education Foundation has four major programmes (**Table 5.2**), which absorbed 92% of the foundation's US$186 million of expenditure in 2016/17.

A programme of charter schools run by education management organizations in Pakistan's Sindh province uses a two-phase competitive bidding process. First, bidders' technical capacity is assessed on the basis of their management experience, proposed work plan, professional profiles and strategies to achieve performance and efficiency targets. Qualifying organizations are then assessed based on financial proposals (LaRocque and Sipahimalani-Rao, 2019).

Through the 2009 Right to Education Act, the Indian government tried to bring all private unaided schools under government control by requiring them to give 25% of their seats to children from poor backgrounds in return for reimbursements. But in many states, the government delayed payments or substantially

TABLE 5.2
Main features of programmes financed by the Punjab Education Foundation

Programme 2016/17 expenditure	Year launched	Description	Schools	Cost per child (US$)
Foundation Assisted Schools US$106 million	2005	Per-student subsidies provided directly to private schools that meet criteria	3,700	$3.30–$9
Education Voucher Scheme US$27 million	2006	Tuition vouchers for children in poor areas to attend eligible private schools	1,650	$3.30–$6.60
New Schools Programme US$11 million	2008	Establish new schools where there is no public school within 1 kilometre	2,404	$3.30–$9
Punjab School Support Programme US$28 million	2016	Outsourcing public schools to private operators	4,276	$4.20 (organizations) $3.30 (individuals)

Source: Crawfurd and Hares (2021).

reduced reimbursements from the mandated levels (Aslam and Kingdon, 2021). Moreover, the multiple steps of the reimbursement process can lead to several types of delays (Sarin et al., 2018).

LIMITED FUNDING IS PROVIDED TO NON-STATE ACTORS AT OTHER LEVELS

Early childhood education has been persistently underfunded: It accounts for only 3.9% of government education expenditure in South Asia. Governments use subsidies, grants, taxes and various incentives, from start-up funding to public land, to encourage non-state providers to operate in the sector. A review of regulations for this report found that 131 of 194 countries offered such incentives; in South Asia, such incentives are offered in India, the Islamic Republic of Iran, Maldives, Nepal and Pakistan.

In the Islamic Republic of Iran, the government supports non-state services by leasing or selling excess land and buildings to non-state schools and allocating annual subsidies to non-state providers for the purchase of land and buildings, construction, equipment and the maintenance of non-state schools. Non-state owners are also supported with bank credit under the Law on Interest Free Banking. Nepal's government, on recommendations by district education officers, provides grants to early childhood education centres to cover establishment and facilitator costs. Additional subsidies for facilitator salaries are provided to vulnerable communities. Dalit students, students with disabilities, out-of-school children and poor children also have special rights to acquire free education and be provided with scholarships at state and non-state early childhood centres and schools. In Pakistan, provincial foundations provide non-state actors from pre-primary to secondary education with grants, loans, infrastructure, community facilities and other services related to establishment and maintenance.

In **tertiary** education, governments provide funds to non-state institutions directly or indirectly, through tax breaks, land grants, student loans and scholarships. In Bangladesh, higher education institutions benefit from value-added tax exemption. Bhutan's government provides tax breaks to non-state tertiary institutions, which can be extended for institutions that devote a significant budget share to research activities. In Sri Lanka, the government wants to establish a 'free education investment zone' to attract foreign investors and branch campuses from foreign universities, and has promised to provide infrastructure, land and tax breaks (De Alwis, 2020).

Governments also provide funding to non-state tertiary institutions to enhance education quality. In Bangladesh, the government's Higher Education Quality Enhancement Project provided funds to both state and non-state institutions to purchase

> "Early childhood education has been persistently underfunded: It accounts for only 3.9% of government education expenditure in South Asia"

> Public spending on adult learning and education accounts for a tiny percentage of government education budgets worldwide

research equipment, establish or improve laboratories, modernize classrooms, update curriculum and upgrade teaching and learning facilities. The government also grants funds to promote partnerships between universities and industry (World Bank, 2019).

In India, the Ministry of Human Resource Development announced 20 Institutions of Eminence, 10 public and 10 private institutions, to be offered complete autonomy and financial assistance up to US$134 million over five years to help them become 'world class institutions' (India Ministry of Human Resource Development, 2018; Niazi, 2019). The government also provides support to students. Analysis of 2017/18 data shows that at the tertiary level, 20% of students received some type of scholarship in the academic year, of which over 95% were awarded by the government. The average government scholarship for those attending private unaided institutions (INR 13,600) was nearly twice the amount for those attending government institutions (INR 7,000). Governments also encourage financial institution contributions. The Ministry of Finance called on commercial banks to be more involved in providing student loans. In response, the Indian Banks' Association developed a model education loan programme, to be applied by all banks, with rules on student eligibility, maximum loan amounts, collateral conditions and the alignment of interest rates with the prime lending rates, usually reserved for customers with good credit.

In **technical and vocational education and training** (TVET), Bangladesh has estimated that families pay US$500 annually, on average, for studies in public vocational institutions, and even more in private centres. The government provides stipends for selected courses but they do not apply to private education, which accounts for most of the country's vocational provision (BRAC, 2022; Nakata et al., 2018). Pakistan's Technical Education and Vocational Training Authority increased the number of interest-free loans for TVET students. Until 2017, interest-free loans in collaboration with the Akhuwat Foundation allowed 7,000 students to access vocational education (Pakistan Express Tribune, 2017).

In India, an evaluation of the Merit-cum-Means scholarship programme for technical and vocational education in 2013 stressed that it was important to improve the frequency of disbursements, since poor households' capacity to pay for technical and professional education was negligible. Beneficiaries also highlighted the need to raise awareness of the programme (India Ministry of Minority Affairs, 2021).

Public spending on **adult learning and education** accounts for a tiny percentage of government education budgets worldwide. Between 2015 and 2019, India, Pakistan and Sri Lanka allocated less than 2% of their education spending to the sector. By contrast, Bhutan and Nepal reported spending 4% (Govinda, 2017). Adult education is still not explicitly designated in budget lines; rather, it is delegated to extrabudgetary costs or to other actors (UIL, 2019). In Bangladesh, the national budget does not show regular and specific allocations to non-formal adult education. State projects in the sector are mainly financed by the government's development budget, which relies on donor contributions (BRAC, 2022). Consequently, the sector needs to raise funds; engaging non-state actors is considered central to these efforts (Govinda, 2017).

MANY DONORS AND FOUNDATIONS SUPPORT NON-STATE ACTIVITY

While external and philanthropic education finance is dwarfed by government financing in South Asia, it remains substantial in a few countries and is generally influential, shaping programmatic and policy directions.

AID TO EDUCATION IS SMALL IN RELATIVE TERMS BUT INFLUENCES POLICY

Aid to education remains important in absolute terms in some South Asian countries. Until recently, in Afghanistan, international donors have been major contributors to education budgets (Hatsaandh, 2022). In Bhutan, UNICEF has contributed to the development of early childhood education through financial and technical support (Pisani et al., 2017). In Sri Lanka, donors have supported higher education and TVET (Institute of Policy Studies, 2022).

But regardless of volume, certain donors have pivotal influence on some policy issues. For instance,

the World Bank uses loans conditions, technical assistance, research studies and events to strengthen its position as a knowledge broker. With respect to private provision, World Bank education strategies have evolved from strongly endorsing private participation to acknowledging risks but still recommending public–private partnerships as a useful strategy (Edwards Jr et al., 2021). The question of how donors engage with governments on non-state education provision remains contentious. A review of 924 government officials' views across 36 countries showed that they were less content with the technical advice donors provided on private schools than with their advice on, say, teachers, textbooks, curricula or examinations. The responses were somewhat similar among the 62 officials from Bangladesh, Nepal and Pakistan, the three South Asian countries in the survey, with 29% saying they were not content with such advice (vs 37% globally) and only 25% saying they were content (the same as in the rest of the world) (Bedasso et al., 2021).

Unlike the general global trend, South Asian countries have received significant external funding support for private education provision. An analysis of World Bank project documents between 2008 and 2012 found that Bangladesh, India, Nepal and Pakistan were among only seven countries where direct support for private provision was included in the projects. In Bangladesh, the World Bank provided grants in aid for private schools, especially at the secondary level (Mundy and Menashy, 2014). In India, the World Bank has provided loans of up to US$500 million in the Strengthening Teaching-Learning and Results for States project to strengthen in-service teacher training, teacher knowledge and teacher management quality in six states through a multi-donor trust fund to catalyse funding from private sources. The initiative has been criticized for spending taxpayers' money on non-state actors, a lack of capacity building and stakeholder consultation, and an excessive focus on standardized testing (Borkowski et al., 2021). In Nepal, World Bank policy documents in the 1990s advocated for stimulating private provision to improve quality, an intervention that is credited with having influenced the seventh amendment to the Education Act in 2001, which allowed the opening of private schools (Regmi, 2017). In Pakistan, the World Bank financed the government-established foundations promoting private education. Between 1995 and 2017, in partnership with the UK Department for International Development, loans worth some US$1.9 billion went to projects that included support for private education (Afridi, 2018).

Public–private partnerships have also been used to finance social impact bonds, in which a private investor provides capital up front and repayment is contingent on results, such as completion rates or achievement of specific learning outcomes. India has offered many opportunities to experiment with impact bonds due to its regulatory environment and incentives for corporate engagement (**Box 5.3**).

However, external support to for-profit education providers has been criticized. The International Finance Corporation (IFC) has responded to such criticism – and to recommendations of the World Bank's Independent Evaluation Group – by freezing its investment in such providers in pre-primary, primary and secondary education and committing to study their impact on access, quality, poverty and inequality. However, the IFC announced its work with for-profit actors would continue in education technology, infrastructure, higher education and early childhood services (IFC, 2022).

Donor financing sustains and influences many non-governmental organizations (NGOs) in the region. In Nepal, 86 of 230 international NGOs registered with the Social Welfare Council focus on education, children and youth. There are fewer national institutions focusing on education and most are located in the capital. UNICEF and UNESCO have supported the creation and development of early childhood education since the late 1980s, engaging not only with the government but also with NGOs. In Pakistan, national and international NGO partners support efforts to establish pre-primary education, especially in rural areas (Khan, 2018).

Conflict and crises are often the backdrop of NGO involvement in education. But the near permanence of uncertainty and fragility means that, in some countries, NGOs remain parallel providers for too long. While their services in emergency contexts offer relief, concerns about sustainability remain, as their initiatives are relatively small in scale and they depend

“World Bank education strategies have evolved from strongly endorsing private participation to acknowledging risks but still recommending public–private partnerships as a useful strategy”

BOX 5.3:

India has become a laboratory for results-based financing in education

India has served as a testing ground for social impact bonds in education. The India Educate Girls Development Impact Bond in Rajasthan ran from 2015 to 2018 with a capital commitment of US$280,000 (Gustafsson-Wright et al., 2015; Gustafsson-Wright et al., 2017).

The Quality Education India (QEI) Development Impact Bond, running from 2018 to 2022, is the largest of its kind in education at a cost of US$11 million. It builds on lessons from the Educate Girls bond, which reached 7,000 children (Edwards, 2019). QEI aims to reach more than 300,000 poor children of primary school age and improve their learning outcomes (Ecorys, 2019b). It includes a broad coalition. The risk investor is the UBS Optimus Foundation, while the British Asian Trust, the Michael & Susan Dell Foundation, Comic Relief, the Mittal Foundation, the Larry Ellison Foundation and British Telecom are the outcome funders. The UK Foreign, Commonwealth and Development Office provides technical assistance. The novelty of the funding mechanism and possible reputational risks led to choosing providers with a track record: the Kaivalya Education Foundation, Gyan Shala, Society for All Round Development, Educational Initiatives and Pratham InfoTech Foundation.

An evaluation found significant costs associated with designing and launching the mechanism and fundraising (Ecorys, 2019a, 2019b). First-year results, which found mixed effects on learning, led to some underperforming programmes being dropped, but the results were considered to be on track (Edwards, 2019). Second-year results, released in August 2020, were positive: Learning gains were much higher, with children learning twice as fast as their peers in control schools and substantially outperforming targets (Quality Education India Development Impact Bond, 2020).

Social Finance India, an impact financing platform launched by the Tata Trusts and the Global Steering Group for Impact Investment, aims to provide US$2 billion by 2030, of which US$1 billion will be directed to non-state education service providers through the India Education Outcomes Fund, and US$1 billion will support the India Impact Fund of Funds to catalyse debt-for-impact in education, health and housing (Mehendale and Singh, 2020).

on humanitarian funding, which tends to be short-term and unpredictable (UNESCO, 2019). A review of nine NGO-implemented peace education projects to counter violent extremism in Pakistan found that a few had produced valuable education materials, but they were overdependent on aid funding and came to an end when funding dried up, as strong links with the government had not been established (Ahmed and Shahzad, 2021). Fragmentation also results, making it difficult to assess the effectiveness of non-state interventions.

Dependence on external funding ends up influencing NGOs' approaches in contexts where they are the main providers of education services (Zarestky and Ray, 2019). In India, as elsewhere, NGOs have become essential for delivering education services, but the reliance on international donors has affected teaching and learning processes and content, which have become more formalized and skills-oriented in an attempt to meet donor standards (Bhutani Vij, 2020).

In Afghanistan, external finance supported the country on a large scale but was not sustainable, and the strong involvement of non-state actors reduced the incentive for the state to fulfil its responsibilities. Street Child, an NGO, supported 100 community education centres which delivered an accelerated course that compressed six years of school into three. Students were then referred to local education authorities to transition to state schools: 90% of students in Kabul's informal settlements transferred to state schools and 85% were retained after one year. Yet the state lacked the capacity to absorb these centres (Street Child, 2021). The short-term nature of several teacher training programmes is not believed to have delivered substantial improvement in classroom instruction due to a lack of robust policy framework, among other issues (Noorajan, 2020).

Afghan officials interviewed for this report argued that direct education services provided by international NGOs were financially unsustainable. The Ministry of Education's community-based education policy had urged the ministry and implementing partners to agree a per-student base cost that the ministry could sustain once NGO interventions ended (Hatsaandh, 2022). Access to donor funds has been another issue. Processes gradually became more demanding to enhance transparency and accountability, which favoured bigger, predominantly Kabul-based NGOs and challenged smaller NGOs (Hanemann, 2021).

Competition for donor funds and the need to show certain kinds of outcomes sometimes distorts research

> Dependence on external funding ends up influencing NGOs' approaches in contexts where they are the main providers of education services

and evidence generation. In Pakistan, due to the low level of public funding devoted to research, most projects are funded by donors, which poses problems. Donors tend to fund for-profit research companies instead of universities, which they believe lack capacity. In 2018, nearly two thirds of aid to education research was channelled to private-sector institutions (OECD, 2020). This perpetuates a vicious cycle in which lack of funds undermines capacity. Most donor-funded research is not publicly disseminated, which means it is less likely to be scrutinized or peer-reviewed. Those carrying out the research are accountable to donors rather than national stakeholders. Finally, donors concentrate research in Punjab for security, infrastructure and bureaucratic reasons, at the cost of equity (Zubairi et al., 2021).

PHILANTHROPIC AND CORPORATE ACTIVITY IS LIMITED BUT GROWING

Corporate and philanthropic actors involved in education are diverse, with motivations ranging from charity to corporate interest (UNESCO, 2021). Corporate activity with philanthropic intent has grown in parallel with philanthropic foundations focusing more on non-profit work (Srivastava, 2020). Cross-border private philanthropy represents the eighth-largest source of funding, well behind bilateral and multilateral donors. OECD data show that India received the bulk of philanthropy from private foundations between 2009 and 2019 in the region (OECD, 2019). The Michael & Susan Dell Foundation, for instance, supports LabourNet, the largest vocational training company operating in informal sector jobs, as part of the Jobs and Livelihoods initiative within its Family Economic Stability programme (Michael & Susan Dell Foundation, 2020).

But domestic philanthropic funding in India far surpasses international philanthropy, reaching US$1.8 billion between 2013 and 2017, with education one of the top sectors. After passage of the corporate social responsibility (CSR) clause in the 2013 Companies Act, 13,000 to 15,000 companies fell under the CSR mandate. There has been a surge in education spending, increasing from some US$313 million in 2014/15 to US$850 million in 2019/20 and accounting for over a quarter of total CSR funding. In 2019, the government expanded CSR rules to allow the 2% mandatory contribution from companies to fund public tertiary institutions and government-funded research organizations and laboratories (Jebaraj, 2019). The nature of philanthropic activity has changed, with increasing involvement in provision of supplementary services (e.g. information and communication technology, textbooks, assessment materials and teacher training) and policy agenda setting through research funding (Centre for Policy Research, 2022). An analysis of 300 companies' CSR contributions to the education sector between 2016 and 2020 found that Gujarat, Karnataka and Maharashtra were the top three recipient states. After 2017/18, there was a sharp decline in projects implemented in collaboration with the government (CSRBOX, 2022).

In Sri Lanka, the private Hemas Outreach Foundation has become a member of the national coordination committee for the development and implementation of the early childhood care and education policy due to its successful, decades-long CSR initiative on this issue, which began in 2002 with its Piyawara project on teacher training, infrastructure development and emergency intervention during national disasters. The project has added 56 model preschools to the government network and reaches nearly 3,000 children daily in partnership with the government (Hemas Outreach Foundation, 2022; USAID et al., 2020).

Among NGOs working on teacher training, those largely supported by prominent corporations are gaining considerable influence in policymaking circles (Srivastava, 2016). Social network analyses have demonstrated notable links between Teach for India and funders,

> Domestic philanthropic funding far surpasses international philanthropy, reaching US$1.8 billion between 2013 and 2017, with education one of the top sectors

foundations, NGOs, influential academic institutions and government bodies (Vellanki, 2014). In Delhi, there are many links between private entities and government institutions. Teach for India Delhi is collaborating with some district institutes of education and training. Creatnet Education is partnering with the Delhi State Council of Educational Research and Training to run a government school principals leadership programme (Sivasubramaniam, 2020).

The potential for profit has attracted venture capital to non-state education technology companies. Analysis of 105 investors in Indian education technology start-ups in 2019 found that venture capital firms and angel investors accounted for almost 80% of education investment (Inc42 Plus, 2020; Agarwal, 2020). The top 10 venture capital firms tend to fund start-ups that are already doing well instead of newer start-ups. Out of the more than 4,000 start-ups in 2019, only some 190 were able to raise funding for themselves (Agarwal, 2019). Of those funded start-ups, 78% provided test-preparation services, followed by the 8% that provided course certifications (Inc42 Plus, 2020). A recent crackdown by the Chinese government on private tutoring and education technology start-ups has provided opportunities for Indian start-ups as venture capitalists look for new investments (Nair, 2021).

In Nepal, the philanthropic landscape includes individuals, foundations, the private sector, diaspora networks and NGOs (Nepal Center for Philanthropy and Development, 2020). The 2020 Industrial Enterprises Act made CSR mandatory in certain industrial sectors and financial institutions. Industrial enterprises with annual turnover over US$1.1 million are expected to set aside at least 1% of annual net profit for CSR purposes. Philanthropically oriented school networks include Samata Shiksha Niketan, founded in the early 2000s, which runs a network of 80 low-cost private schools (Institute of Integrated Development Studies, 2022).

In Pakistan, recent efforts have focused on aligning CSR contributions with the government's Ehsaas safety net programme. Improved communication, facilitation and interaction with top company management is recommended to provide CSR guidelines and attract greater investment in certain areas, including education, to achieve social impact (Pakistan Centre for Philanthropy, 2019).

In other countries, information on CSR in education is anecdotal. In Bangladesh, guidelines suggest that education and skills development are eligible areas for CSR support. A study of the CSR practices of four state-owned and four private banks in Bangladesh found some emphasis on education and engagement through scholarships and computer labs (Roy et al., 2017). Earlier analysis of five commercial banks found that CSR was a very small share of before-tax profit, ranging from 0.4% to 2% (Rana and Roy, 2016). In Sri Lanka, an analysis of annual reports on CSR practices found that 53% of 292 companies had adopted CSR reporting, giving priority to job training, employee welfare, charities and community projects; 91% of companies engaged in community projects, such as scholarships for rural students, English language skills training and infrastructure (Fernando, 2018).

While philanthropic efforts have been increasing in importance in the region, CSR funding is still a weak substitute for the lost corporate and wealth taxes that are necessary to strengthen education systems (Kundu, 2018). In India, CSR funding adds up to some US$350 million a year, which is about 3% of the education ministry's budget of some US$11.5 billion. Yet even with historically low corporate income tax rates, India is estimated to have lost US$16.8 billion a year, or 0.7% of GDP, to tax evasion and international corporate tax abuse (Global Alliance for Tax Justice et al., 2021).

HOUSEHOLDS END UP BEARING TOO LARGE A SHARE OF EDUCATION COSTS

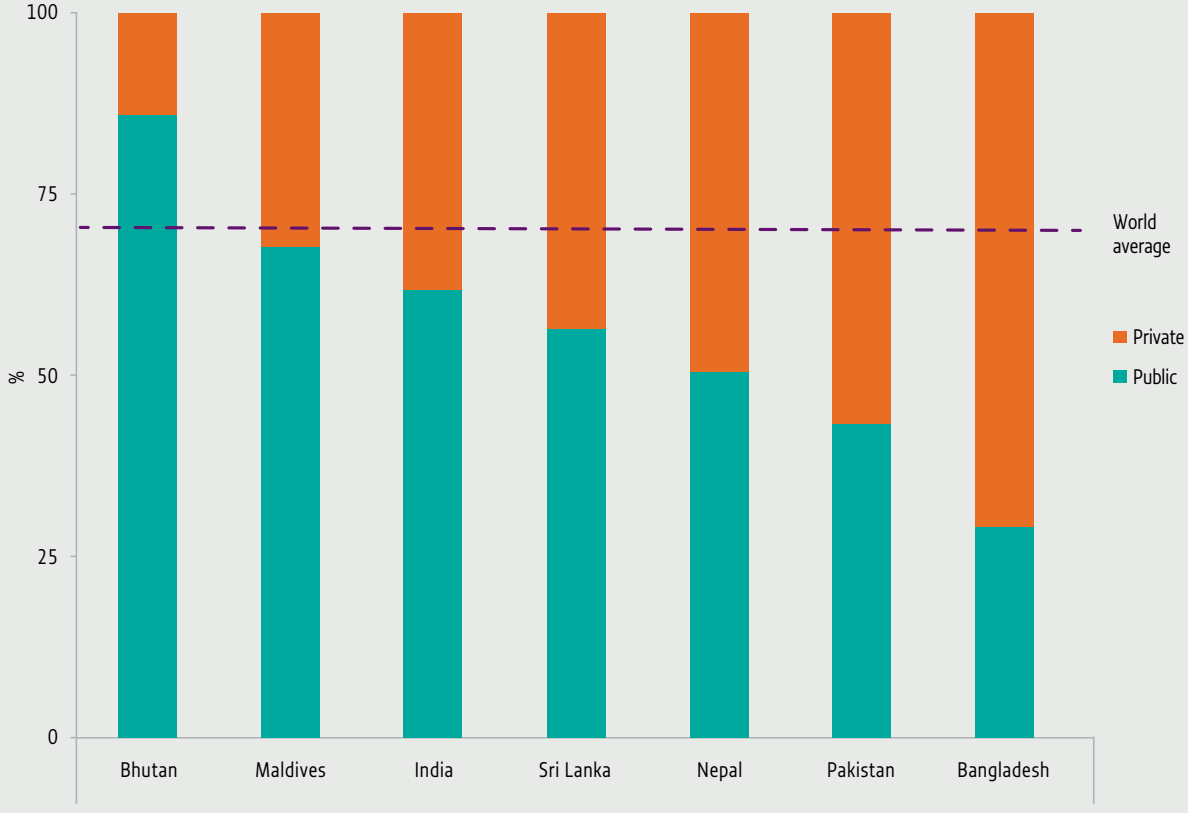
As governments struggle to raise domestic revenue to fund social services, much of the burden for education falls directly on households. Central and Southern Asia is the world region with the highest share of total education cost borne by households (38%) – slightly higher than in sub-Saharan Africa and in Latin America and the Caribbean but more than triple the Europe and Northern America share (12%). Households in six of the seven South Asian countries with data spend more than the global average (30%). In Nepal and Pakistan, households spend at least as much as governments, and in Bangladesh they account for 71% of total education costs, one of the highest rates in the world (**Figure 5.1**). Overall, education spending by households in Central and Southern Asia accounts for 2.3% of GDP, compared with 3.9% of GDP spent by governments, the lowest level in the world. These average figures hide key information: Given that much of private spending in high-income countries is directed to higher education, the gap in household spending in primary and secondary education is much higher between South Asian countries and high-income countries.

> CSR funding is still a weak substitute for lost corporate and wealth taxes that are necessary to strengthen education systems

Household spending covers a wide range of costs: formal and informal fees, uniforms, textbooks, stationery, transport, private supplementary tuition and boarding. While comparative analysis is difficult due to differences in how surveys categorize items, some general patterns hold – for example, richer households spend more on education. In Bangladesh, in 2016, the median household in the richest quintile spent BDT 1,933 per month on education, or six times as much as the median household in the poorest quintile, which spent BDT 315 (Genoni at al., 2019). In India, households in the richest quintile whose children attend private unaided schools spend four times as much as their peers whose children attend government schools. They also spend four times the amount spent by families from the poorest quintile whose children attend private unaided schools (**Figure 5.2**).

In Nepal, fees at institutional (non-state) schools are not affordable for poorer households. Analysis of monthly primary school fees for three major cities shows that the fees charged by the most expensive 5% of schools were double those charged by the cheapest 10% of schools in Chitwan and Pokhara, and five times higher in Kathmandu (**Figure 5.3**). Households spent an extra 29% of the per-student average cost on items other than tuition in early childhood centres, 34% in community secondary schools and 42% in institutional secondary schools (Institute of Integrated Development Studies, 2022).

FIGURE 5.1:
In six out of seven South Asian countries, households spend more for education than the world average
Share of education expenditure, by source and income group, 2010s



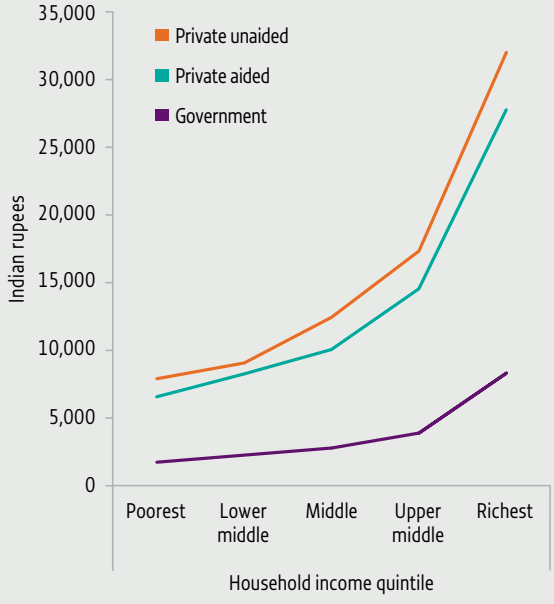
Source: GEM Report team analysis based on national household budget survey reports and UIS data.

Public institutions are typically less costly but are not entirely free, especially at higher levels of education. While household expenditure in non-state schools tends to be mostly allocated to fees, other items dominate the public spending budget for households sending their children to state schools: for example, uniforms, textbooks, transport and private supplementary tuition. Household primary and secondary education expenditure as a share of GDP can be quite high. In Pakistan, total household spending across all levels of education was about 2.4% of GDP in 2019, which was slightly higher than government spending. There were clear gender gaps favouring boys in both urban and rural areas (**Figure 5.4**). According to the Social and Living Standards Measurement Survey 2013–14, the average annual cost per child was about US$67 in *deeni madaris*, US$74 in government schools and US$158 in private schools (Malik and Hussain, 2022).

Private tutoring is a major reason why households spend a lot even when their children attend public schools. In Sri Lanka, households in the richest quintile spent three times as much as those in the poorest quintile on private tutoring in 2016/17, but less than them as a share of their total education spending (**Figure 5.5**). Higher tutoring expenses mean rich households can pay higher fees for higher quality. Anecdotal evidence suggests that richer students are more likely to attend individual or small-group tutoring classes while poorer students largely attend mass classes, sometimes through digital recording technology (Institute of Policy Studies, 2022).

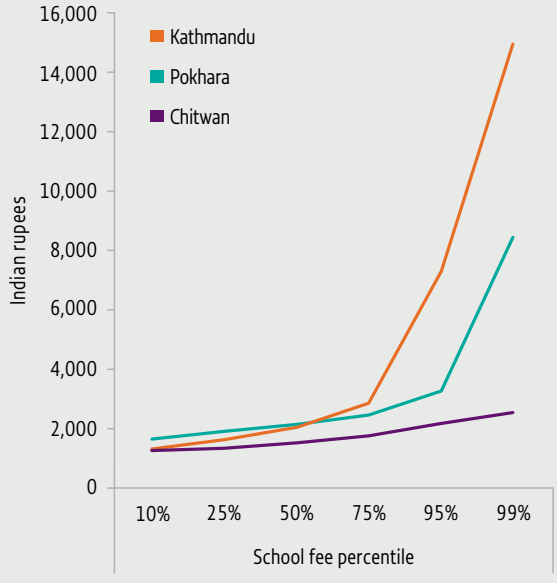
Non-state early childhood care and education provision remains unaffordable for most families. In Bangladesh, the 2016/17 Household Income and Expenditure Survey suggested that the wealthiest households spent some seven times what the poorest ones did per year on early childhood education (Bhatta et al., 2020). In Nepal, households contributed 63% of pre-primary

FIGURE 5.2:
In India, the richest households whose children attend private unaided schools spend four times as much as their peers whose children attend government schools
Per-child expenditure, by school type and household consumption quintile, India, 2017/18



Notes: Per-child expenditure refers to average expenditure incurred for children attending schools from the pre-primary to higher secondary levels. Private unaided schools include low-cost private schools.
Source: National Sample Survey, 75th round, Household Social Consumption: Education.

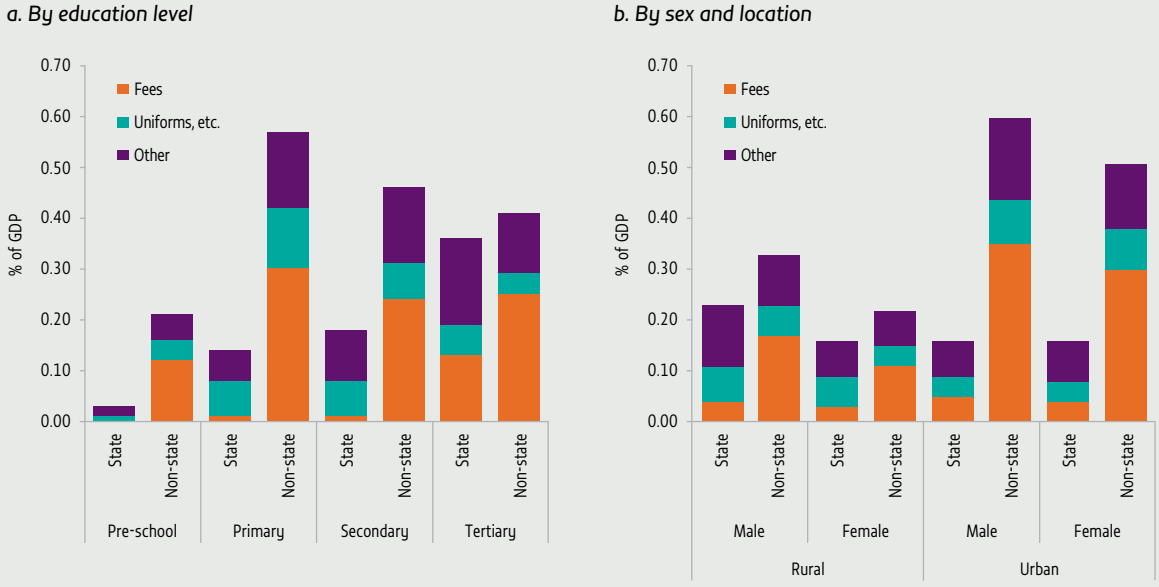
FIGURE 5.3:
Richer households pay higher primary education fees than poorer households
Monthly school fees for primary institutional schools, by location and school fee percentile, Nepal, 2014/15



Source: Institute of Integrated Development Studies (2022).

> In Pakistan, total household spending across all levels of education was about 2.4% of GDP in 2019

FIGURE 5.4:
There are large gaps in household education spending between public and private institutions
Household education expenditure as a share of GDP, by school type and item, Pakistan, 2019



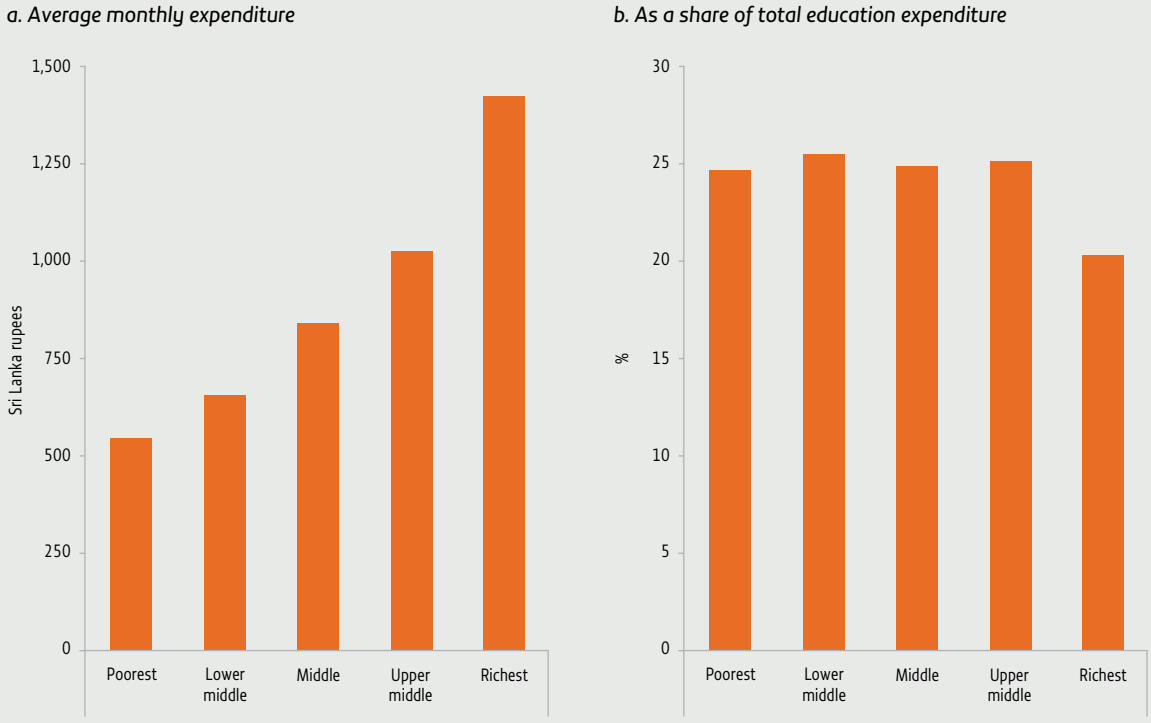
Source: GEM Report team analysis based on Institute for Health Metrics and Evaluation (2021).

education spending and 36% for primary education (UNICEF, 2019). Not all non-state providers cost the same. In Bangladesh, fees for government pre-primary schools were three times higher than NGO school fees, but private kindergarten fees were nine times higher than those for government schools. In Bhutan, the cost of private and other non-government centres, except non-profit centres, is considerably higher than the cost of public centres. Even households using public services must pay. Parents of students attending public, community-based centres reported paying between US$2 and US$28 per month (Rao et al., 2020).

Private tertiary institutions are similarly more expensive than public institutions. In India, the richest quartile of households spends, on average, nearly four times as much as the poorest quartile on private unaided institutions, which they are also nearly twice as likely to attend. Among households in the poorest quartile, those attending public institutions spend about 10% of their total budget on education, compared with 16% for those attending private aided institutions and 18% for those attending private unaided institutions. Most of the cost incurred by those attending public institutions relates to books, stationery, transport and private coaching (**Figure 5.6**).

> Non-state early childhood care and education provision remains unaffordable for most families

FIGURE 5.5:
In Sri Lanka, the richest households spend three times as much as the poorest households on private tuition but less than them as a share of their education spending
Supplementary tutoring expenditure, by income quintile, Sri Lanka, 2016/17



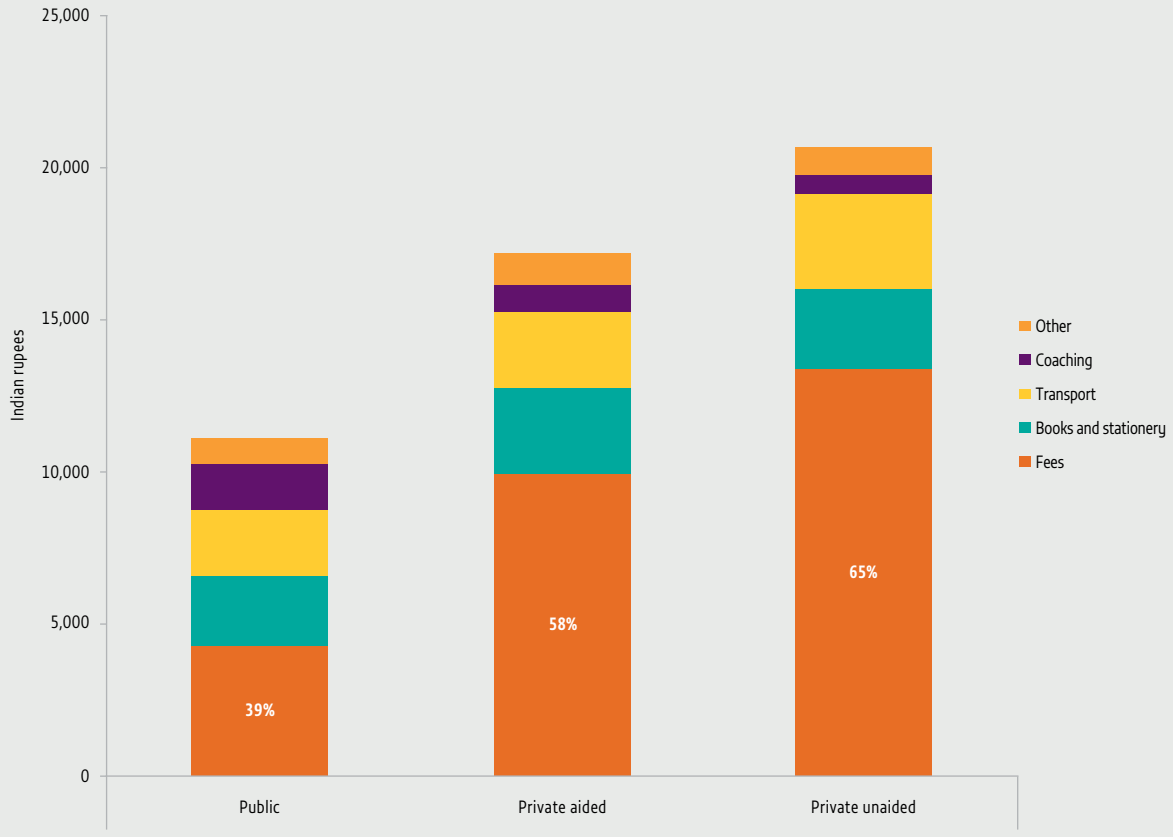
Source: Institute of Policy Studies (2022) based on 2016/17 Household Income and Expenditure Survey data.

In Sri Lanka, annual tuition charged by non-state providers is US$10,000 to US$15,000, which is well out of reach for households with an average monthly income of about US$300. In contrast, all public universities, except for the Open University of Sri Lanka, offer tuition-free undergraduate programmes, while over three quarters of their students receive government scholarships to help with living expenses. As a result, the socioeconomic composition of public universities is considerably more diverse than that of non-state institutions (Institute of Policy Studies, 2022). In Nepal, the estimated cost of a three-year course in nursing is US$4,000, in general medicine is US$3,400 and in pharmacy is US$2,800 (Dahal, 2020). TVET is costlier than other education levels and these costs often fall onto households. A comparison of costs per student in technical education institutions showed that in private schools, 75% of costs were covered by households, compared with only 8% in public institutions (Institute of Integrated Development Studies, 2022).

PUBLIC INSTITUTIONS OFTEN RELY ON HOUSEHOLDS

As implied in this section, in many cases households are called upon to share the cost of public education provision. In Nepal, community (public) schools are not fully funded by government and are supported through fees, NGOs and others. An analysis in Jhapa district found that only 70% of total costs were met by government financing (Wagle et al., 2017). Principals in 62% of 203 community schools across 16 districts reported that they had received financial support from an NGO or an international agency during the previous year (Schaffner et al., 2018). Experts interviewed for this report described NGOs often helping community schools purchase blackboards, chalk, desks, benches, textbooks and notebooks. However, NGO involvement is largely project-based and there are issues of continuity and predictability (Institute of Integrated Development Studies, 2022). In the Islamic Republic of Iran, the Heyat Omana schools were established by the Ministry of Education to engage and involve parents in school management

FIGURE 5.6:
Attending public tertiary institutions entails non-fee costs
Expenditure per item by students attending a tertiary course, by type of institution, India, 2017/18



Note: The analysis considers individuals who were attending an educational institution to pursue a diploma/certificate course, graduate or postgraduate level and above.
Source: National Sample Survey, 75th round, Household Social Consumption: Education.

and financial support. These schools belong to the state but are managed by a board of directors. There were 2,117 establishments educating 665,000 students in these schools in 2020 (Paivandi, 2022).

Public tertiary institutions have also increasingly engaged in cost sharing. Some have introduced or increased tuition fees. These can apply to all students, as is the case at the Open University of Sri Lanka (Institute of Policy Studies, 2022) and both state universities in Maldives, or through a dual-track system where only some students pay tuition. In 2011, government-funded colleges of the Royal University of Bhutan implemented a self-funding track, where students pay part of the cost. About 16% of students are enrolled in this option, and the goal of the university is to increase the share to 25% by 2030 (Schofield and Roder, 2022). In Sri Lanka, over 50% of higher education students are enrolled in paid courses offered by public universities, known as external degree programmes, specifically designed for students who did not score well enough to qualify for regular admission (Institute

> Public tertiary institutions have increasingly engaged in cost sharing

> In South Asia, 13% of families save and 8% borrow to pay for school fees

of Policy Studies, 2022). The dual-track system may also be applied to international students. In India, public universities such as Jawaharlal Nehru University have been considerably increasing international student fees, leading to student protests (Ibrar and Chettri, 2019).

Another cost-sharing method is to run fee-paying courses alongside free ones, usually for more advanced courses. In Sri Lanka, nearly all public institutions charge no tuition for undergraduate programmes but are allowed to charge tuition for external-degree and postgraduate programmes (Institute of Policy Studies, 2022). In Maldives, higher education is free, but public universities can charge for other courses (Shougee and Shareef, 2022). Cost sharing can also be implemented by charging other types of student fees. In Nepal, inadequate government funding and centralized fee-setting regulations have led some of the autonomous constituent campuses to increase other types of non-regular fees (Institute of Integrated Development Studies, 2022).

Community management is sometimes an approach used in adult learning and education. In Bangladesh, BRAC is in charge of running community learning centres (CLCs) or people's centres. It has launched the Shishu Niketan initiative to make its education programme more sustainable. The strategy aims to strengthen community ownership and, in the case of CLCs, to make communities responsible for resource diversification. As a result, almost 90% of CLCs are now managed by communities (Hanemann, 2021). Identifying local resources, targeting education provision to local needs and involving the population in the management of the centres have allowed CLCs to continue operating, combining public and private resources (NILE and UIL, 2016). The Afghan National Association for Adult Education opted for resource and capacity diversification in the face of shrinking donor funding. This strategy entails delegating centres' management to local NGOs. In 2019, centres covered 30% of their running costs. Expenses linked to coordination, capacity building, teacher training, teaching materials and equipment were not included. The strategy aimed to introduce contributions from learners in order to ensure the centres' self-reliance (Hanemann, 2021).

MANY HOUSEHOLDS BORROW FOR EDUCATION

To meet education costs, households around the world are borrowing. Poor parents employ a variety of strategies to cope. Some negotiate discounts based on the number of children they enrol. Others use their money up front to secure a place in the school, leaving nothing to pay for uniforms, textbooks and other materials. Some accrue a debt to the school and agree to pay it off in small instalments or even try to leave with their debt unpaid. Proprietors in India develop plans for unpredictable payments (Härmä, 2020). In South Asia, according to the 2014 Global Findex Database, 13% of families save and 8% borrow to pay school fees. The highest rates are observed in India, with 14% saving and 9% borrowing (Demirguc-Kunt et al., 2014) (**Figure 5.7**).

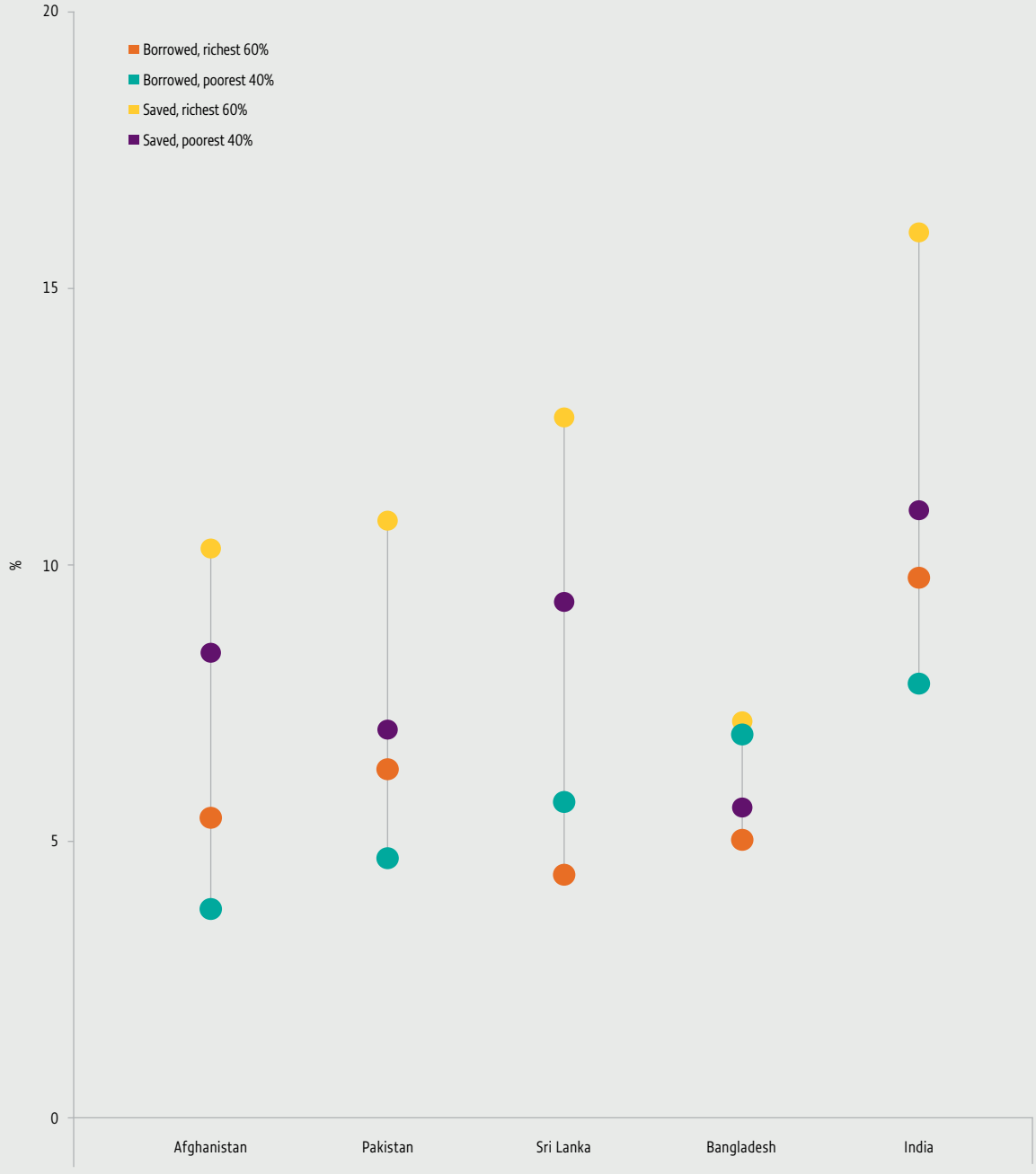
Shifting tertiary education costs to households requires strong student financial support systems. Governments in the region have increasingly resorted to student loans. In Bangladesh, it is estimated that around a third of families have borrowed money to help their children study at polytechnics. This issue is a particular concern for students from rural areas, who face higher transport and accommodation costs. Private polytechnics require 40% more out-of-pocket contributions to cover tuition fees, on average. Meanwhile, nearly half of public polytechnic students purchase private tutoring services (Nakata et al., 2018).

In India, relatively few students take out loans to finance tertiary studies. In 2017/18, only 4% of individuals attending private institutions, and less than 1% of those attending public institutions, reported using a loan to finance tertiary education. Over 90% of student loans are provided by public-sector entities, which offer lower interest rates than commercial banks (Sindwani, 2019). But the government has taken steps to increase the market's share by playing a coordinating role. First it requested, then approved, a student loan programme developed by the Indian Banks' Association that stipulates maximum loan amounts, collateral requirements and interest rate limits that must be adopted by all commercial banks issuing student loans. The government set up a portal that allows students to complete a single education loan application form that can be sent to multiple banks to facilitate the process and increase the reach

FIGURE 5.7:

About 13% of households save and 8% borrow to pay school fees in South Asia

Percentage of households that saved or borrowed to pay school fees, selected countries, 2014



Source : Demirguc-Kunt et al. (2014).

> Shifting tertiary education costs to households requires strong student financial support systems and governments in the region have been increasingly resorting to student loans

> Growing education expenditures challenge students, with some having to drop out and others taking to protesting fee increases

of education loans, particularly to students in remote areas (Baral, 2018). In 2018, the government mandated that all banks could offer education loans only through the government-maintained portal (Bavadharini, 2018). Nevertheless, between 2015 and 2019, the education loan market shrank from 334,000 to 250,000 students, with institutions blaming rising default rates. During the same period, however, the amount disbursed increased, indicating that banks were favouring high-value loans and rejecting requests below US$5,300, for which no collateral is required (Chitra, 2019).

Government student loan programmes have also been established in other countries, though their reach is limited. In Bhutan, the Ministry of Education started providing low-interest student loans for those attending non-state institutions in 2014 and by 2020 it had assisted 500 students (Schofield and Roder, 2022). The government of Sri Lanka subsidizes interest rates for public loans to students taking a four-year degree from a recognized non-state institution (Institute of Policy Studies, 2022). The National Bank of Pakistan offers interest-free student loans to academically strong students pursuing approved subjects at public institutions. In 2021, it disbursed loans to 518 students (National Bank of Pakistan, 2021). The Ihsan Trust, an NGO, offers interest-free loans to disadvantaged students attending state and non-state institutions (Ihsan Trust, 2022). Informal loans are also common. In Bangladesh, a graduate tracking survey found that 17% of college students borrowed from relatives or NGOs to help finance their tertiary degree, with families by far the main source. The share is even higher among male students from rural areas and reaches 30% among students in costlier polytechnic courses. There is no national student loan programme and borrowing from banking institutions is still uncommon (World Bank, 2019). Growing education expenditures challenge students, with some having to drop out and others taking to protesting fee increases (**Box 5.4**).

PRIVATE PROPRIETORS ALSO RELY HEAVILY ON HOUSEHOLDS

Private unaided institutions overwhelmingly rely on fees. In India, 1,002 of 1,052 low-fee private schools surveyed for this report relied exclusively on fees. The remainder relied to a lesser or greater degree on charitable contributions. School owners' ability to hire teachers varies according to their financial capacity. Fee levels were therefore correlated with the average experience of teachers: Only 11% of teachers had more than 10 years of experience in schools that charged less than INR 300 per month, compared with 35% of teachers in schools that charged more than INR 1,000 (Centre for Civil Society, 2022) (**Figure 5.8**).

In Nepal, in accordance with the guidelines for fee declaration and standards, schools can charge several types of fees. An analysis of 339 schools across 9 districts showed that almost all charged a monthly fee and an examination fee, while 92% charged admission fees. Many schools charged additional fees not related to tuition: 42% charged for computers, 54% for education materials and 61% for education excursions. About one in seven charged for building maintenance and even inter-school competitions. Teachers and non-teaching staff received less than the government salary range while founders and principals received more (Bhattarai et al., 2016).

In Pakistan, low-fee private school proprietors reported receiving only some 60% to 70% of fees per month. Parents who find it difficult to cope defer monthly payments. School owners can demand fee payment by calling on parents and asking them for payment or preventing children from sitting examinations. Some school coping strategies include leasing their building rather than buying it outright or taking out private loans (ITA, 2022). In the Islamic Republic of Iran, analysis of a wave of closures of non-government schools, conducted by the Ministry

> In India, 1,002 of 1,052 low-fee private schools surveyed for this report relied exclusively on fees

BOX 5.4:

High private and low public education expenditure has led to protests in South Asia

Protests are a means to note dissent and mobilize. Analysis of over 2,800 protests in 101 countries linked protests to government failures regarding political representation, democracy and corruption; economic injustice and austerity measures; civil rights and personal freedoms; and global justice for all (Ortiz et al., 2022). As an expression of dissatisfaction with the situation, teachers, students and parents have been involved in collective protest movements about education costs in South Asia.

Higher education institutions in Bangladesh introduced a range of cost-sharing practices in 2010. One of the largest public universities significantly increased tuition fees, while another introduced a fee-charging evening programme. Also, a tax was introduced on tuition fees at all private universities. A range of student organizations protested these decisions, which resulted in violence. Some of their immediate objectives were met. For example, the value-added tax on tuition fees was withdrawn, as was the decision to introduce fee-charging evening courses. Student union members noted that the majority of students only become aware of the impact of marketization when they face huge increases in school fees, since richer students are less likely to engage in political action (Kabir and Greenwood, 2017).

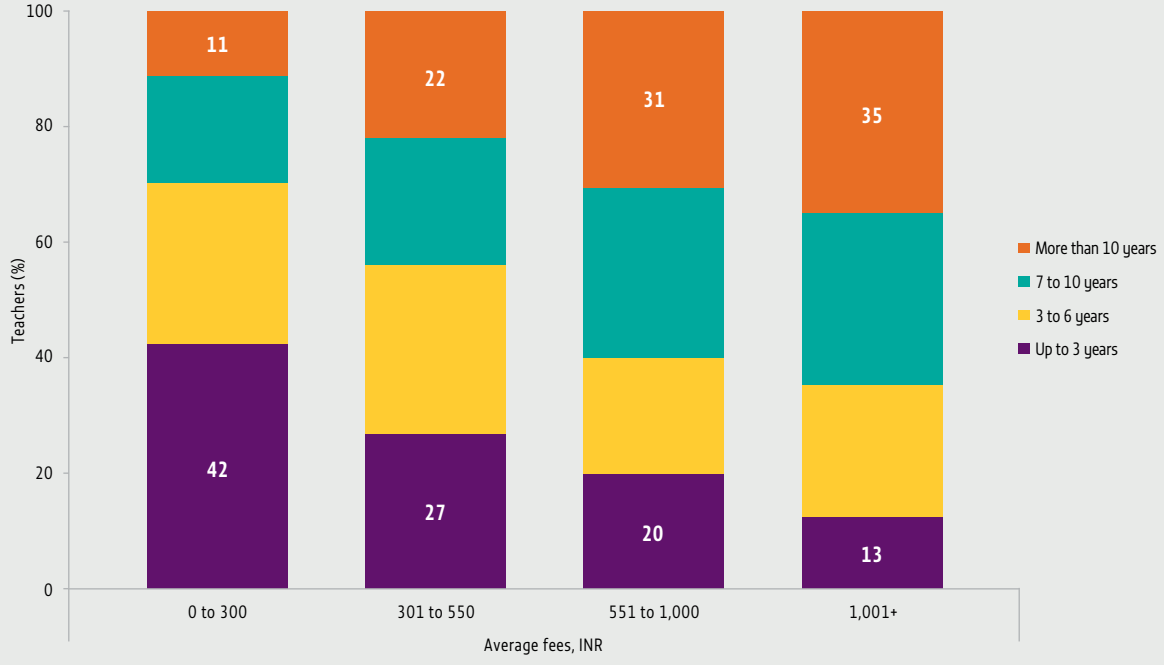
India has seen a resurgence of activism on college campuses in the past decade (Panigrahi, 2021). A study on fee increases by universities, focused on humanities, social sciences, science and engineering, found that 29 of 31 universities had raised fees. Several student protests broke out, challenging increases in fees for tuition, hostels and other charges. Students involved in the protests asserted that continuous fee increases would change the character of public universities, making them unaffordable for many. Furthermore, targeted fee waivers for disadvantaged groups, such as those from scheduled castes and scheduled tribes and students with disabilities, had not been adequate or honoured. Scholarship amounts were being reduced or had been accompanied by increased administrative burden (Panigrahi, 2019).

In Sri Lanka, the Federation of University Teachers' Associations led a 100-day struggle in 2012 to allocate 6% of GDP for education and protect education as a public good. The movement was popularized in media through references to a '6% T-shirt'. The large coalition included parents of primary, secondary and tertiary education students affected by government funding cuts (Witharana, 2015).

FIGURE 5.8:

In India, low-fee private schools that charge higher fees are more likely to have more experienced teachers

Low-fee private school teachers, by years of experience and average monthly school fee charged, selected Indian states, 2021



Source: Centre for Civil Society (2022).

of Education in 2012, found that parents had struggled because of the economic crisis (Arani et al., 2015).

Financial intermediaries aim to improve the marketplace for school loans for private schools. Private schools can raise funds in countries with developed financial systems, but in others lack of access to capital can be a severe challenge, especially for low-fee private schools. A number of financial service providers have sprung up as a result, often focusing on religion, charity or equity. Edify and Opportunity International are the largest education support providers, lending to single-proprietor low-fee private schools in 15 countries, providing funds for technology, working capital and infrastructure improvement and expansion. They and other institutions, including the Kashf Microfinance Bank in Pakistan, also help develop proprietors' capacity, focusing on school improvement planning and business administration training (Acholla, 2020; Sivasubramaniam, 2020).

Analysis of access to finance for Pakistan's low-cost private schools finds that most owners expect to rely on equity injections from personal savings and loans from friends and family. Few proprietors expect to borrow from commercial or microfinance banks, and a third of them noted the high cost of credit (ILM Ideas, 2014). An analysis of unconditional cash grants offered to 850 private schools across more than 250 villages in rural Pakistan found that when all schools in a village receive financing, the schools begin to focus on education quality to remain competitive in their village, rather than on infrastructure (Andrabi et al., 2020).

Analysis of low-cost private schools' access to financing in India found a similar major need for additional capital. But 73% of the schools proprietors interviewed had difficulty identifying a financial institution that gave loans to schools, even though just as many reported they needed loans for infrastructure (Opportunity EduFinance, 2020).

Representatives of teacher education institutions in Afghanistan, India and Nepal reported that lack of government funding was a major constraint on robust development of programmes (Ghimire, 2020). An analysis of funding sources for 19 providers found that almost three quarters received funding from independent foundations, over half received some financing from CSR funds and a third from international agencies, while only 17% received any financing from the government. In Afghanistan, funding primarily came from international agencies, while in India, it came from domestic and international foundations and CSR sources (TISS, 2022).

Education technology and tutoring companies focus on a revenue model for funding. Their fee-driven model charges students for subscription courses, upgrades and other special services. Companies might charge a tutoring commission, for example on a tutor marketplace, but must pay platforms a commission on their earned revenue (KPMG, 2021; Mukit 2020).

COVID-19 HAD A STRONG FINANCIAL IMPACT ON NON-STATE PROVIDERS

COVID-19 caused the gravest global disruption to education ever. South Asia was not spared, especially given the often poor access to radio, television and the internet in the region. In Bangladesh, the government made remote learning available through these means but less than 50% of children aged 5 to 15 had access to a radio, television or computer; 91% of children in the richest families but only 9% in the poorest had access to television (Rahman and Ahmed, 2021). In India, 75% of teachers reported that their biggest challenge was reaching students, while 51% mentioned maintaining class discipline online (UNESCO and UNICEF, 2021). In Nepal, learning relied mostly on textbooks for 77% of households (Radhakrishnan, et al., 2021).

In Pakistan, 60% of households had access to a television but only about half of students watched television lessons (Crawfurd et al., 2021). Overall, student engagement was extremely limited. In a World Bank survey of almost 6,000 families in Punjab province, less than 14% of girls and boys engaged in remote learning at the beginning of the pandemic, with the percentage falling further by 2021. Social norms impeded uptake of technological solutions for education, especially by girls. Mothers reported that the use of devices, including television, was considered inappropriate in certain households, preventing their access to any form of remote learning (World Bank, 2022).

“Private schools can raise funds in countries with developed financial systems but in others the lack of access to capital can be a severe challenge, especially for low-fee private schools”

Due to gaps in access to devices but also deficient instruction methods, lack of teacher preparedness and disparity in government support, education divides widened in this period (UNESCO, 2021). COVID-19 is believed to have disrupted learning differently in public and private institutions.

LEARNING WAS DISRUPTED, ESPECIALLY FOR THE DISADVANTAGED

Learning continuity varied by socioeconomic status and type of school attended. In India, a large-scale survey representative of children aged 5 to 16 living in rural areas was conducted in September 2020, after the sixth month of continuous school closures. Children attending government schools experienced greater learning decline than those in private schools, especially in grades 1 to 3. Among private school students, 29% reported using video recordings and 18% live online classes, compared with 18% and 8%, respectively, among their public school peers (ASER Centre, 2021). A 2020 study in five states revealed that more than 92% of the children surveyed lost at least one foundational ability in reading and 82% suffered the same in mathematics (Azim Premji Foundation, 2021). Several government and low-fee private schools ended classes early for the year, which typically ends in March or April, while examinations were suspended (Ravi et al., 2021). A survey of head teachers conducted in 183 schools in Andhra Pradesh and Telangana found that 97% of public school heads reported that students did not have the technology they needed, compared with around 75% of private school heads. Yet 64% of private schools supported less than half of their students during school closures (Young Lives, 2020).

In Nepal, the online and distance learning efforts of most public schools and many private and NGO schools, especially those charging low fees, were largely ineffective, as most students did not have computers or televisions at home. A nationally representative survey found that 37% of households with children in school had cable television at home. According to National Assessment of Student Achievement data, 37% of grade 5 students in private schools had at least one computer at home while only 10% of public school students did (Acharya and Sharma, 2020). Most students in both private and community schools resorted to self-study using their textbooks, although 44% of those in private and 18% in community schools said they took part in online classes (UNICEF, 2021a).

Tertiary institutions that were more prepared for the move online were able to better cope with the crisis. In Afghanistan, top-tier private universities were reportedly better prepared to use distance education tools than public universities (Hatsaandh, 2022). In Sri Lanka, academic personnel of non-state institutions received more support to transition to online learning than those of public institutions. According to a personnel survey, 55% of faculty in non-state institutions said they were very well prepared, compared with 38% of their public peers. Public universities suffered greater delays in conducting distance examinations than some private universities (Institute of Policy Studies, 2022). But a common trend worldwide was that differences were more evident within than across sectors (Levy, 2020). In India, top-tier universities in both the state and non-state sectors were more likely to provide online education than lower-tier ones, which often had very poor infrastructure and resorted to using online platforms offered by government (Gupta, 2020).

THE PANDEMIC WAS A CATALYST FOR TECHNOLOGY USE IN EDUCATION

The education technology market expanded after the onset of COVID-19. In 2020, India's education technology sector received US$2.1 billion in investment, compared with US$1.7 billion in the 10 previous years combined (Press Trust of India, 2021). India currently has more than 9,000 active education technology companies (Srivastava, 2021). Bangladesh's education technology market is expected to grow to some US$729 million by 2025. The valuation of 10 Minute School, a Bangladeshi education technology provider, grew twelvefold in 2021 alone and its number of clients tripled; in 2022, it raised US$2 million through venture capital funds (Babu, 2022). Small-scale interventions also proliferated. In Nepal, Fuse Classroom aimed to bring classrooms together by using artificial intelligence to track student progress. Midas ecademy provided videos and virtual tutoring with a live instructor in Nepali, both for a fee. The service catered for students from both community and institutional schools (Institute of Integrated Development Studies, 2022). In Pakistan, Taleemabad, which provides cartoon-based mobile phone applications to teach the national curriculum in a more engaging visual way, expanded its subscriber base from 125,000 to over 1.5 million, with the largest growth in second- and third-tier cities (Malik and Hussain, 2022).

Even in countries where the growth of non-state actors in education had been controlled, private education technology actors collaborated with government providers to deploy their products in schools. The Bhutanese government signed a partnership agreement with LeapLearner in 2020 to integrate coding

into the Bhutanese curriculum. LeapLearner was to provide the content and teaching methods and training teachers to use the platform (LeapLearner, 2020).

The pandemic provided Byju's with a major growth opportunity. It launched School OS, an operating system for remote schooling (Bhalla, 2021). Byju's offers a range of services free for 15 days ('freemium') (Rajan, 2022). The number of users doubled to 100 million, while the number of subscribers increased by 1.8 times between 2020 and 2021 (Bhalla, 2021). As part of its expansion strategy, Byju's acquired other education technology companies and consolidated its influence in India and international markets. In the first half of 2021, it spent US$2 billion on acquisitions (The Economic Times, 2021). Most of its funders are international venture capital firms, such as the UBS Group and Blackstone, and include founders of companies such as Zoom and Facebook (Rai, 2021).

In Pakistan, some education service delivery programmes have offered hybrid and online services for schools (e.g. Knowledge Platform and Noon Academy, in addition to Taleemabad), coaching, supplementary tuition and professional development opportunities (e.g. Dot & Line, Science Fuse, Knowledge Platform, Learning Pitch, Edkasa and Maqsad) and learning assessments and preparation (e.g. Knowledge Platform, Edkasa and ITA). This is a new way non-state actors are dealing with lack of government financial support. Start-ups are exploring growing demand for diverse services and diversified innovative funding. An estimated US$10 million was raised in 18 months in seed funding from private investors (Malik and Hussain, 2022).

Government and private education technology collaboration has increased in Pakistan. Through the TeleSchool initiative, which provided an hour of schooling a day per grade on television, the federal government partnered with more than 300 non-state organizations that contributed content for the lessons (UNESCO and UNICEF, 2021b). The Knowledge Platform has reached 38,000 female students via 1,000 teachers across 75 public schools through the Jazz Smart Schools Programme. Federal education authorities aim to scale up this approach; the Knowledge Platform is expected to create 80 blended learning classrooms through infrastructure development backed by digital content, teacher training, support services and a new learning management system easily accessible to schools. During interviews, education technology providers and administrators expressed enthusiasm for the success of this model, arguing that such a change of mindset was only possible due to COVID-19, which forced federal and provincial authorities to quickly adapt to virtual technology (Malik and Hussain, 2022).

In Sri Lanka, technology provision in schools and the construction of smart classrooms have been a major outcome of partnerships with the private sector. The pandemic has also seen several non-state actors, including mobile service companies, banks, electronic device dealers, private companies and private tutors, stepping in to assist less privileged students. Stakeholders believe the pandemic may serve as a catalyst for the tertiary education sector, as it may open mindsets and attitudes towards different forms of learning and lead to greater collaboration between state and non-state sectors (Institute of Policy Studies, 2022).

However, it should be noted that solutions pushed by education technology companies neglect the fact that even teachers who are digitally skilled are seldom equipped to teach online (Jain et al., 2021). Teacher education providers also argued that criticisms of teacher mindset are problematic. It was estimated that about half of teachers may not use technology after being trained, since classrooms lack adequate electricity, devices, supportive institutions and colleagues (TISS, 2022).

COVID-19 TOOK A MAJOR TOLL ON PRIVATE SCHOOL FINANCES

Private unaided institutions, which rely on parental fees and were already in a precarious financial situation, took a heavy hit during COVID-19. In a survey conducted by the Indian School Finance Company, 87.5% of low-fee private school respondents reported struggling with fee collection. The National Independent Schools Alliance found that of the 3,690 low-fee private schools in its network, only 3.8% were able to collect more than 10% of the fees estimated for 2020/21. Between 2019/20 and 2020/21, there was a sharp rise in the default rate in the 1,052 schools for which fee data were collected for this report. Before the pandemic, most schools faced a default rate of 20% to 40%. After COVID-19 began, nearly all schools surveyed across five Indian states struggled with fee collection. In Haryana, the share of schools with a default rate greater than 31% rose from 56% to 87% (Centre for Civil Society, 2022). Schools ended up reducing staff and delayed paying salaries in their struggle to stay operational.

Interviews with private school proprietors in Nepal revealed that many schools were at risk of closure. In the initial phase of the pandemic, migrants and their children left for their villages, which affected many low-fee private schools. Some school principals

adjusted by charging students 50% of the school fees and paying their staff 50% of their salaries. Since most of these low-cost private schools rent their premises, they were not in a position to substantially reduce annual and admission fees (Institute of Integrated Development Studies, 2022).

Private provision of early childhood care and education services faced significant challenges, which were made worse by the absence of government financial support. In Bhutan, parents were reluctant to pay fees to private centres, as they were dissatisfied with the quality of online guidance provided to their children (Bhutan Ministry of Education, 2021). In Sri Lanka, where 85% of early childhood development centres are privately owned, many faced temporary or permanent closure due to falling enrolment and lack of government support during the pandemic (Save the Children, 2022).

Over-reliance on household funding has proved a challenge for tertiary education. In Afghanistan, the private universities union estimated private universities incurred an average loss of US$100,000 (Hatsaandh, 2022). In India, where non-state institutions cost more than public ones, fewer students were expected to cope with higher tuition fees, as the crisis squeezed household incomes (Gupta, 2020).

There were multiple reports in India of private school teachers losing jobs, having salaries cut or not being paid at all, resulting in drastic effects on their livelihood, mental health and motivation to teach. According to the Andhra Pradesh Private Teachers Association, more than 100,000 teachers had not received their salary over a period of a few months, as their schools had either shut or the owners were unable to pay their wages (Janyala, 2021). In a survey of 1,100 respondents that included parents, school administrators and teachers across 20 Indian states, teachers reported a salary cut averaging some 55%. Layoffs related to COVID-19 carried out by low-fee private schools resulted in staff shortages once schools reopened after the second wave of the pandemic. Schools in Bengaluru found it difficult to rehire teachers and suffered from a lack of teachers of good quality (News 18, 2021).

In Nepal, institutional school teachers and staff reported not having received salaries or adequate support for many months during school closures, leading to unions calling for the nationalization of institutional schools to ensure livelihoods (Education International, 2020). In Bangladesh, while government teachers continued receiving their pay and enjoyed job security, NGO teachers received between 60% and 80% of their salaries (UNESCO and UNICEF, 2021c). In Maldives, teachers supplementing their income with private tuition witnessed a decrease in income, even though government salaries continued, due to the loss of private tuition opportunity during COVID-19 lockdowns (UNICEF ROSA et al., 2021).

In general, the precarious situation of private schools was linked to the fact that parents could not afford private education, given the decrease in their incomes. Parents also expressed dissatisfaction with some private institutions' offerings during closures and chose to remove their children from them. In India, after the pandemic struck, almost all schools surveyed in five states for this report, apart from those in Jammu and Kashmir, suffered a substantial drop in enrolment. When asked why parents did not pay fees, 81% of schools in Andhra Pradesh reported that parents must have shifted their children to government schools, while respondents at 60% of schools in Assam argued that defaulting parents had shifted their children to other private schools that charged lower fees. About 70% of schools in Assam, Jammu and Kashmir and Telangana reported that parents who did not pay fees were likely to re-enrol their children once schools reopened. Respondents at nearly 70% of schools in Haryana believed parents had shifted their spending to private tuition and coaching.

According to media reports, some 90,000 private school students in Haryana moved to government schools in 2021/22, representing a 47% percent drop in private school enrolment, on top of a move of about 150,000 students to public institutions in 2020/21 (Rahar, 2021). Government schools in Tamil Nadu received 200,000 more admissions in 2021/22 than in the previous academic year (Times of India, 2021). In Gujarat, the shift of 61,000 students from private to government primary schools was the highest since 2014 (Sharma, 2021). Student migration from private to public schools could put an enormous strain on public schools, especially where public schools already have high pupil/teacher ratios and are overcrowded. For example, if 25% of all students in private unaided schools in urban India switched to public schools, it would increase the pupil/teacher ratio in urban public schools from 28:1 to 41:1, lowering the quality of teaching and learning (Alam and Tiwari, 2021).

The Annual Status of Education Report India reported that the share of 6- to 14-year-olds enrolled in public schools increased from 64% in 2018 to 70% in 2021 (**Figure 5.9a**). The shift from private to public institutions was most prominent in Kerala and Uttar Pradesh, where the increase was about 12 percentage

points (**Figure 5.10**). In rural Pakistan, the share of 6- to 14-year-olds enrolled in public schools increased slightly less, from 63.8% in 2018 to 65.4% in 2021 (**Figure 5.9b**). In Pakistan, non-state providers received no support from the government during the pandemic. Key interviews with representatives of the Private School Association for this report revealed that in fact private schools experienced tax increases that caused many to close (ITA, 2022).

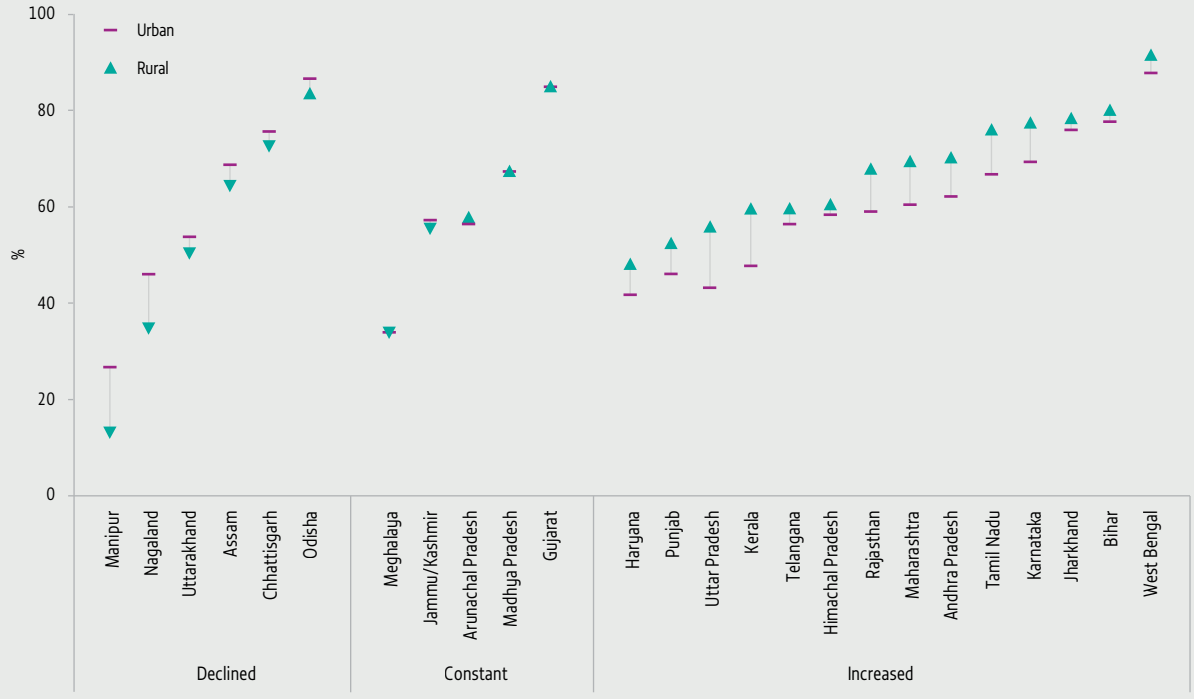
In several Indian states, government policies were viewed as not responsive to private school challenges. The Supreme Court asked private unaided schools to reduce fees, prevent fee increases or allow students to sit examinations even if they had not been able to pay their fees (Choudhary, 2021). The Uttar Pradesh government imposed a blanket restriction on schools of all types increasing their fees for the academic session (Jain, 2021). The Rajasthan state government directed private unaided schools to forgo 30% of tuition fees during the pandemic. While the Supreme Court ruled that such conditions could not be imposed, private schools were asked nevertheless to reduce fees, the claim being that operational costs went down due to school closures. In Chhattisgarh, more than 500 private schools shut down (News18, 2021). Private schools in many states reported delays in receiving reimbursements or subsidies from the government for affirmative action policies. The Independent English Schools' Association reported facing severe financial challenges due to the delay in these disbursements (Express News Service, 2021).

In Nepal, experts consulted for this report noted that the government is also perceived to have done little to help private schools during the pandemic. The government tried to impose a moratorium on fees, which disproportionately affected low-fee schools. Private school associations were called upon to mobilize their reserves. While many schools claimed not to be in a position to pay salaries, some observers argued that too many schools did not pay salaries even though they were able to do so (Institute of Integrated Development Studies, 2022).

FIGURE 5.9:
COVID-19 shifted enrolment from private to public schools in rural India and Pakistan
Enrolment status, 6- to 14-year-olds, 2018–21

Sources: ASER India and ASER Pakistan.

FIGURE 5.10:
Government school enrolment increased in a few states in India
Percentage of 6- to 14-year-olds enrolled in government schools, by Indian state, 2018–21



Source: ASER India.

CONCLUSION

Government decisions to finance non-state education directly or indirectly are based on desires to expand access to education and provide parents with choice. While most countries in the region finance non-government institutions in some way, such efforts are inadequate and have implementation problems, including delays. Some donors have played an important role in promoting policies that expand non-state provision. Philanthropic funding has increasing influence over education policy. Corporate social responsibility measures in India have expanded the availability of resources for non-state education.

With public education expenditure anaemic, mainly due to low domestic resource mobilization, households bear the brunt of the education financing burden. South Asia records the highest percentage of households in total education spending among world regions. Even public schools are not free, as households have to cover a range of costs, from uniforms to private supplementary tuition. Private schools' reliance on household financing helps cement inequality; they suffered particularly during the COVID-19 pandemic. In the absence of government support, many private schools lost students to the government system.

After-school tutoring at Subornogram International School in Bangladesh.

CREDIT: Matthew Becker

CHAPTER

6

Recommendations

There is a vast diversity of non-state activity in education. Non-state schools vary in terms of management, ownership, financing, motivation, profit orientation and fees charged. Moreover, the role of non-state actors extends well beyond provision of schooling to many other activities (e.g. learning assessments and supplementary tutoring), at various education levels (from young children receiving care to adults learning foreign languages) and through multiple channels of influence (e.g. from lobbying to research).

South Asia has had a long history of substantive engagement of diverse non-state actors in all these domains of activity, with particularly rapid recent growth in private enrolment. The prominent role of non-state actors in the region is a result of its social, political and economic challenges and education sector decision-making. Governments in the region also vary substantially in how they envision their role in education – with some viewing themselves as the sole provider and others seeking to encourage and facilitate private-sector and public–private partnership modalities.

Campaigns to accelerate mass education coincided with concerns about poor quality and weak governance issues. Meanwhile, parents increasingly aspired to provide any advantage to their children in a fiercely competitive labour market. Over time, private schooling expansion in urban and later rural areas led to middle-class flight from public schools, leaving it unclear whether quality or stratification was the real reason for the exodus. These developments, coupled with failure in government capacity to provide adequate education quality or develop adequate oversight mechanisms, led to trust in government to provide education being broken, and support for public education financing and provision being undermined.

In recent years, non-state actors have become visible for their role in other aspects of education beyond provision. Given the state's central responsibilities as duty bearer tasked with protecting and fulfilling the right to education, several questions arise regarding what non-state actors' roles ought to be in sharing responsibilities. For instance, should they fill existing state capacity gaps, or should they advocate and empower the state to act?

Well-designed partnerships between state and non-state actors within a facilitative regulatory framework, supported by political will, can help optimize the functions of education as a public good. State and non-state partnerships can be meaningfully fostered through regular dialogue. Improved coordination among actors in early childhood and technical and vocational institutions, as well as between government agencies, civil society and the private sector, is essential. For instance, to strengthen the teaching-learning ecosystem, there is a need for more systematic planning and dialogue between all stakeholders in the school ecosystem, state and non-state. Greater regional exchanges, networking and collaboration are a must to foster peer learning on harnessing the potential of non-state actors in South Asia.

Improved trust in government is a key means of ensuring equitable education of good quality and fruitful engagement by non-state actors. Strengthening the quality and reputation of government schools is the first step to help shift the discourse about the state's role in education. Government-led efforts to increase financing, information and transparency – as seen in pockets in the region – help signal political commitment to public education and equity. The resulting improvement in perceptions will also enhance trust in the ability to manage non-state activity. At the same time, improvement is also needed in non-state education institutions' financial transparency and inclusivity. Improved information and citizen engagement are the critical foundations for holding state and non-state actors to account.

Various aspects of government capacity must be improved to deal with non-state activity. Public administration personnel are overstretched. Processes and paperwork are bureaucratic. Capacity to use education data to improve planning is lacking. Clarity over division of responsibilities is another aspect that needs to be improved, regardless of governments' political and policy directions. Ultimately, governments need to forge a social compact centred on equity, quality and inclusion so that the entire education system – state and non-state – can collectively prepare learners to address current challenges such as climate change, declines in democratic governance and prevailing inequality.

This report's rallying call – Who chooses? Who loses? – is an invitation for policymakers to revisit and question relationships between state and non-state actors and deepen existing debates with an emphasis on equity and inclusion objectives. The following recommendations related to the role of non-state actors in education were framed and contextualized to South Asia to help #RightTheRules so that governments protect equity through financing, quality, governance, innovation and policymaking.

1. FULFIL THE COMMITMENT TO MAKE A YEAR OF PRE-PRIMARY AND 12 YEARS OF PRIMARY AND SECONDARY EDUCATION FREE. PUBLICLY FINANCED DOES NOT HAVE TO MEAN PUBLICLY PROVIDED IF EQUITY CAN BE ENSURED.

While governments have committed to providing free, publicly funded access to schooling, many countries in the region have never been close to achieving such levels of financing. In Pakistan, household spending as a share of GDP is almost the same as government spending. The inadequacy of government spending is usually compensated with households shouldering the financial cost through a range of fees – collected by public and private institutions – which can be especially burdensome for poor households.

Several countries in the region have recently committed to gradually increasing public spending as a share of GDP with benchmarks for 2025 and 2030. These benchmarks represent especially significant increases in Bangladesh and Sri Lanka. Meeting these financial commitments is a foundational condition for governments to ensure that state and non-state providers ensure the same minimum agreed conditions and standards for students irrespective of socioeconomic background.

However, any substantial commitment to increase financing should be complemented by government efforts to bolster the public sector's capacity to plan, absorb and dispense funds, and ensure proper oversight. Otherwise, existing governance challenges will greatly reduce the efficacy of any increased financing.

When governments financially support privately operated institutions, they need to ensure that the financing mechanisms are equitable. Contracting out management, subsidizing operational costs and funding households may not always reach those left the furthest behind. Careful regulation of fees and monitoring of commercialization are critical to limit exclusion.

The existing inequitable education financing system thus needs to be better monitored. This applies both to household out-of-pocket expenditure and to the distributional impact of government spending for all levels of education. Information on government spending and the design of financing mechanisms needs to be transparent and easily usable so stakeholders can hold governments accountable.

2. SET QUALITY STANDARDS THAT APPLY TO ALL STATE AND NON-STATE EDUCATION INSTITUTIONS AND IMPROVE STATE CAPACITY TO ENSURE THEIR APPLICATION.

While public schools in most countries in the region have worse student learning outcomes than private schools, the difference in student performance is greatly reduced after controlling for the students' socioeconomic conditions. The reality is further complicated by the diversity within public institutions and within private and other non-state institutions. The more fundamental challenge is that learning levels are low overall in global terms, which implies that there is a need to focus on improving quality across the board.

Governments need to establish quality standards on inputs, processes and results and efficiently apply them to all education institutions. Standards should help schools improve. Teachers need to be valued as professionals. Governments need to gradually address challenges such as segmented teacher labour markets and wide inequality in pay and conditions. Government acknowledgement of problems and efforts to improve public schooling quality is essential to ensure that similar standards are achieved in all types of schools.

Some non-state providers may enjoy considerable autonomy, for historical or cultural reasons, and be reluctant to accept scrutiny whether they are faith-based or profit-oriented. Government oversight through school inspections, evaluations and learning assessments should apply to all providers. State capacity to implement these mechanisms should be factored into their design.

Countries need stronger quality assurance processes in technical, vocational and tertiary education. As governments increasingly subsidize individuals or contract with companies to promote training, they need to protect the most disadvantaged, who are vulnerable to fraud, especially in the absence of achievable and enforceable standards.

3. ESTABLISH COMMON MONITORING AND SUPPORT PROCESSES THAT APPLY TO ALL STATE AND NON-STATE INSTITUTIONS.

Governments need a clear vision and framework of how they want to engage non-state actors, and communicate this vision through regulations on inputs, processes and results. They especially need to develop clear regulations on certain education system elements that influence the equity of teaching and learning, such as private tutoring, admission criteria and fees.

All education providers should be regulated as education entities under a common umbrella to facilitate coordination, information sharing and planning. Some providers are regulated as businesses in early childhood care and education, private tutoring and vocational training. This allows them to exist outside the regulatory control of education systems. Similarly, other providers are supervised only by social protection ministries or religious authorities. Such fragmentation of responsibilities can lead to gaps in authority and limit holistic treatment of the education system. Coordinated regulatory reach is necessary to collect comprehensive information on various aspects of non-state education providers at all levels of education to ensure that quality and standards of all providers are in line with national education goals.

Regulations need to be simple, transparent and efficient. They are currently viewed by providers in the region as being excessively focused on inputs and infrastructure requirements, as well as bureaucratically cumbersome, disincentivizing registration. Governments should work with non-state providers as partners to ensure that regulations focus on education processes and results related to health, safety, quality and equity. Regulations should be periodically reviewed and incrementally adjusted in a transparent and participatory way, inviting input from state and non-state institutions.

Governments need to build a relationship of trust with non-state providers, encouraging them to register, eliminating arbitrariness in rules and communicating the right incentives for them to run schools effectively for learners' benefit. Governments also need to protect children whose families have placed them in private schools and convey the message that they care for all children's education, irrespective of the type of school they attend. Governments must have oversight of all learners and cannot ignore those who are served by non-state providers.

Governments need to develop regulatory frameworks to prevent private tutoring from undermining the quality and equity objectives of the formal schooling system. In a region with an extremely competitive landscape for education and employment, online and offline private tutoring have greatly expanded. Countries need to monitor private tutoring prevalence, types and costs through household surveys. Policy responses could include remedial support and financing for those less likely to procure such services. The priority should be addressing the root causes of private tutoring demand and supply, such as low teacher pay, curriculum pressures and the high-stakes nature of final examinations.

4. FACILITATE THE SPREAD OF INNOVATION THROUGH THE EDUCATION SYSTEM FOR THE COMMON GOOD.

Policymakers should encourage the identification of good practices and innovation and give good ideas time and space to develop. Governments should use a consultative approach and work in partnership with all actors. Creating conditions and platforms for interaction and cooperation can help the education and training system benefit from differing sources of expertise and diverse viewpoints.

Governments need to nurture innovation in the systems they finance. They need to convey the message that they are committed to excellence. They should monitor learning and its determinants in all types of schools, evaluate where good practices are taking place, compile information about such practices, provide resources enabling practitioners to exchange experiences, pilot good ideas and scale them up. Governments need fresh ideas in education and should bring together those who can develop them. To achieve that, they need to train education officers and managers to be able to identify and develop such ideas. Governments also should look for lessons from non-state actors, especially on the use of autonomous and contextualized, flexible approaches to teaching and learning for marginalized learners. Knowledge sharing between state and non-state institutions should be promoted.

No one has a monopoly on good ideas in education. The government's role is to create the right environment to produce innovation. Governments need to provide the financing and incentives to foster education innovations that are especially relevant for marginalized groups and equity, as such innovations are often distinct from those that are primarily market focused.

5. MAINTAIN TRANSPARENCY, INCLUSIVITY AND INTEGRITY IN PUBLIC EDUCATION POLICY PROCESSES.

Government capacity to manage the diverse set of actors seeking to influence policy must be strengthened. All actors should have a genuine seat at the table. Communications with public officials about education legislation, policy and regulation should be transparent. Policymakers should be open to listening to multiple stakeholders.

To maintain the integrity of policymaking processes, a range of accountability and transparency measures need to be in place. These include open and inclusive consultations, legislative committee hearings, government

or court petitions, freedom of information acts promoting disclosure of donations to political parties and meetings with senior government officials, and rules against government officials who leave office taking positions from which they could derive private benefit, and against lobbyists and their sponsors taking public office.

References

CHAPTER 1

Acemoglu, D., Cheema, A., Khwaja, A. I. and Robinson, J. A. 2020. Trust in state and nonstate actors: Evidence from dispute resolution in Pakistan. *Journal of Political Economy,* Vol. 128, No. 8, pp. 3090–147.

Agarwal, A. and Narang, P. 2021. *National Education Policy 2020: One-time Comprehensive Evaluation.* New Delhi, Centre for Civil Society.

Alamgir, M. 2021. Draft Education Act at final stage: ban on guidebooks, corporal punishment. Dhaka, *The Daily Star.* www.thedailystar.net/frontpage/news/draft-education-act-final-stage-ban-guidebooks-corporal-punishment-2046369. (Accessed 14 February 2022.)

Altbach, P., de Wit, H. and Woldegiyorgis, A. A. 2021. *Public vs. Private Participation in Higher Education: Realities and Debates.* (Background paper for *Global Education Monitoring Report 2020.*)

Banerji, R. 2021. Learning for All: Lessons from ASER and Pratham in India on the role of citizens and communities in improving children's learning. S. Ra, S. Jagannathan and R. Maclean (eds). *Powering a Learning Society during an Age of Disruption*. Manila/Singapore, Asian Development Bank/Springer, pp. 181–94.

Barman, S. R. 2022. Edtech sector's self-regulation bid: how, why and why now. Noida, India, *The Indian Express*. https://indianexpress.com/article/explained/india-edtech-sector-self-regulation-7721488. (Accessed 13 May 2022.)

Batra, P. 2020. *NEP 2020: Undermining the Constitutional Education Agenda?* New Delhi, Sage India.

Bauluz, L., Govind, Y. and Novokmet, F. 2020. Global land inequality. https://halshs.archives-ouvertes.fr/halshs-03022360/document. (Accessed 13 May 2022.) (WID.world working paper 2020/10.)

Béteille, T., Tognatta, N., Riboud, M., Nomura, S. and Ghorpade, Y. 2020. *Ready to Learn: Before School, In School, and Beyond School in South Asia*. Washington, DC, World Bank. (South Asia Development Forum.)

Bharat Times. 2022. SFI, other left wing bodies to protest against PPP model proposal for schools. *Bharat Times*. https://news.bharattimes.co.in/sfi-other-left-wing-bodies-to-protest-against-ppp-model-proposal-for-schools. (Accessed 27 February 2022.)

Bhatta, P. and Pherali, T. 2017. *Nepal: Patterns of Privatisation in Education – A Case Study of Low-fee Private Schools and Private Chain Schools*. Brussels, Education International.

Bhatty, K. 2020. The National Education Policy on school education: putting the private before the public. *The India Forum*, 9 September.

Borkowski, A., Sunny, B. and Zapata, J. 2021. *Non-state Education in South Asia: Understanding the Effects of Non-state Actors on the Quality, Equity, and Safety of Education Service Delivery*. Florence, Italy, UNICEF Office of Research – Innocenti. (Innocenti Research Report.)

BRAC. 2022. *Nonstate Actors in Education: Exploring State-Nonstate Collaboration in Bangladesh*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)

Brezzi, M., González, S., Nguyen, D. and Prats, M. 2021. An updated OECD framework on drivers of trust in public institutions to meet current and future challenges. OECD Publishing, Paris, https://doi.org/10.1787/b6c5478c-en. (OECD Working Papers on Public Governance, No. 48.)

Centre for Civil Society. 2022. *Ease of Operations for Budget Private Schools in India*. (Background paper for GEM South Asia Regional Report 2022.)

Centre for Policy Research. 2022. *Regulation of Non-state Actors in School Education in India*. (Background paper for GEM South Asia Regional Report 2022.)

De Alwis, D. 2020. Minister agrees push to attract foreign branch campuses. London, *University World News*. www.universityworldnews.com/post.php?story=20200206134629885. (Accessed 1 February 2022.)

Edlund, J. and Lindh, A. 2021. *Popular Support for Public Education in Global Perspective*. Paris, UNESCO. (Background paper for *Global Education Monitoring Report 2021/2.*)

Goel, G. 2020. How Haryana made government school education a political priority. New Delhi, *The Print*. https://theprint.in/opinion/how-haryana-made-government-school-education-political-priority/350446. (Accessed 20 February 2022.)

Hanemann, U. 2021. *Non-state Actors in Non-formal Youth and Adult Education.* (Background paper for *Global Education Monitoring Report* 2021/2.)
Hatsaandh, A. 2022. *Non-State Actors' Involvement in Education in Afghanistan*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Hossain, N., Hassan, M. M., Rahman, M. A., Ali, K. S. and Islam, M. S. 2019. The politics of learning reforms in Bangladesh. S. Hickey and N. Hossain (eds), *The Politics of Education in Developing Countries: From Schooling to Learning*, Vol. 1, pp. 64–85.
India Ministry of Human Resource Development. 2020. *National Education Policy 2020*. New Delhi, Ministry of Human Resource Development.
India Today. 2016. 46 per cent of students in India are women. Noida, India, 27 October. www.indiatoday.in/education-today/news/story/46-per-cent-of-students-in-india-are-women-348837-2016-10-27. (Accessed 4 November 2021.)
Institute of Integrated Development Studies. 2022. *The Role of Non-state Actors in Education in Nepal*. (Background paper for GEM South Asia Regional Report 2022.)
Institute of Policy Studies. 2022. *Nonstate Actors in Education: A Case Study of Sri Lanka*. (Background paper for GEM South Asia Regional Report 2022.)
ITA. 2022. *Role of Non-state Providers of Education in Pakistan*. (Background paper for GEM South Asia Regional Report 2022.)
Mehendale, A. 2020. *Regulation of Private Schools in India*. New Delhi, Ofxam India.
Nambiar, D. 2022. *The Functioning and Regulation of Public–Private Partnerships in Skills Development: The Case of India*. (Background Study Partner paper for GEM South Asia Regional Report 2022.)
Narang, P. 2019. Deconstructing disdain for for-profit education. *Education World*, December.
Naseer, S. 2010. Building trust in government in South Asia. G. S. Cheema and V. Popovski (eds), *Building Trust in Government: Innovations in Governance Reform in Asia*. New York, United Nations University Press, pp. 113–33.
National Campaign for Education Nepal. 2017. *Short Report on Capacity Building Training on Advocacy for Budget, Privatization and HR mechanisms*. Paper for Capacity Building Training, Pokhara, National Campaign for Education Nepal.
Nepal Ministry of Education Non-Formal Education Centre. 2017. *Reading the Past, Writing the Future: A Report on National Literacy Campaign and Literate Nepal Mission*. Kathmandu, UNESCO.
OHCHR. 1999. *General Comment No. 13: The Right to Education*. New York, United Nations Committee on Economic, Social and Cultural Rights.
Paivandi, S. 2022. *Non-state Actors in Education in Iran: Select Issues and Contributions*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Paul, T. V. 2010. *South Asia's Weak States: Understanding the Regional Insecurity Predicament*. Redwood City, Calif., Stanford University Press.
Rama, M., Béteille, T., Li, Y., Mitra, P. K. and Newman, J. L. 2015. *Addressing Inequality in South Asia*. Washington, DC, World Bank. (South Asia Development Matters.)
Read, B. 2022. *The Electoral Logic of Education Privatization: Evidence from India*. Cambridge, Mass., Massachusetts Institute of Technology. (Working paper.)
Richards, J., Ahmed, M. and Islam, S. 2022. *The Political Economy of Education in South Asia: Fighting Poverty, Inequality and Exclusion.* Toronto, Ont., University of Toronto Press.
Right to Education Forum, Campaign against Child Labour and Alliance for Right to Early Childhood Development. 2018. *A Public Manifesto for the Education of India's Children*. New Delhi, Right to Education Forum/Campaign against Child Labour/Alliance for Right to Early Childhood Development.
Robinson-Pant, A., Binesse, H., Maleki, M. N., Millora, C. and Wang, Q. 2021. *Adult Literacy and Learning for Social Change: Innovation, Influence and the Role of Non-state Actors – Case Studies from Afghanistan, China, the Philippines and Senegal*. (Background paper for *Global Education Monitoring Report 2021/2.)*
RTE Forum. 2020. Status of Implementation of the Right of Children to Free and Compulsory Education Act 2009: A Report Card of the Last Decade (2010–2020). New Delhi, Right to Education Forum.
SAAPE. 2019. *Growing Inequality in South Asia: South Asia Inequality Report 2019*. Kathmandu, South Asia Alliance for Poverty Eradication.
Sahoo, N. 2019. Here's the syllabus Kejriwal govt followed to change the fate of Delhi's public schools. New Delhi, *The Print*. https://theprint.in/opinion/heres-the-syllabus-kejriwal-govt-followed-to-change-the-fate-of-delhis-public-schools/358777/2022.

Saleem, S. 2020. *Impact of Political Regimes on Education System of Pakistan*. Paper for GAI International Academic Conference, Istanbul, Turkey, 7–10 June.
Schofield, J. and Roder, D. C. 2022. *Non-state Actors in Education in Bhutan*. (Background paper for GEM South Asia Regional Report 2022.)
Skelton, A., Nolan, A., Mowbray, J., Kothari, J., Sepúlveda, M., Smirnova, M., Zinigrad, R., Fredman, S. and Epal Ratjen, S. 2019. *The Abidjan Principles: Guiding Principles on the Human Rights Obligations of States to Provide Public Education and to Regulate Private Involvement in Education*. Abidjan, Côte d'Ivoire.
Staniland, P. 2020. *Political Violence in South Asia: The Triumph of the State*. Washington, DC, Carnegie Endowment for International Peace. https://carnegieendowment.org/2020/09/03/political-violence-in-south-asia-triumph-of-state-pub-82641
UIL. 2019. *Fourth Global Report on Adult Learning and Education: Leave No One Behind – Participation, Equity and Inclusion*. Hamburg, Germany, UNESCO Institute for Lifelong Learning. (GRALE 4.)
UNESCO. 2015. *Incheon Declaration and Framework for Action for the Implementation of Sustainable Development Goal 4*. Paris, UNESCO.
___. 2021. *Global Education Monitoring Report 2021/2: Non-state Actors in Education – Who Chooses? Who Loses?* Paris, UNESCO.
Wadud, M. 2021a. Private universities oppose Australian 'study centre'. London, *University World News*. www.universityworldnews.com/post.php?story=20210528134020510. (Accessed 1 February 2022.)
___. 2021b. Private university owners, students oppose tax proposal. London, *University World News*. www.universityworldnews.com/post.php?story=20210611085221792. (Accessed 1 February 2022.)
Zahar, Z. and Khondker, K. 2017. From small to scale: the expansion of pre-primary in Bangladesh. *Early Childhood Matters*, pp. 61–65.

CHAPTER 2

Abayasekara, A. 2018. *Shadow Education in Sri Lanka*. Colombo, Institute of Policy Studies of Sri Lanka. www.ips.lk/wp-content/uploads/2018/04/PPT_24April.pdf. (Accessed 2 February 2022.)
ADB. 2015. *Innovative Strategies in Technical and Vocational Education and Training for Accelerated Human Resource Development in South Asia: Sri Lanka*. Manila, Asian Development Bank.
___. 2017. *Innovative Strategies for Accelerated Human Resource Development in South Asia: Public–Private Partnerships for Education and Training – Special Focus on Bangladesh, Nepal, and Sri Lanka*. Manila, Asian Development Bank.
Afghanistan Ministry of Education. 2016. *National Education Strategic Plan 2017–2021*. Kabul, Ministry of Education.
Ahmari, S. 2012. *The Epic, Secret Struggle to Educate Iran's Bahais*. Washington, DC, The Chronicle of Higher Education. www.chronicle.com/article/the-epic-secret-struggle-to-educate-irans-bahais. (Accessed 2 February 2022.)
Ahmed, J. U. 2015. Massification to Marketization of Higher Education: Private University Education in Bangladesh. *Higher Education for the Future*, Vol. 3, No. 1, pp. 76–92.
Ahmed, M., Rahaman, M., Rashid, M. and Ritu, S. 2015. *Quality Education: Teachers for the Next Generation*. Dhaka, Campaign for Popular Education (CAMPE).
Alam, M. B. and Zhu, Z. 2021. Private tutoring in Bangladesh: evolution, expansion, and policy responses. *International Journal of Comparative Education and Developmentî*, Vol. 24, No. 1, pp; 20–36.
Amin. 2020. Teacher Education in Iran: System, Review and Critics. *Studies in Literature and Language*, Vol. 20, No. 1, pp. 71–76.
Andrabi, T., Das, J. and Khwaja, A. I. 2008. A dime a day: the possibilities and limits of private schooling in Pakistan. *Comparative Education Review*, Vol. 52, No. 3, pp. 329–55.
Anjum, U. 2017. Assessing the need of modern education in madrassah system: a case study of madaris in Lahore. *Arts and Social Sciences Journal*, Vol. 8, No. 4, art. 1000286.
Arani, A. M. 2016. Researching private supplementary tutoring: methodological lessons from diverse cultures. *CERC Studies in Comparative Education*, Vol. 32, pp. 133–46.
Asadullah, M. N., Chakrabarti, R. and Chaudhury, N. 2015. What determines religious school choice? Theory and evidence from rural Bangladesh. *Bulletin of Economic Research*, Vol. 67, No. 2, pp. 186–207.
Asadullah, M. N. and Chaudhury, N. 2016. To madrasahs or not to madrasahs: the question and correlates of enrolment in Islamic schools in Bangladesh. *International Journal of Educational Development*, Vol. 49, pp. 55–69.

ASER Pakistan. 2020a. *Annual Status of Education Report (ASER) Pakistan: National (Rural)*. Lahore, Idara-e-Taleem -o-Aagahi.
___. 2020b. *Annual Status of Education Report (ASER) Pakistan: National (Urban)*. Lahore, Idara-e-Taleem-o-Aagahi.
Azmat, U., Muhammad, Y. and Jamil, M. 2021. Private tuition academies and the development of students' creative and critical skills: perspectives of academy managers. *International Journal of Social Sciences*, Vol. 9, No. 4.
Bahá'í International Community. 2005. *Closed Doors: Iran's Campaign to Deny Higher Education to Bahá'ís*. New York, Bahá'í International Community.
Bahá'í World News Service. 2019. *2019 in review: a year of historic developments*. Haifa, Israel, Bahá'í World News Service. https://news.bahai.org/story/1380. (Accessed 2 February 2022.)
Bakshi, P. 2020. *Unpacking Inclusion in Education: Lessons from Afghanistan for Achieving SDG 4*. (Background paper for *Global Education Monitoring Report 2020*.)
BANBEIS. 2019. *Bangladesh Education Statistics*. Dhaka, Bangladesh Bureau of Educational Information and Statistics.
Bangladesh Directorate of Primary Education. 2019. *Bangladesh Primary Education Annual Sector Performance Report 2019*. Dhaka, Directorate of Primary Education.
Banerjee, A. and Rathi, R. 2022. *How Byju's Became the Most Valued Startup of India?* https://startuptalky.com/byjus-learning-app-success-story. Bengaluru, India, StartupTalky. (Accessed 7 November 2022).
Bedasso, B., Crawfurd, L. and Hares, S. 2021. *Should Donors Invest in Private Schools? (And If So, How?)*. Washington, DC, Center for Global Development.
Béteille, T., Tognatta, N., Riboud, M., Nomura, S. and Ghorpade, Y. 2020. *Ready to Learn: Before School, In School, and Beyond School in South Asia*. Washington, DC, World Bank. (South Asia Development Forum.)
Bhalla, K. 2021. Byju's last two acquisitions and a deal with Disney reveal its American dream – one that is anchored in India. Gurgaon, India, *Business Insider India*. www.businessinsider.in/business/news/byjus-last-two-acquisitions-and-a-deal-with-disney-reveal-its-american-dream/articleshow/84783749.cms. (Accessed 7 November 2022).
Bhandary, S. 2017. JEE Advanced 2017: Bonus marks improved success rate in IIT entrance tests, say Mumbai experts. New Delhi, *Hindustan Times*, 14 June.
Bhatta, P. and Pherali, T. 2017. *Nepal: Patterns of Privatisation in Education – A Case Study of Low-fee Private Schools and Private Chain Schools*. Brussels, Education International.
Bhatta, S. D., Rahman, T., Rahman, M., Sharma, U. and Adams, L. 2020. *The Landscape of Early Childhood Education in Bangladesh*. Washington, DC, World Bank.
Bhatty, K. and Sundar, N. 2020. Sliding from majoritarianism toward fascism: Educating India under the Modi regime. *International Sociology*, Vol. 35, No. 6, pp. 632–50.
Bisht, M. 2018. Understanding the Challenges of Minority Communities in India: A Study of Educational Status of Muslims. *Journal of Exclusion Studies*, Vol. 8, No. 1, pp. 12–27.
Bollag, B. 1998. 36 Professors arrested in Iranian crackdown on underground Baha'i university. Washington, DC, *The Chronicle of Higher Education*. www.chronicle.com/article/36-professors-arrested-in-iranian-crackdown-on-underground-bahai-university. (Accessed 1 February 2022.)
BRAC. 2022. *Nonstate Actors in Education: Exploring State-Nonstate Collaboration in Bangladesh*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Byju's. 2022. *Products*. Bengaluru, India, Byju's. https://shop.byjus.com/collections/all?page=2. (Accessed 10 February 2022.)
CAMPE. 2005. *Education Watch Report 2003/4: Quality with Equity – The Primary Education Agenda*. Dhaka, Campaign for Popular Education.
___. 2014. *New Vision and Old Challenges: The State of Pre-primary Education in Bangladesh*. Dhaka, Campaign for Popular Education.
Cano, M. G., Murphy, C., Ahmed, M. F. and Suarez, H. 2018. *Final Evaluation of McGovern-Dole-Supported School Feeding Programme in Bangladesh (FFE-388-2014/048-00) March 2015 to December 2017 Evaluation Report*. Rome, World Food Programme.
CENTA. n.d. *Insights from Our Work*. Bengaluru, India, Centre for Teacher Accreditation. https://centa.org/insights. (Accessed 12 March 2022.)
Central Square Foundation. 2020. *State of the Sector Report: Private Schools in India*. New Delhi, Central Square Foundation/Omidyar Network India.
Centre for Civil Society. 2022. *Ease of Operations for Budget Private Schools in India*. (Background paper for GEM South Asia Regional Report 2022.)

Centre for Policy Research. 2022. *Regulation of Non-State Actors in School Education in India*. (Background paper for GEM South Asia Regional Report 2022.)
Chaudhary, V. 2021. Indian higher education edtech space is going to get bigger. Noida, India, *Financial Express*. www.financialexpress.com/education-2/indian-higher-education-edtech-space-is-going-to-get-bigger/2226744. (Accessed 10 February 2022.)
Chaudhry, K. 2021. Pakistani Christians protest nationalization of college. *Lahore, Pakistan, Union of Catholic Asian News*. www.ucanews.com/news/pakistani-christians-protest-nationalization-of-college/92861. (Accessed 27 January 2022.)
Cook, N. 2018. India all set for international education expansion. *International School*, Spring 2018, pp. 48–49.
Curran, N. M. and Jenks, C. 2022. Gig economy teaching: on the importance and dangers of self-branding in online markets. *Applied Linguistics*. https://doi.org/10.1093/applin/amac019.
Deka, K. 2021. The coaching game. Noida, India, *India Today*. https://www.indiatoday.in/magazine/nation/story/20200907-the-coaching-game-1716150-2020-08-29. (Accessed 12 February 2022.)Desjardins, R. 2019. The labour market benefits of adult education from a global perspective. *International Review of Education*, Vol. 65, No. 6, pp. 955–73.
ETF. 2020. *Public–Private Partnerships for Skills Development: A Governance Perspective – Volume I*. Turin, Italy, European Training Foundation.
Fayaz, R. 2022. Challenges edtech companies facing. Noida, India, *Financial Express*. https://thefinancialexpress.com.bd/education/challenges-edtech-companies-facing-1643827463. (Accessed 10 February 2022.)
FICCI and Nielsen India. 2016. *K-12 Book Publishing Market Report 2016*. New Delhi, Federation of Indian Chambers of Commerce and Industry/Nielsen India Private Limited.
Frontlist. 2019. Why textbooks published by educational publishers are better than NCERT. New Delhi, Frontlist, 14 October. www.frontlist.in/why-textbooks-published-by-educational-publishers-are-better-than-ncert. (Accessed 10 February 2022.)
Global Child Nutrition Foundation. 2021. *School Meal Programs around the World: Report Based on the Global Survey of School Meal Programs*. Seattle, Wash., Global Child Nutrition Foundation.
Global School Leaders. 2019. *Our Learnings 2019*. San Francisco, Calif., Global School Leaders.
Gujarat CSR Authority. 2018. *The Akshaya Patra Foundation: Unlimited Food For Education*. Ahmedabad, India, Gujarat Corporate Social Responsibility Authority.
Haidar, S. 2017. Access to English in Pakistan: Inculcating prestige and leadership through instruction in elite schools. *International Journal of Bilingual Education and Bilingualism*, Vol. 22, No. 7, pp. 833–48.
Hatsaandh, A. 2022. *Non-State Actors' Involvement in Education in Afghanistan*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Hayward, F. M. and Babury, M. O. 2015. The Struggle to Rebuild and Transform Higher Education in Afghanistan. *International Higher Education*, No. 81, pp. 18–20.
IFC. 2019. *Tackling Childcare: A Guide for Employer-Supported Childcare*. Washington, DC, International Finance Corporation.
IFC, Australian Aid and UNICEF. 2018. *Tackling Childcare: The Business Case for Employer-supported Childcare in Sri Lanka*. Washington, DC, International Finance Corporation.
IFC and Bright Horizons. 2019. *The Benefits and Challenges of a Workplace Creche: Employer-supported Childcare in India*. Washington, DC/Newton, Mass., International Finance Corporation/Bright Horizons Family Solutions.
ILO. 2019. *Quality Apprenticeships: Addressing Skills Mismatch and Youth Unemployment*. Geneva, Switzerland, International Labour Organization.
ILOSTAT. 2021. *SDG indicator 8.3.1: Proportion of informal employment in total employment by sex and sector (%)*. Geneva, Switzerland, International Labour Organization, ILOSTAT.
Indian Brand Equity Foundation. 2021. *Future of Ed-Tech in India*. New Delhi, India Brand Equity Foundation.
Institute of Integrated Development Studies. 2022. *The Role of Non-state Actors in Education in Nepal*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Institute of Policy Studies. 2021. *Non-state Actors in Education in Sri Lanka: A Country Study*. (Background paper for GEM South Asia Regional Report 2022.)
___. 2022. *Nonstate Actors in Education: A Case Study of Sri Lanka*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Iran Human Rights Documentation Center. 2011. *A Faith Denied: The Persecution of the Baha'is of Iran*. New Haven, Conn., Iran Human Rights Documentation Center.
Iran Press Watch. 2011. *BRFC Condemns Iranian Government Attack on Baha'i Education Initiative*. Manama, Iran Press

Watch. http://iranpresswatch.org/post/8044/brfc-condemns-iranian-government-attack-on-bahai-education-initiative. (Accessed 2 February 2022.)
Irfan, A., Karamchandani, A., Kohli, A. and Jain, V. 2017. *The Preschool Promise: The Opportunity to Transform Learning Outcomes for India's Working Poor*. Boston, Mass., FSG.
ISC Research. 2020. *Data and Intelligence*. Faringdon, UK, ISC Research.
ITA. 2022. *Role of Non-state Providers of Education in Pakistan*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Jangid, K. 2019. English admissions test excludes rural students from JNU. London, *University World News*. www.universityworldnews.com/post.php?story=20190611125933378. (Accessed 8 February 2022.)
Jayachandran, S. 2014. Incentives to teach badly: after-school tutoring in developing countries. *Journal of Development Economics,* Vol. 108, pp. 190–205.
Joshi, P. 2014a. Parent decision-making when selecting schools: the case of Nepal. *Prospects,* Vol. 44, No. 3, pp. 411–28.
___. 2014b. The public sector's experience and response to private competition: the case of Nepal. Ph.D. thesis, University of Pennsylvania.
___. 2020. Private Schooling and Tutoring at Scale in South Asia. Sarangapani, P. and Pappu, R. (eds), *Handbook of Education Systems in South Asia*. Singapore, Springer, pp. 1127–46.
Journals of India. 2020. Regulation of minority educational institutions. Bengaluru, India, *Journals of India*. https://journalsofindia.com/regulation-of-minority-educational-institutions. (Accessed 28 January 2022.)
Kaiser, C. 2017. *Market Overview: Pakistan's Emerging Book Publishing Industry*. Brooklyn, NY, Publishing Perspectives. https://publishingperspectives.com/2017/01/pakistan-market-overview-book-publishing.
Kalra, S. 2020. As demand for online education surges, publishers get innovative. Noida, India, *The Indian Express*. https://indianexpress.com/article/education/covid-impact-on-publishing-houses-traditional-books-online-learning-6375437. (Accessed 2 October 2022.)
Karim, A., Kabilan, M. K., Ahmed, Z., Reshmin, L. and Rahman, M. M. 2021. The medium of instruction in Bangladeshi higher education institutions: Bangla, English, or both? *Journal of Language, Identity & Education*, https://doi.org/10.1080/15348458.2020.1871353.
Kaul, V., Bhattacharjea, S., Chaudhary, A., Ramanujan, P., Banerji, M. and Nanda, M. 2017. *The India Early Childhood Education Impact Study.* New Delhi, UNICEF.
Kaushik, M. 2021. How we survived: S Chand, adapting to digital education. Mumbai, India, *Forbes India*. www.forbesindia.com/article/how-we-survived/how-we-survived-s-chand-adapting-to-digital-education/65569/1. (Accessed 2 October 2022.)
Khan, A. R. 2021. Preference for English, upper caste candidates: how UPSC 'biases' impact civil services exam. New Delhi, *The Wire*. https://thewire.in/rights/preference-for-english-upper-caste-candidates-how-upsc-biases-impact-civil-services-exam. (Accessed 2 October 2022.)
Khan, M. A. 2018. The status of early childhood education in Pakistan: inside stories. *Contemporary Issues in Early Childhood,* Vol. 19, No. 3, pp. 310–17.
Khan, Z. H. 2020. Pakistan minorities demand quota at top university. Karachi, Pakistan, *Union of Catholic Asian News*. www.ucanews.com/news/pakistan-minorities-demand-quota-at-top-university/89252. (Accessed 26 January 2022.)
Khanal, G. P. and Kapilvastu, N. 2020. English-medium schooling in the context of Nepal: a critical review. *Siddhartha Journal of Academics*, Vol. 2, pp. 22–31.
Khattak, S. 2014. A comparative analysis of the elite: English-medium schools, state Urdu-medium schools, and Dini-madaris in Pakistan. *International Journal of Multidisciplinary Comparative Studies,* Vol. 1, No. 1, pp. 92–107.
Khoso. 2021. Analyzing the rise of Pakistani startups. Los Angeles, Calif., *Emergent*. https://rademergent.com/c/analyzing-the-rise-of-pakistani-startups. (Accessed 2 September 2022.)
King, A. 2021. *Teacher Training in Bhutan with Dr. Phuntsho Dolma*. London, Zen Educate.
Kingdon, G. G. 2020. The private schooling phenomenon in India: a review. *The Journal of Development Studies,* Vol. 56, No. 10, pp. 1795817.
Kumar, N. 2020. The History of Education in South Asia: An Introduction. Sarangapani, P. M. and Pappu, R. (eds), *Handbook of Education Systems in South Asia*. Singapore, Springer, pp. 259–82.
Lakshman, A. 2022. COVID-19 lull over, students throng coaching capital Kota. Chennai, India, *The Hindu*. www.thehindu.com/news/national/covid-19-lull-over-students-throng-coaching-capital-kota/article65819030.ece. (Accessed 1 October 2022.)

Levy, D. 2006. The unanticipated explosion: private higher education's global surge. *Comparative Education Review,* Vol. 50, No. 2, pp. 217–40.
Lexlife. 2020. *What Are Minority Institutions?* Lucknow, India, Lexlife India. https://lexlife.in/2020/02/13/what-are-minority-institutions. (Accessed 28 January 2022.)
Maes, C. 2021. Jain Education in South Asia. Sarangapani, P. M. and Pappu, R. (eds), *Handbook of Education Systems in South Asia.* Singapore, Springer, pp. 71–99.
Maldives Ministry of Education. 2019. *Maldives Education Sector Analysis*. Malé, Policy Planning and Research Division, Ministry of Education.
Malik, A. and Hussain, M. 2022. *Providing a Scoping Overview of the Key Ancillary Service Markets that Affect the Teaching and Learning Process: the Case of Pakistan.* (Background Study Partner paper for GEM South Asia Regional Report 2022.)
Mariya, M. 2016. Researching Private Supplementary Tutoring: Methodological Lessons from Diverse Cultures. *CERC Studies in Comparative Education*, Vol. 32, pp. 117–31.
McGraw Hill India. 2022. *Our Innovative Digital Learning Solutions for Test Preparation: Guiding Your Unique Path to Growth*. Noida, India, McGraw Hill India. www.mheducation.co.in/test-preparation/learning-solutions. (Accessed 1 October 2022.)
Mehfooz, M. 2021. Religious Freedom in Pakistan: A Case Study of Religious Minorities. *Religions,* Vol. 12, No. 1, pp. 51–67.
Mehrotra, S. 2017. Technical and Vocational Education in Asia: What can South Asia Learn from East/South East Asia? *Indian Journal of Labour Economics,* Vol. 59, No. 4, pp. 529–52.
Miglani, N. and Burch, P. 2019. Educational technology in India: the field and teacher's sensemaking. *Contemporary Education Dialogue,* Vol. 16, No. 1, pp. 26–53.
Mishra, N. 2019. Schools continue to use pvt publishers' books. Chandigarh, India, *The Tribune*. www.tribuneindia.com/news/archive/chandigarh/schools-continue-to-use-pvt-publishers-books-707889. (Accessed 4 June 2021.)
Mishra, P., John, S., Khan, S. Y., Puthanveetil, R., Bachaspatimayum, M. and Nyangmi, M. G. 2020. *Inter-State Regional Consultative Workshop on Emerging Best Practices in Implementation of the Mid-Day Meal Scheme.* Thiruvananthapuram, India, Government of Kerala/IPE Global/World Food Programme India/Global Child Nutrition Foundation.
Moinipour, S. 2016. Iran's coming in from the cold but Bahá'ís are still frozen out. London, *Times Higher Education.* www.timeshighereducation.com/blog/irans-coming-cold-bahais-are-still-frozen-out. (Accessed 2 February 2022.)
Mousumi, M. A. and Kusakabe, T. 2019. The dilemmas of school choice: do parents really 'choose' low-fee private schools in Delhi, India? *Compare: A Journal of Comparative and International Education,* Vol. 49, No. 2, pp. 230–48.
Mufti, I. 2017. NCERT books full of errors, say Chandigarh schools. New Delhi, *Hindustan Times*, 20 February.
Mukit, S. H. 2020. Making sense of Bangladeshi ed-tech ecosystem (part 01). *LinkedIn*, 5 August.
Nambiar, D. 2022. *The Functioning and Regulation of Public–Private Partnerships in Skills Development: The Case of India*. (Background Study Partner paper for GEM South Asia Regional Report 2022.)
Nambissan, G. B. 2009. The Indian middle classes and educational advantage: Family strategies and practices. Apple, M. W., Ball, S. J. and Gandin, L. A. (eds), *The Routledge International Handbook of the Sociology of Education*. New York, Routledge, pp. 303–13.
___. 2021. *The Changing Urban and Education in Delhi: Privilege and Exclusion in a Megacity*. Bonn, Germany, Max Weber Foundation. (Education and the Urban in India Working Paper Series 2021/9.)
Nathan. 2019. Why are Karnataka's schoolchildren unhappy with the mid-day meal? Chennai, India, *The Hindu.*
National Statistical Office. 2020. *Household Social Consumption on Education in India: NSS 75th Round, July 2017–June 2018*. New Delhi, Ministry of Statistics & Programme Implementation.
OFPRA. 2019. *La communauté ahmadie*. Fontenay-sous-Bois, France, Office Français de Protection des Réfugiés et Apatrides.
Pachuashvili, M. 2009. The politics of higher education: governmental policy choices and private higher education in post-communist countries. Ph.D. thesis, Central European University, Budapest.
Paivandi, S. 2022. *Non-state Actors in Education in Iran: Select Issues and Contributions*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Pakistan NEMIS and AEPAM. 2021. *Pakistan Education Statistics 2017–18*. Islamabad, National Education Management Information System, Academy of Educational Planning and Management, Ministry of Federal Education and Professional Training.

PakistanToday. 2018. Parliamentary body rejects bill seeking quota for religious minorities in universities: report. Islamabad, *PakistanToday*. https://archive.pakistantoday.com.pk/2018/03/22/parliamentary-body-rejects-bill-seeking-quota-for-religious-minorities-in-universities-report. (Accessed 26 January 2022.)
Pallegedara, A. and Mottaleb, K. A. 2018. Patterns and determinants of private tutoring: the case of Bangladesh households. *International Journal of Educational Development,* Vol. 59, pp. 43–50.
Pathak, S. 2021. Pakistani edtech startup Maqsad raises $2.1m to make education more accessible. New Delhi, *EdTechReview*.
Pisani, L., Dyenka, K., Sharma, P., Chhetri, N., Dang, S., Gayleg, K. and Wangdi, C. 2017. Bhutan's national ECCD impact evaluation: local, national, and global perspectives. *Early Child Development and Care,* Vol. 187, No. 10, pp. 1511–27.
Pratham. 2022. *Early Childhood Education*. www.pratham.org/programs/education/early-childhood-education. (Accessed 1 May 2022.)
PWC and CII. 2021. *Reimagining Learning with Technology: Building Sustainable EdTech Businesses in India*. New Delhi, PricewaterhouseCoopers/Confederation of Indian Industry.
Rabab, S. 2021. 20 most promising education start-ups in Bangladesh. Dhaka, *United News of Bangladesh*, 7 June.
Radio Farda. 2020. *Baha'is barred from higher education in Iran*. Prague, Radio Farda. https://en.radiofarda.com/a/baha-is-barred-from-higher-education-in-iran/30970958.html. (Accessed 2 February 2022.)
Rahman, T. 2005. Passports to privilege: the English-medium schools in Pakistan. *Peace and Democracy in South Asia*, Vol. 1, No. 1, pp. 24–44.
Rajan, T. 2022. The unusual case of BYJU's: creating one of the world's most valued educational technology companies from India. *Indian Journal of Marketing*, Vol. 52, No. 4, pp. 8–23.
Rajbanshi, A. 2019. A madrasa blends traditional education with modern to keep up with the changing times. Kathmandu, *The Kathmandu Post*, 27 October.
Rao, N., Cohrssen, C., Chan, S. and Richards, B. 2020. *An Evaluation of the Early Childhood Care and Development Programme in Bhutan*. Thimphu, UNICEF Bhutan.
Rao, N., Ranganathan, N., Kaur, R. and Mukhopadhayay, R. 2021. Fostering equitable access to quality preschool education in India: challenges and opportunities. *International Journal of Child Care and Education Policy*, Vol. 15, art. 9. https://doi.org/10.1186/s40723-021-00086-6.
Rao, S. S. 2017. Production of an 'educational' city: Shadow education economy and re-structuring of Kota in India. Pink, W. T. and Noblit, G. W. (eds), *Second International Handbook of Urban Education*. Cham, Switzerland, Springer, pp. 417-43.
Ravi, S., Gupta, N. and Nagaraj, P. 2019. *Reviving Higher Education in India*. New Delhi, Brookings Institution India Center. (Brookings India Research Paper No. 112019-01.)
RMSA-TCA. 2016. *Private Tuition: Extent, Pattern and Determinants*. New Delhi, RMSA Technical Cooperation Agency, Ministry of Human Resource Development.
Roy, S., Huq, S. and Rob, A. B. A. 2020. Faith and education in Bangladesh: a review of the contemporary landscape and challenges. *International Journal of Educational Development,* Vol. 79, art. 102290.
S Chand and Company Ltd. 2021. *S. Chand Business Segments*. New Delhi, S Chand and Company Ltd. https://schandgroup.com/segments. (Accessed 8 June 2021.)
Saeed, S. and Bari, S. 2021. *Harvesting Philanthropy for Development and Education: Case from Pakistan*. Lahore, Pakistan, Idara-e-Taleem-o-Aagahi. www.norrag.org/app/uploads/2017/12/PiE_Inaugural_SymposiumSehar-SaeedHarvesting_Philanthropy_Development_Education_Pakistan.pdf. (Accessed 7 February 2022.)
Saif, S. K. 2018. Government moves to approve private university degrees. London, *University World News*. www.universityworldnews.com/post.php?story=20180224084659656. (Accessed 7 February 2022.)
Sarangapani, P. M. 2022. *Growth of Commercialisation in Pre-service Teacher Education in India.* Paper for Comparative and International Education Society Conference, Minneapolis, Minn., 18-22 April.
Schofield, J. and Roder, D. C. 2022. *Non-state Actors in Education in Bhutan*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Sedgwick, R. 2007. Private universities in Pakistan. New York, *World Education News and Reviews*. https://wenr.wes.org/2007/12/wenr-novemberdecember-2007-practical-information. (Accessed 1 February 2022.)
Sharifian, M. 2018. Early childhood education in Iran: progress and emerging challenges. *International Journal of the Whole Child,* Vol. 3, No. 1, pp. 30–37.
Sharma, K. 2022. Regular coaching no longer enough – UPSC aspirants opt for 'personal mentors' to crack exam.

New Delhi, *The Print*. https://theprint.in/india/education/regular-coaching-no-longer-enough-upsc-aspirants-opt-for-personal-mentors-to-crack-exam/1005646. (Accessed 18 October 2022.)
Sharma, Y. and Niazi, S. 2022. Universities face tighter rules on edtech collaboration. London, *University World News*. www.universityworldnews.com/post.php?story=20220129055208182. (Accessed 10 February 2022.)
Shougee, M. and Shareef, A. F. 2022. *Non-state Actors in Education in Maldives: Past, Present and Future Perspectives*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Siddiqui, N. 2017. Parental education as a determinant of school choice: A comparative study of school types in Pakistan. *Research in Education*, Vol. 99, No. 1, pp. 3–18.
Singh and Dayalani. 2020. *The Future of Ed-tech in India*. New Delhi, Inc42 Media.
Singh, A. K., Rind, I. A. and Sabur, Z. 2020. Continuous Professional Development of School Teachers. Sarangapani, P. M. and Pappu, R. (eds), *Handbook of Education Systems in South Asia*. Singapore, Springer, pp. 1355–80.
Sirois, G., Morales-Perlaza, A. and Dembélé, M. 2021. *La privatisation de la formation initiale des enseignants : cartographie et études de cas du phénomène en Afrique subsaharienne, Amérique latine et Asie du Sud [The Privatization of Initial Teacher Training: Mapping and Case Studies of the Phenomenon in sub-Saharan Africa, Latin America and South Asia]*. (Background paper for *Global Education Monitoring Report 2021/2*.)
Sivasubramaniam, M. 2020. *Philanthropic and Faith-based Non-state Actors in the Low-fee Private School Sector in the Global South: Blurring the Lines of Philanthropy and Enterprise*. (Background paper for *Global Education Monitoring Report 2021/2*.)
Small Media. 2013. *Knowledge as Resistance: The Baha'i Institute for Higher Education*. London, Small Media.
Smart, A. and Jagannathan, S. 2018. *Textbook Policies in Asia: Development, Publishing, Printing, Distribution, and Future Implications*. Manila, Asian Development Bank.
Srinivasaraju, S. 2020. Explainer: The Allegations against Akshaya Patra, and Why a Probe Is Needed. New Delhi, *The Wire*. https://thewire.in/government/akshaya-patra-trustees-resignation-explainer. (Accessed October 3 2022.)
Subramanian, V. K. 2018. From government to governance: Teach for India and new networks of reform in school education. *Contemporary Education Dialogue*, Vol. 15, No. 1, pp. 21–50.
Sultana, S. 2014. English as a medium of instruction in Bangladesh's higher education: empowering or disadvantaging students? *Asian EFL Journal*, Vol. 16, pp. 11–52.
Sunam, R. and Shrestha, K. 2019. Failing the most excluded: a critical analysis of Nepal's affirmative action policy. *Contributions to Nepalese Studies*, Vol. 46, No. 2, pp. 283–305.
Taylor, M. 2021. Neglected by the state, broken by the pandemic. Kathmandu, *The Record*, 13 July.
Teach For India. 2021. *Teach For India: Annual Report 2020-21*. Mumbai, India, Teach For India.
Thakur, N. 2022. Tested by Covid, online rivals and startups, Delhi's coaching centres hit the reset button. Mumbai, India, *Moneycontrol*, 27 February.
The Hindu. 2021. Tamil Nadu CM inaugurates colleges under HR&CE Dept. Chennai, India, *The Hindu*. www.thehindu.com/news/national/tamil-nadu/cm-inaugurates-colleges-under-hrce-dept/article37797868.ece. (Accessed 31 January 2022.)
Times of India. 2021. Only Hindus can be hired for colleges run by HR&CE department, Tamil Nadu govt tells Madras HC. Mumbai, India, *The Times of India*. https://timesofindia.indiatimes.com/home/education/news/only-hindus-can-be-hired-for-colleges-run-by-hrce-department-tamil-nadu-govt-tells-madras-hc/articleshow/87219226.cms. (Accessed 31 January 2022.)
TISS. 2022. *The Role of Non-state Actors in the Teaching Profession and Teacher Education in South Asia*. (Background Study Partner paper for GEM South Asia Regional Report 2022.)
Tshomo, P. 2017. *Early Childhood Care and Development in Bhutan: A Case for Investment*. Thimphu, Ministry of Education/UNICEF.
UCA News. 2018. India asked to establish universities for Christians. New Delhi, *Union of Catholic Asian News*. www.ucanews.com/news/india-asked-to-establish-universities-for-christians/81257. (Accessed 28 January 2022.)
UIS. 2021. *National Monitoring*. Montreal, Canada, UNESCO Institute for Statistics.
UNESCO. 2020. *The Impact of COVID-19 on ECCE Sector: Lesson Learned and Promising Practices from the Asia-Pacific*. Bangkok, UNESCO Regional Bureau for Education in Asia and the Pacific.
___. 2021. *No Teacher, No Class: State of the Education Report for India 2021*. New Delhi, UNESCO.
UNESCO New Delhi Office. 2020. *State of the Education Report for India 2020: Technical and Vocational Education and Training (TVET)*. New Delhi, UNESCO, New Delhi Cluster Office for Bangladesh, Bhutan, India, Nepal, the Maldives, and Sri Lanka.

USDOS. 2021. *2020 Report on International Religious Freedom: Pakistan*, US Department of State.
Varghese, N. V. and Panigrahi, J. (eds). 2019. *India Higher Education Report 2018: Financing of Higher Education*. New Delhi, SAGE India.
Vinayashree, J. 2017. NCERT: Delayed supply, poor print quality of NCERT books anger parents. Mumbai, India, *The Times of India*, 26 July.
Warnasuriya, R., Sosale, S. and Dey, S. 2020. *Integrating Early Childhood Care and Education in Sri Lanka: From Global Evidence to National Action*. Washington, DC, World Bank.
Wettewa, V. 2015. School choice: the case of Sri Lankan international schools. Ph.D. thesis, University of Sydney.
___. 2016. Postcolonial emotionalism in shaping education: an analysis of international school choice in Sri Lanka. *International Education Journal: Comparative Perspectives*, Vol. 15, No. 1, pp. 66–83.
Wettewa, V. and Bagnall, N. 2017. International school choice in Sri Lanka. *Current Politics and Economics of South, Southeastern, and Central Asia*, Vol. 26, No. 4, pp. 385–410.
WFP. 2020. *State of School Feeding Worldwide 2020*. Rome, World Food Programme.
World Bank. 2020. *Enterprise Surveys: Percentage of Firms Offering Formal Training*. Washington, DC, World Bank.
Yazdani, M. 2015. Higher education under the Islamic Republic: the case of the Baha'is. *Journal of Educational Controversy*, Vol. 10, No. 1, art. 7.
Zubairi, A., Halim, W., Kaye, T. and Wilson, S. 2021. *Country-level Research Review: EdTech in Pakistan*. London, EdTech Hub. (Working Paper.)

CHAPTER 3

Abayasekara, A. 2019. *Sri Lanka's Grade Five Scholarship Examination: An Evaluation of its Effectiveness and Relevance.* Colombo, Institute of Policy Studies of Sri Lanka.
Adhikary, R. W. and Lingard, B. 2018. A critical policy analysis of 'Teach for Bangladesh': a travelling policy touches down. *Comparative Education*, Vol. 54, No. 2, pp. 181–202.
Afridi, M. 2018. Equity and quality in an education public–private partnership: a study of the World Bank-supported PPP in Punjab, Pakistan. Oxford, UK, Oxfam International.
Ahmed, M. U. 2021. Eight thousands publications by Bangladeshi researchers in Scopus indexed journals in 2020. *Scientific Bangladesh*. https://scientificbangladesh.com/eight-thousands-publications-by-bangladeshi-researchers-in-scopus-indexed-journals-in-2020. (Accessed 2 February 2022.)
Alcott, B. and Rose, P. 2015. Schools and learning in rural India and Pakistan: who goes where, and how much are they learning? *Prospects*, Vol. 45, No. 3, pp. 345–63.
Andrabi, T., Das, J. and Khwaja, A. I. 2008. A dime a day: the possibilities and limits of private schooling in Pakistan. *Comparative Education Review*, Vol. 52, No. 3, pp. 329–55.
Ansari, A. H. 2020. Cream skimming? Evaluating the access to Punjab's public-private partnership programs in education. *International Journal of Educational Development*, Vol. 72, art. 102126.
Arunatilake, N. and Abayasekara, A. 2017. *Are There Good Quality Teachers for All Classrooms in Sri Lanka?* Colombo, Institute of Policy Studies of Sri Lanka.
ASER. 2020. *Annual Status of Education Report (Rural) 2019: 'Early Years'.* New Delhi, ASER Centre.
ASER Pakistan. 2020a. *Annual Status of Education Report (ASER) Pakistan: National (Rural).* Lahore, Pakistan, Idara-e-Taleem-o-Aagahi.
___. 2020b. *Annual Status of Education Report (ASER) Pakistan: National (Urban).* Lahore, Pakistan, Idara-e-Taleem-o-Aagahi.
___. 2021. *Learning Quality in the Katchi Abadis of Pakistan: Pilot Study*. Lahore, Pakistan, Idara-e-Taleem-o-Aagahi.
Asian Development Bank. 2012. *Private Higher Education across Asia: Expanding Access, Searching for Quality.* Manila, Asian Development Bank.
Aturupane, H., Glewwe, P. and Wisniewski, S. 2013. The impact of school quality, socioeconomic factors, and child health on students' academic performance: evidence from Sri Lankan primary schools. *Education Economics*, Vol. 21, No. 1, pp. 2–37.
Bajracharya, H. R. 2020. Nepal's Higher Education System and Policy. Sarangapani, P. M. and Pappu, R. (eds), *Handbook of Education Systems in South Asia*. Singapore, Springer, pp. 949–75.
Bangladesh Directorate of Primary Education. 2021. *Bangladesh Primary Education Statistics 2020: Annual Primary School Census 2020*. Dhaka, Directorate of Primary Education.

Barrera-Osorio, F., Blakeslee, D. S., Hoover, M., Linden, L., Raju, D. and Ryan, S. 2017. Leveraging the private sector to improve primary school enrolment: evidence from a randomized controlled trial in Pakistan. Unpublished, Harvard Graduate School of Education.

Barrera-Osorio, F. and Raju, D. 2015. Evaluating the impact of public student subsidies on low-cost private schools in Pakistan. *The Journal of Development Studies,* Vol. 51, No. 7, pp. 808–25.

Bedasso, B., Crawfurd, L. and Hares, S. 2021. *Should Donors Invest in Private Schools? (And If So, How?).* Washington, DC, Center for Global Development.

Berry, J. and Mukherjee, P. 2019. *Pricing of Private Education in Urban India: Demand, Use and Impact.* Cambridge, Mass., J-PAL.

Béteille, T., Tognatta, N., Riboud, M., Nomura, S. and Ghorpade, Y. 2020. *Ready to Learn: Before School, In School, and Beyond School in South Asia.* Washington DC, World Bank. (South Asia Development Forum.)

Bhatta, S. D., Rahman, T., Rahman, M., Sharma, U. and Adams, L. 2020. *The Landscape of Early Childhood Education in Bangladesh.* Washington, DC, World Bank.

Bhattacharya, L. 2022. *Changes in School Completion Rates of Children in India: Examining the Right to Education Act, 2009.* (*Global Education Monitoring Report* Fellowship Paper.)

Bhorkar, S. and Bray, M. 2018. The expansion and roles of private tutoring in India: from supplementation to supplantation. *International Journal of Educational Development,* Vol. 62, pp. 148–56.

Borkowski, A., Sunny, B. and Zapata, J. 2021. *Non-State Education in South Asia: Understanding the Effect of Non-State Actors on Quality, Equity, and Safety of Education Service Delivery.* Florence, Italy, UNICEF Office of Research – Innocenti. (Innocenti Research Report.)

BRAC. 2022. *Nonstate Actors in Education: Exploring State-Nonstate Collaboration in Bangladesh*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)

Bray, M. 2022. Teachers as tutors, and tutors as teachers: blurring professional boundaries in changing eras. *Teachers and Teaching*, Vol. 28, No. 1, pp. 64-77.

Burns, M. 2021. *Technology in Education*. (Thinkpiece for 2023 *Global Education Monitoring Report*.)

Central Square Foundation. 2020. *State of the Sector Report: Private Schools in India*. New Delhi, Central Square Foundation/Omidyar Network India.

___. 2021. *Reimagining Education through Technology: Central Square Foundation Database*. New Delhi, Central Square Foundation.

Centre for Civil Society. 2022. *Ease of Operations for Budget Private Schools in India*. (Background Study Partner paper for GEM South Asia Regional Report 2022.)

Centre for Policy Research. 2022. *Regulation of Non-state Actors in School Education in India*. (Background Study Partner paper for GEM South Asia Regional Report 2022.)

Chubb, J. E. and Moe, T. M. 1990. *Politics, Markets and America's Schools*. Washington, DC, The Brookings Institution.

Cole, R. 2017. Estimating the impact of private tutoring on academic performance: primary students in Sri Lanka. *Education Economics,* Vol. 25, No. 2, pp. 142–57.

Crawfurd, L. and Hares, S. 2021. *The Impact of Private Schools, School Chains and PPPs in Developing Countries.* (Background paper for *Global Education Monitoring Report 2021/2.*)

Damayanthi, B. W. R. 2018. Academic Performance of Students: the Effect of Class Room Level Factors and Private Tutoring. *American Journal of Educational Research,* Vol. 6, No. 3, pp. 262–69.

De Alwis, D. 2021. Uproar over attempt to 'privatise and militarise' HE. London, *University World News*. www.universityworldnews.com/post.php?story=20210629082733211. (Accessed 1 February 2022.)

Dongre, A. A. and Tewary, V. 2015. Impact of Private Tutoring on Learning Levels: Evidence from India. *Economic and Political Weekly*, Vol. 50, No. 41, pp. 72–80.

Dundar, H., Millot, B., Riboud, M., Shojo, M., Goyal, S. and Raju, D. 2017. *Sri Lanka Education Sector Assessment: Achievements, Challenges, and Policy Options*. Washington, DC, World Bank.

Fernandez-Stark, K. and Bamber, P. 2018. Skills development for economic and social upgrading: the case of Asian developing countries in the global value chains. Sakamoto, A. and Sung, J. (eds), *Skills and the Future of Work: Strategies for Inclusive Growth in Asia and the Pacific*. Bangkok, ILO Regional Office for Asia and the Pacific, pp. 62–97.

Flake, R., Kumar, P., Brings, C., Simelane, T. and Ta, M. 2017. *The Role of the Private Sector in Vocational and Educational Training: Developments and Success Factors in Selected Countries*. Bonn, Germany, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH. (Economic Policy Forum Working Paper.)

Frayer, L. and Pathak, S. 2019. *When Students in India Can't Earn College Admission on Merit, They Buy Their Way In.*

Washington DC, NPR. https://text.npr.org/745182272. (Accessed 28 January 2022.)
FSG. 2020. *Program to Improve Private Early Education (PIPE): Impact Assessment 2020.* Mumbai, India, FSG.
GCE. 2016. *Private Profit, Public Loss: Why the Push for Low-fee Private Schools Is Throwing Quality Education Off Track.* Johannesburg, Global Campaign for Education.
Gérard, E. 2020. *L'expansion de l'enseignement supérieur privé et le creusement des inégalités sociales: Analyses à partir de l'Argentine,de l'Inde, du Mexique, du Pérou,de la République Démocratique du Congo, du Sénégal, du Vietnam [The Expansion of Private Higher Education and Growing Social Inequalities: Analyses from Argentina, India, Mexico, Peru, the Democratic Republic of the Congo, Senegal, Viet Nam].* Paris, Agence française de développement. (Papier de recherche 156.)
Ghanooni, R. and Gholtash, A. 2019). Comparison of educational democracy, educational fatigue and civic skills in public and non-state schools. *New Approaches in Educational Management (Persian),* Vol. 10, No. 3, pp. 209–23.
Gholtaj, A., Taheri, A. M. and Marahel, F. 2015. Educational democracy and its effects on students' critical thinking and social skills in middle school. *Social Cognition*, Vol. 3, No. 2, pp. 95–108.
Ghosh, P. and Bray, M. 2020. School systems as breeding grounds for shadow education: factors contributing to private supplementary tutoring in West Bengal, India. *European Journal of Education,* Vol. 55, No. 3, pp. 342–60.
Golkar, S. 2015. The drive to control and Islamise universities. London, *University World News*. www.universityworldnews.com/post.php?story=20170627144826550. (Accessed 2 February 2022.)
Gruijters, R. J., Alcott, B. and Rose, P. 2021. Do private schools improve learning outcomes? Evidence from within-household comparisons in East Africa and South Asia. *Comparative Education Review*, Vol. 65, No. 4, pp. 640–66.
Gupta, A. 2021. Exposing the "shadow": an empirical scrutiny of the "shadowing process" of private tutoring in India. *Educational Review*. https://doi.org/10.1080/00131911.2021.1931038
Hamid, T. 2017. MoHE to review private universities students' degrees. Kabul, *TOLO News*. https://tolonews.com/afghanistan/mohe-review-private-universities-students%E2%80%99-degrees. (Accessed 8 February 2022.)
Hatsaandh, A. 2022. *Non-State Actors' Involvement in Education in Afghanistan*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Henry, O., Panirahi, J. and Sabharwal, N. S. 2020. *Enseignement supérieur et inégalités sociales en Inde [Higher education and social inequalities in India]*. Paris, Agence française de développement. (Papier de recherche 158.)
Herath, T. N. 2019. Public education versus private tutoring in Sri Lanka: who is contributing more? Paper for the 6th International Conference on Multidisciplinary Approaches, University of Sri Jayewardenepura.
India Ministry of Education. 2021. *National Initiative for Proficiency in Reading with Understanding and Numeracy (Nipun Bharat): Guidelines for Implementation.* New Delhi, Department of School Education and Literacy, Ministry of Education.
Institute of Integrated Development Studies. 2022. *The Role of Non-state Actors in Education in Nepal*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Institute of Policy Studies. 2021. *Non-state actors in education in Sri Lanka: A Country Study*. Colombo, Institute of Policy Studies. (Background paper for GEM South Asia Regional Report 2022.)
___. 2022. *Nonstate Actors in Education: A Case Study of Sri Lanka*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
ITA. 2022. *Role of Non-state Providers of Education in Pakistan*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Jasim, M. M. 2021a. UGC plans to warn students against admission to some private universities. Dhaka, *The Business Standard*. https://publisher.tbsnews.net/bangladesh/education/ugc-plans-warn-students-against-admission-some-private-universities-201034. (Accessed 27 January 2022.)
___. 2021b. UGC wants govt to appoint VCs to private universities. Dhaka, *The Business Standard*. www.tbsnews.net/bangladesh/education/ugc-wants-govt-appoint-vcs-private-universities-294673. (Accessed 9 February 2022.)
Jayachandran, S. 2014. Incentives to teach badly: after-school tutoring in developing countries. *Journal of Development Economics,* Vol. 108, pp. 190–205.
Joshi, P. 2014. Continuing to exercise choice after selecting a school: Insights into parent-decision making in local education markets in Nepal. *International Journal of Educational Development,* Vol. 37, pp. 57–67.
___. 2016. Experiencing and responding to private competition: the importance of subjectivity and intermediate

outcomes. *Comparative Education Review,* Vol. 60, No. 3, pp. 571–600.
___. 2018. Identifying and investigating the "best" schools: a network-based analysis. *Compare: A Journal of Comparative and International Education,* Vol. 48, No. 1, pp. 110-27.
___. 2020. Do private schools improve public school quality or increase stratification? *International Journal of Educational Development,* Vol. 77, art. 102219.
Karki, S., Aryal, P. N., Acharya, S., Dahal, M., Upadhyay, J., Ghimire, D. and Singh, K. 2018. *Evaluation of the National Early Childhood Development Program: Final Report*. Oxford, UK, Oxford Policy Management.
Kaul, V., Bhattacharjea, S., Chaudhary, A., Ramanujan, P., Banerji, M. and Nanda, M. 2017. *The India Early Childhood Education Impact Study.* New Delhi, UNICEF.
Kavoori, S.L. and Shubha, H.K. 2022. *How a Programme Contributed to Improving Learning Capabilities of Children of Migrant Labour.* Bengaluru, Azim Premji University. https://azimpremjiuniversity.edu.in/news/2022/lc-education-for-children-of-migrant-labour-programme-azim-premji-foundation. (Accessed 7 November 2022).
Kavoori, S. L. and Shubha, H. K. 2020. *Opportunities for Children of Migrant Labour.* Bengaluru, Azim Premji University.
Kingdon, G. G. 2017. The emptying of public schools and growth of private schools in India, *Report on Budget Private Schools in India 2017.* New Delhi, Centre for Civil Society, pp. 12 - 31.
Kshetree, A. K. 2020. Students' views on shadowing in English language learning. *Journal of NELTA Gandaki,* Vol. 3, No. 1–2, pp. 25–35.
LaRocque, N. I. and Sipahimalani-Rao, V. 2019. *Education Management Organizations Program in Sindh, Pakistan: Public–Private Partnership Profile*. Manila, Asian Development Bank. (ADB Brief 107.)
Le Grand, J. 2003. *Motivation, Agency, and Public Policy: Of Knights and Knaves, Pawns and Queens*. Oxford, UK, Oxford University Press.
Education International. 2010. *Early Childhood Education: A Global Scenario*. Brussels, Education International.
Mahmud, R. 2021. Learning in the shadows: parents' investments, family burden, and students' workload in Dhaka, Bangladesh. *Asia Pacific Education Review,* Vol. 22, No. 1, pp. 41–52.
Mariam, E., Ahmad, J. and Sarah Sarwar, S. 2021. BRAC Humanitarian Play Lab Model: Promoting Healing, Learning and Development for Displaced Rohingya Children. *Journal on Education in Emergencies*, Vol. 7, No. 1
Mashraky. 2019. *The Shadow Education System in Bangladesh: A Blessing or a Curse?* Paper for the International Conference of the Bulgarian Comparative Education Society, Sofia, 9–12 June.
Mehra, A. 2021. Rote learning and the destruction of creativity. *The India Forum*, 8 June. www.theindiaforum.in/article/rote-learning-school-snuffs-out-creativity? (Accessed 26 February 2022.)
Mehrotra, S. 2017. Technical and Vocational Education in Asia: What can South Asia Learn from East/South East Asia? *Indian Journal of Labour Economics*, Vol. 59, No. 4, pp. 529–52.
India Ministry of Women and Child Development. 2015. *Rapid Survey on Children (RSOC) 2013–14 National Report.* New Delhi, Ministry of Women and Child Development.
Mond, H. and Prakash, P. 2019. Motivations to set up and manage low-fee private schools in India. *Education Policy Analysis Archives*, Vol. 27, No. 134.
Mottaleb, K. A., Rahut, D. B. and Pallegedara, A. 2019. Spending privately for education in Nepal: Who spends more on it and why? *International Journal of Educational Development,* Vol. 69, pp. 39–47.
Muralidharan, K. and Sundararaman, V. 2015. The aggregate effect of school choice: Evidence from a two-stage experiment in India. *The Quarterly Journal of Economics,* Vol. 130, No. 3, pp. 1011–66.
Muzammil, M. 2019. Growth and Expansion of Private Higher Education. Varghese, N. V. and Panigrahi, J. (eds), *India Higher Education Report 2018: Financing of Higher Education*, New Delhi, SAGE India, pp. 339–62.
Nakata, S., Rahman, T. and Rahman, M. M. 2018. *Employability of Post-secondary TVET in Bangladesh: Tracking Survey of Graduates of Polytechnics*. Dhaka, World Bank.
Nambissan, G. B. 2009. The Indian middle classes and educational advantage: family strategies and practices. Apple, M. W., Ball, S. J. and Gandin, L. A. (eds), *The Routledge International Handbook of the Sociology of Education*. New York, Routledge, pp. 303–13.
News18. 2021. Rajasthan offers free coaching for UPSC, NEET, JEE, RSSB, applications closing today. Jaipur, India, *News18*. www.news18.com/news/education-career/rajasthan-offers-free-coaching-for-upsc-neet-jee-rssb-applications-closing-today-4241867.html. (Accessed 30 June 2022.)
News Minute. 2022. Karnataka announces free coaching for competitive exams like NEET, JEE. Bengaluru, *The News Minute*. www.thenewsminute.com/article/karnataka-announces-free-coaching-competitive-exams-neet-jee-161596. (Accessed 10 February 2022.)
Niazi, S. 2021a. New ministry rules set curbs on academic freedom online. London, *University World News*. www.

universityworldnews.com/post.php?story=20210203072713445. (Accessed 1 February 2022.)
___. 2021b. Uproar as key government critic quits university post. London, *University World News*. www.universityworldnews.com/post.php?story=20210324144131735. (Accessed 1 February 2022.)
Niti Aayog. 2021. *Systemic Transformation of School Education: The SATH-E Experience*. New Delhi, Niti Aayog.
Oyasu, K. 2019. Community based learning for sustainable development. *kult-ur*, Vol. 6, No. 11, pp. 39–62.
Paivandi, S. 2022. *Non-state Actors in Education in Iran: Select Issues and Contributions*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Pakistan Higher Education Commission. 2002. *Ordinance no. CXX of 2002: an Ordinance to constitute and restructure universities set up by the Federal Government*. Islamabad, Higher Education Commission. https://hec.gov.pk/english/universities/Pages/AJK/Illegal-DAIs.aspx. (Accessed 10 October 2022.)
___. 2022. *List of Fake, Illegal, Unlawful and Unrecognized Institutions in Punjab*. Islamabad, Higher Education Commission. https://hec.gov.pk/english/universities/Pages/AJK/Illegal-DAIs.aspx. (Accessed 27 January 2022.)
Pandey, S., Menezes, R. and Ganeti, S. 2017. Why Indian nonprofits are experts at scaling up. Stanford, Calif., *Stanford Social Innovation Review*. (Impact India 2.)
Pearson, D., Kennedy, F. C., Talreja, V., Bhat, S. and Newman-Taylor, K. 2021. Thriving in adversity: Do life skills programs work for developing world children? A pragmatic randomized controlled trial. *Social Behavior and Personality*, Vol. 49, No. 9, pp. 1–13.
Pisani, L., Dyenka, K., Sharma, P., Chhetri, N., Dang, S., Gayleg, K. and Wangdi, C. 2017. Bhutan's national ECCD impact evaluation: local, national, and global perspectives. *Early Child Development and Care*, Vol. 187, No. 10, pp. 1511–27.
Powar, K. B. 2015. India's Private Universities: Solutions or Problems? *International Higher Education*, Vol. 81, pp. 10–12.
Punjabi, S. 2020. Is shadow education becoming the 'new'formal? Effects of pedagogical approaches of IIT-JEE coaching on school education in the city of Delhi. *Contemporary Education Dialogue*, Vol. 17, No. 1, pp. 14–44.
Radio Farda. 2015. Iranian professors urge government to butt out. London, Radio Free Europe/Radio Liberty. www.universityworldnews.com/post.php?story=201505151110225. (Accessed 2 February 2022.)
Rajagopalan, S. and Agnihotri, V. 2014. *Establishing Benchmarks of Student Learning (2012–2013)*. West Lake Hills, Tex., Michael & Susan Dell Foundation/Educational Initiatives.
Rao, N., Cohrssen, C., Chan, S. and Richards, B. 2020. *An Evaluation of the Early Childhood Care and Development Programme in Bhutan*. Thimphu, UNICEF Bhutan.
Rao, S. S. 2017. Production of an 'educational'city: Shadow education economy and re-structuring of Kota in India. Pink, W. T. and Noblit, G. W. (eds), *Second International Handbook of Urban Education*, Cham, Switzerland, Springer, pp. 417–43.
Romero, M. and Singh, A. 2022. *The Incidence of Affirmative Action: Evidence from Quotas in Private Schools in India.* Oxford, UK, RISE. (RISE Working Paper 22-088.)
Ruthbah, U., Rabbani, A., Hossain, S. and Sarwar, G. 2015. Do extra hours of tutoring payoff? Evaluation of a community education programme in Bangladesh. *Journal of Development Effectiveness*, Vol. 8, No. 2, pp. 196–215.
Saif, S. K. 2021. Public universities closed, struggling to segregate genders. London, *University World News*. www.universityworldnews.com/post.php?story=20210916141622413. (Accessed 2 February 2022.)
___. 2022. Private higher education providers battle for survival. London, *University World News*. www.universityworldnews.com/post.php?story=20220114074119521. (Accessed 2 February 2022.)
Satari, S. and Ghanbari, S. 2016. Comparing the effectiveness of management in co-operator schools with public schools in Ardabil. *Journal of School Administration*, Vol. 4, No. 1, pp. 87–105.
Sathyan, S. and Karani, K. P. 2021. Byju's learning app in the COVID-19 outbreak to analyze online education: a case study. *International Journal of Case Studies in Business, IT, and Education*, Vol. 5, No. 2, pp. 75–86.
Schofield, J. and Roder, D. C. 2022. *Non-state Actors in Education in Bhutan*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Scholars at Risk. 2021. *Free to Think: Report of the Scholars at Risk Academic Freedom Monitoring Project*. New York, Scholars at Risk.
Seeber, M. 2016. Non-university Higher Education. Teixeira, P. N. and Shin, J. C. (eds), *The International Encyclopedia of Higher Education Systems and Institutions*. Dordrecht, Netherlands, Springer, pp. 2124–28.
Sharma, T. N., Nakarmi, C. B. N. and Koirala, B. 2019. *Review of the Current Situation of Technical Vocational Education and Training in Nepal 2019 with Respect to Policy Issues as per the Baseline Study 2018*. London, British Council. (Dakchyata – TVET Practical Partnership.)

Shougee, M. and Shareef, A. F. 2022. *Non-state Actors in Education in Maldives: Past, Present and Future Perspectives.* (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Siddiqui, K. 2022. Bangladesh rises in research publications, still not enough. Dhaka, *The Business Standard*. www.tbsnews.net/bangladesh/bangladesh-rises-research-publications-still-not-enough-356218. (Accessed 2 February 2022.)
Siddiqui, N. 2017. Socio-economic segregation of disadvantaged children between schools in Pakistan: comparing the state and private sector. *Educational Studies,* Vol. 43, No. 4, pp. 391–409.
Singh, R. 2020. *Teachers' Working Conditions in State and Non-state Schools.* (Background paper for *Global Education Monitoring Report 2021/2.)*
Smythe, C. 2021. Why the world's most valuable edtech startup Byju's is dogged by claims it "preys" on students. New York, *The Business of Business*. www.businessofbusiness.com/articles/why-the-worlds-most-valuable-edtech-startup-byjus-is-dogged-by-claims-it-preys-on-some-students. (Accessed 22 February 2022.)
Straubhaar, R. and Friedrich, D. 2015. Theorizing and documenting the spread of Teach For All and its impact on global education reform. *Education Policy Analysis Archives*, Vol. 23, No. 44.
Stromquist, N. P. 2018. *The Global Status of Teachers and the Teaching Profession.* Brussels, Education International.
Subedi, K. R. 2018. Shadow education: a role of private tutoring in learning. *International Journal of Humanities and Social Sciences,* Vol. 1, No. 2, pp. 29–42.
Subramanian, V. 2020. Parallel partnerships: Teach for India and new institutional regimes in municipal schools in New Delhi. *International Studies in Sociology of Education*, Vol. 29, No. 4, pp. 409–28.
Teixeira, P. N., Biscaia, R., Rocha, V. and Cardoso, M. F. 2016. What role for private higher education in Europe? Reflecting about current patterns and future prospects. Shah, M. and Nair, C. S. (eds), *A Global Perspective on Private Higher Education.* Amsterdam, Chandos Publishing, pp. 13–28.
The Hindu. 2019. RTE Rules amendment: SC seeks reply from Karnataka. Chennai, India, *The Hindu*. www.thehindu.com/news/national/karnataka/rte-rules-amendment-sc-seeks-reply-from-karnataka/article29141535.ece. (Accessed 31 March 2022.)
Ramakrishnan, S. 2018. Olympiad shows government school teachers as equally competent. Chennai, India, *The New Indian Express*. www.newindianexpress.com/states/tamil-nadu/2018/oct/06/olympiad-shows-government-school-teachers-as-equally-competent-1881840.html. (Accessed 13 January 2022.)
Times of India. 2022. 432 govt schools in Rajasthan to convert into English medium. Mumbai, India, *The Times of India*. https://timesofindia.indiatimes.com/home/education/news/only-hindus-can-be-hired-for-colleges-run-by-hrce-department-tamil-nadu-govt-tells-madras-hc/articleshow/87219226.cms (Accessed 31 January 2022.)
TISS. 2022. *The Role of Non-state Actors in the Teaching Profession and Teacher Education in South Asia.* (Background Study Partner paper for GEM South Asia Regional Report 2022.)
Tripathi, P. S. 2017. Intrusion into academic space. Chennai, India, *Frontline*. https://frontline.thehindu.com/cover-story/intrusion-into-academic-space/article9456785.ece. (Accessed 25 January 2022.)
Tripathy, S. and Devarapalli, S. 2021. Emerging trend set by a start ups on Indian online education system: a case of Byju's. *Journal of Public Affairs,* Vol. 21, No. 1.
UCEP Bangladesh. 2018. *UCEP TVET (Technical and Vocational Education and Training): Plumbing.* Dhaka, Under-privileged Children's Education Programme.
UNESCO. 2017. *Global Education Monitoring Report 2017/18: Accountability in Education – Meeting Our Commitments*. Paris, UNESCO.
___. 2020. *State of the Education Report for India 2020: Technical and Vocational Education and Training (TVET).* New Delhi, UNESCO, Cluster Office for Bangladesh, Bhutan, India, Nepal, the Maldives, and Sri Lanka.
___. 2021. *Global Education Monitoring Report 2021/2: Non-state Actors in Education – Who Chooses? Who Loses?* Paris, UNESCO.
University Grants Commission of India. 2021. *Fake Universities*. New Delhi, University Grants Commission. www.ugc.ac.in/page/Fake-Universities.aspx. (Accessed 26 January 2022.)
Wadud, M. 2019. More private than public university graduates land jobs. London, *University World News*. www.universityworldnews.com/post.php?story=20190601060927407. (Accessed 1 February 2022.)
Warnasuriya, R., Sosale, S. and Dey, S. 2020. *Integrating Early Childhood Care and Education in Sri Lanka: From Global Evidence to National Action*. Washington, DC, World Bank.
Whitebread, D., with Basilio, M., Kuvalja, M. and Verma, M. 2012. *The Importance of Play.* Brussels, Toy Industries of Europe.

Winthrop, R. 2018. *Leapfrogging Inequality: Remaking Education to Help Young People Thrive*. Washington, DC, Brookings Institution.
World Bank. 2015. *Labor Market Impacts and Effectiveness of Skills Development Programs in India*. Washington, DC, World Bank.
___. 2019. *Bangladesh Tertiary Education Sector Review: Skills and Innovation for Growth*. Washington DC, World Bank.

CHAPTER 4

Aiyar, Y. and Bhattacharya, S. 2016. The post office paradox: a case study of the block level education bureaucracy. *Economic and Political Weekly*, pp. 61–69.
Ambast, S. and Gaur, A. 2017. Legal developments. Sarin, A., Dongre, A. and Wad, S. (eds), *State of the Nation: RTE Section 12 (1) (C) 2017*. Ahmedabad/New Delhi, Indian Institute of Management/Centre for Policy Research/Central Square Foundation.
Amer, K. 2018. Tuition centres: a thriving business. Karachi, Pakistan, *Dawn*. www.dawn.com/news/1420255. (Accessed 10 October 2022.)
Anand, B. and Sudhakar, T. 2020. *Governance Challenges in K-12 Education in India: Evidence from Maharashtra, Delhi, Haryana, Jharkhand and Uttar Pradesh Legislation*. New Delhi, Centre for Civil Society.
Azim Premji University. 2021. *Issues in Education: Volume 1 – Teachers and Teacher Education*. Bengaluru, India, Azim Premji University. (Field Studies in Education.)
Bangladesh Ministry of Education and ILO. 2019. *Implementation of public–private partnerships in TVET*. Geneva, Switzerland, International Labour Organization.
Bangladesh University Grants Commission. 2018. *Strategic Plan for Higher Education in Bangladesh: 2018-2030*. Dhaka, University Grants Commission.
BBC. 2019. India tuition centre fire kills 20 in Gujarat state. New Delhi, *BBC News*. www.bbc.com/news/world-asia-48395247. (Accessed 2 September 2022.)
Béteille, T., Tognatta, N., Riboud, M., Nomura, S. and Ghorpade, Y. 2020. *Ready to Learn: Before School, In School, and Beyond School in South Asia*. Washington, DC, World Bank. (South Asia Development Forum.)
Bhatta, P. and Pherali, T. 2017. *Nepal: Patterns of Privatisation in Education – A Case Study of Low-fee Private Schools and Private Chain Schools*. Brussels, Education International.
Bhattarai, P., Bhatt, T. R., Rai, I. M. and Pradhanga, D. 2016. *A Study on Identification of Scientific Basis of Fee Structure in the Institutional Schools*. Kathmandu, National Institute for Development & Research.
Bhushan, R. 2020. Byju's WhiteHat Jr agrees to withdraw ads after ASCI flags code violation. Mumbai, India, The Economic Times. https://economictimes.indiatimes.com/industry/services/advertising/whitehat-jr-to-withdraw-ads-after-asci-flags-code-violation/articleshow/78899934.cms. (Accessed September 10 2022.)
BRAC. 2022. *Nonstate Actors in Education: Exploring State-Nonstate Collaboration in Bangladesh*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Centre for Civil Society. 2022. *Ease of Operations for Budget Private Schools in India*. (Background Study Partner paper for GEM South Asia Regional Report 2022.)
Centre for Policy Research. 2022. *Regulation of Non-state Actors in School Education in India*. (Background Study Partner paper for GEM South Asia Regional Report 2022.)
Charles, I. S. and Jain, A. 2022. The calm before the storm: How the upcoming data protection law will impact edtech in India. Hinsdale, Ill., *The National Law Review*. www.natlawreview.com/article/calm-storm-how-upcoming-data-protection-law-will-impact-edtech-india. (Accessed 14 August 2022.)
Day Ashley, L., Skinner, R., Meyer, A. and Perry, T. 2020. *Private Education and Disadvantaged Children in India: A Literature Review of Three Models of Private School Provision*. London, Save the Children.
Deccan Chronicle. 2014. Karnata minister wants to shut 1400 schools. Hyderabad, India, *Deccan Chronicle*. www.deccanchronicle.com/141030/nation-current-affairs/article/karnataka-minister-wants-shut-1400-schools. (Accessed 17 August 2021.)
Dongre, A., Sarin, A. and Singhal, K. 2019. *Understanding school choices under RTE's 25% mandate*. London/Oxford, Ideas for India. www.ideasforindia.in/topics/human-development/understanding-school-choices-under-rte-s-25-mandate1.html. (Accessed 17 August 2021.)
Dunbar, M. 2013. *Engaging the Private Sector in Skills Development*. Oxford, UK, Health & Education Advice and Resource Team (HEART).

Education World. 2019. PIL for fire safety in coaching centers in Delhi. Mumbai, India, *Education World*. www.educationworld.in/pil-seeks-fire-safety-in-coaching-centres-in-delhi-hc-asks-aap-govt-police-to-respond. (Accessed 10 October 2022.)
ETF. 2020. *Public–private Partnerships for Skills Development: A Governance Perspective – Volume I*. Turin, Italy, European Training Foundation.
Gannon, K. 2017. Islamic schools in Pakistan plagued by sex abuse of children. New York, *The Associated Press*. https://apnews.com/article/pakistan-middle-east-international-news-asia-pacific-islam-ddd9660f63ae4433966684823f79d3e9. (Accessed 17 August 2021.)
Goyal, Y. 2019. A policy to regulate coaching centres. Chennai, India, *The Hindu*. www.thehindu.com/opinion/op-ed/a-policy-to-regulate-coaching-centres/article28191289.ece. (Accessed 10 October 2021.)
Hatsaandh, A. 2022. *Non-state Actors' Involvement in Education in Afghanistan*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
ILO. 2019. *Sector Skills Councils*. Jakarta, International Labour Organization.
___. 2020. *Tripartite Sector Skills Bodies*. Geneva, Switzerland, International Labour Organization.
___. 2021. *A Resource Guide on Sector Skills Bodies*. Geneva, Switzerland, Skills & Employability Branch, International Labour Organization.
ILO and World Bank. 2017. *Industry Skill Councils in Bangladesh: Basic Information, Challenges and Opportunities*. Geneva, Switzerland, International Labour Organization.
India Comptroller and Auditor General. 2017. *Report of the Comptroller and Auditor General of India on Implementation of Right of Children to Free and Compulsory Education Act, 2009*. New Delhi, Comptroller and Auditor General.
India Ministry of Human Resource Development. 2012. *Vision of Teacher Education in India: Quality and Regulatory Perspective – Report of the High-Powered Commission on Teacher Education Constituted by the Hon'ble Supreme Court of India*. New Delhi, Ministry of Human Resource Development.
India Ministry of Education. 2021. Advisory to citizens regarding use of caution against ed-tech companies. New Delhi, Press Information Bureau. https://pib.gov.in/PressReleasePage.aspx?PRID=1784582. (Accessed 10 October 2022.)
Indus Action. 2018. *The Bright Spots: Status of Social Inclusion Through RTE Section 12(1)(c) 2018*. New Delhi, Indus Action.
___. 2019. *The Bright Spots: Status of Social Inclusion through RTE Section 12(1)(c) 2019*. New Delhi, Indus Action.
Institute of Integrated Development Studies. 2022. *The Role of Non-state Actors in Education in Nepal*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Institute of Policy Studies. 2022. *Nonstate Actors in Education: A Case Study of Sri Lanka*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
ITA. 2022. *Role of Non-state Providers of Education in Pakistan*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Iyer, G. and Counihan, C. 2018. When a right goes wrong: the unintended consequences of India's Right to Education Act. *Economic Affairs*, Vol. 38, No. 3, pp. 367–79.
Jasim, M. M. 2021. UGC wants govt to appoint VCs to private universities. Dhaka, *The Business Standard*. www.tbsnews.net/bangladesh/education/ugc-wants-govt-appoint-vcs-private-universities-294673. (Accessed 9 February 2022.)
___. 2022. Most private universities not abiding by law as govt fails to tighten grip. Dhaka, *The Business Standard*. www.tbsnews.net/bangladesh/education/most-private-universities-not-abiding-law-govt-fails-tighten-grip-367423. (Accessed 9 February 2022.)
Jha, J. 2019. Right to free and compulsory education in Nepal: a study with special reference to India's Right of Children to Free and Compulsory Education Act, 2009. *Dehradun Law Review*, Vol. 11, No. 1, pp. 41–57.
Joshi, P. 2020a. Private Schooling and Tutoring at Scale in South Asia. Sarangapani, P. and Pappu, R. (eds), *Handbook of Education Systems in South Asia*. Singapore, Springer, pp. 1127–46.
Joshi, R. 2020b. Can social integration in schools be mandated: evidence from the Right to Education Act in India. *International Journal of Educational Development*, Vol. 77. https://doi.org/10.1016/j.ijedudev.2020.102228.
Kaul, V. 2019. *A Mapping of Early Childhood Development Standards and Good Practices.* Kathmandu, UNICEF Regional Office for South Asia.
Kingdon, G. and Muzammil, M. 2018. *Per Pupil Expenditure in the Government Schools of Uttar Pradesh, and the Rate of Reimbursement to Private Schools under the Right To Education Act: An Update.* New Delhi, Centre for Civil Society.
Krishna, N. and Sharma, D. 2021. Making a case for a 'Goldilocks' regulation of the ed-tech sector. New Delhi, *The*

Bastion: Development in Depth. https://thebastion.co.in/politics-and/education/making-a-case-for-a-goldilocks-regulation-of-the-ed-tech-sector. (Accessed 5 January 2022.)
LaRoque, N. 2008. *Public–Private Partnerships in Basic Education: An International Review*. London, CfBT Education Trust. (Literature review.)
Malik, A. and Hussain, M. 2022. *Providing a Scoping Overview of the Key Ancillary Service Markets that Affect the Teaching and Learning Process: the Case of Pakistan.* (Background Study Partner paper for GEM South Asia Regional Report 2022.)
Mehendale, A. 2020. *Regulation of Private Schools in India: An Analyis of the Legal Frameworks.* New Delhi, Oxfam India.
Mehendale, A., Mukhopadhyay, R. and Namala, A. 2015. Right to education and inclusion in private unaided schools: an exploratory study in Bengaluru and Delhi. *Economic and Political Weekly*, Vol. L, No. 7, pp. 43–51.
Mehrotra, S. 2017. Technical and Vocational Education in Asia: What can South Asia Learn from East/South East Asia? *Indian Journal of Labour Economics*, Vol. 59, No. 4, pp. 529–52.
___. 2018. From the informal to the formal economy: skills initiatives in India. Sakamoto, A. and Sung, J. (eds), *Skills and the Future of Work: Strategies for Inclusive Growth in Asia and the Pacific*. Bangkok, ILO Regional Office for Asia and the Pacific.
Muzammil, M. 2019. Growth and expansion of private higher education. Varghese, N. V. and Panigrahi, J. (eds), *India Higher Education Report 2018: Financing of Higher Education*. New Delhi, SAGE India, pp. 339–62.
Nambiar, D. 2022. *The Functioning and Regulation of Public–private Partnerships in Skills Development: the Case of India*. (Background Study Partner paper for GEM South Asia Regional Report 2022.)
NCPCR. 2021. *Impact of Exemption under Article 15(5) w.r.t. Article 21A of the Constitution of India on Education of Children of Minority Communities*. New Delhi, National Commission for Protection of Child Rights.
Nesterova, Y. and Capsada-Munsech, Q. 2021. *National and Subnational Approaches to Regulating Private Technical and Vocational Education and Training: Comparative Insights from Asia and Africa.* (Background paper for *Global Education Monitoring Report 2021/2.*)
Paivandi, S. 2022. *Non-state Actors in Education in Iran: Select Issues and Contributions*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Pakistan Higher Education Commission. 2007. *Guidelines for the Establishment of a New University or an Institution of Higher Education*. Islamabad, Higher Education Commission.
Pakistan NACTE. 2009. *National Standards for Accreditation of Teacher Education Programs*. Islamabad, National Accreditation Council for Teacher Education.
___. 2016. *National Standards for Accreditation of Distance and Virtual Modes of Teacher Education Programs*. Islamabad, National Accreditation Council for Teacher Education.
Press Trust of India. 2020. Delhi govt to frame policy for coaching institutes; lay down norms for fees. New Delhi, *Business Standard*. www.business-standard.com/article/current-affairs/delhi-govt-to-frame-policy-for-coaching-institutes-lay-down-norms-for-fees-120101400734_1.html. (Accessed 10 October 2022.)
___. 2022. IAMAI sets up India Edtech Consortium to uphold code of conduct by edtech platforms. Chennai, India, *The Hindu*. www.thehindu.com/education/iamai-sets-up-india-edtech-consortium-to-uphold-code-of-conduct-by-edtech-platforms/article38248144.ece. (Accessed 10 October 2022.)
Rabbi, F. and Habib, S. 2019. Discourse on madrassa education reform in Pakistan: challenges to state narrative and its implications. *Al Basirah,* Vol. 8, No. 1.
Rahman, M. 2020. Teacher Education in Bangladesh: Curriculum Framework, Practices, Issues and Future Directions. Pushpanadham, K. (ed.), *Teacher Education in the Global Era*. Springer Singapore, pp. 145–55.
Ravi, S., Gupta, N. and Nagaraj, P. 2019. *Reviving Higher Education in India*. New Delhi, Brookings Institution India Center. (Brookings India Research Paper No. 112019-01.)
Raymond, R. 2019. Should international schools in Sri Lanka be regulated by the government? Colombo, *Roar Media*. https://roar.media/english/life/in-the-know/international-schools-sri-lanka-regulations. (Accessed 4 September 2022.)
Robinson-Pant, A., Binesse, H., Maleki, M. N., Millora, C. and Wang, Q. 2021. *Adult Literacy and Learning for Social Change: Innovation, Influence and the Role of Non-state Actors – Case Studies from Afghanistan, China, the Philippines and Senegal*. (Background paper for *Global Education Monitoring Report 2021/2.*)
RTE Forum. 2020. *Status of Implementation of the Right of Children to Free and Compulsory Education Act 2009: A Report Card of the Last Decade (2010–2020).* New Delhi, Right to Education Forum.
Sarasvati, N. T. 2020. How reservation in private schools isn't working for poor children. Mumbai, *India Spend*. www.indiaspend.com/how-reservation-in-private-schools-isnt-working-for-poor-children. (Accessed 10 October 2022.)

Sarin, A., Dongre, A. and Wad, S. 2017. *State of the Nation: RTE Section 12 (1) (C)*. Ahmedabad, Indian Institute of Management.
Schofield, J. and Roder, D. C. 2022. *Non-state Actors in Education in Bhutan*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Seldon, P. 2019. As private schools suffer two submit applications to surrender their schools to the government. Thimphu, *The Bhutanese*. https://thebhutanese.bt/as-private-schools-suffer-two-submit-application-to-surrender-their-schools-to-the-government. (Accessed 1 December 2020.)
Sharma, K. 2021. Only 16 states/UTs teach underprivileged kids for free in pvt schools, child rights body finds. New Delhi, *The Print*. https://theprint.in/india/education/only-16-states-uts-teach-underprivileged-kids-for-free-in-pvt-schools-child-rights-body-finds/763645. (Accessed 12 November 2021.)
Sharma Poudyal, C. 2017. Nepali private schools and tolerated illegality: A Foucauldian analysis of privatisation of education in Nepal. *Policy Futures in Education*, Vol. 15, No. 4, pp. 537–49.
Sharma, Y. and Niazi, S. 2022. Universities face tighter rules on edtech collaboration. London, *University World News*. www.universityworldnews.com/post.php?story=20220129055208182. (Accessed 10 February 2022.)
Shougee, M. and Shareef, A. F. 2022. *Non-state Actors in Education in Maldives: Past, Present and Future Perspectives*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Singh, A. 2021. Hard sells and 'toxic' targets: How Indian edtech giant Byju's fuels its meteoric rise. New York, *rest of world*. https://restofworld.org/2021/inside-india-edtech-byjus. (Accessed 12 February 2022.)
Singh, B. B. 2019. Private schools in Jajarkot defy scholarship provision. *Kathmandu Post*, 6 November.
Sirois, G., Morales-Perlaza, A. and Dembélé, M. 2021. *La privatisation de la formation initiale des enseignants : cartographie et études de cas du phénomène en Afrique subsaharienne, Amérique latine et Asie du Sud [The Privatization of Initial Teacher Training: Mapping and Case Studies of the Phenomenon in sub-Saharan Africa, Latin America and South Asia]*. (Background paper for *Global Education Monitoring Report 2021/2*.)
Sri Lanka National Education Commission. 2018. *National Policy on Technical and Vocational Education 2018*. Colombo, National Education Commission,.
Srivastava, P. and Noronha, C. 2014. Early private school responses to India's Right to Education Act: implications for equity. Macpherson, I., Robertson, S. L. and Walford, G. (eds), *Education, Privatisation and Social Justice: Case studies from Africa, South Asia and South East Asia*. Oxford, UK, Symposium Books. (Oxford Studies in Comparative Education.)
The Daily Star. 2020. 3 private universities fined for admitting students beyond limit. Dhaka, *The Daily Star*. www.thedailystar.net/city/news/3-private-universities-fined-admitting-students-beyond-limit-1859314. (Accessed 31 January 2022.)
Times of India. 2019. Supreme Court clarifies on RTE admissions for minority schools. Mumbai, *The Times of India*. https://timesofindia.indiatimes.com/city/ahmedabad/sc-clarifies-on-rte-admissions-for-minority-schools/articleshow/69589084.cms. (Accessed 14 March 2022.)
TISS. 2022. *The Role of Non-State Actors in the Teaching Profession and Teacher Education in South Asia*. (Background Study Partner paper for GEM South Asia Regional Report 2022.)
UNESCO-UNEVOC and Sri Lanka Tertiary and Vocational Education Commission. 2018. *TVET Country Profile Sri Lanka*. Bonn, Germany/Colombo, UNESCO International Centre for Technical and Vocational Education and Training/Sri Lanka Tertiary and Vocational Education Commission. https://unevoc.unesco.org/wtdb/worldtvetdatabase_lka_en.pdf. (Accessed 14 March 2022.)
UNESCO. 2020. *State of the Education Report for India 2020: Technical and Vocational Education and Training (TVET)*. New Delhi, UNESCO New Delhi, Cluster Office for Bangladesh, Bhutan, India, Nepal, the Maldives, and Sri Lanka.
UNICEF. 2016. *Violence against Children in Education Settings in South Asia*. Kathmandu, UNICEF Regional Office for South Asia.
University Grants Commission of Bangladesh. 2018. *Strategic Plan for Higher Education in Bangladesh: 2018–2030*. Dhaka, University Grants Commission.
Wad, S., Dongre, A. and Sarin, A. 2017. Lottery logic in the four states. Sarin, A., Dongre, A. and Wad, S. (eds), *State of the Nation: RTE Section 12 (1) (C) 2017*. Ahmedabad/New Delhi, Indian Institute of Management/Centre for Policy Research/Central Square Foundation.
Wadud, M. 2021. Private university owners, students oppose tax proposal. London, *University World News*. www.universityworldnews.com/post.php?story=20210611085221792. (Accessed 1 February 2022.)
Welch, A. 2021. *Private Higher Education in East and Southeast Asia: Growth, Challenges, Implications*. (Background paper for *Global Education Monitoring Report 2020*.)

World Bank. 2019. *Bangladesh Tertiary Education Sector Review: Skills and Innovation for Growth*. Washington, DC, World Bank.
Zafar, S. A. 2020. Learning in safety. Karachi, Pakistan, *The News International*. www.thenews.com.pk/print/686878-learning-in-safety. (Accessed 17 August 2021.)
Zaidi, S. M. A. 2013. *Madrassa Education in Pakistan: Controversies, Challenges and Prospects*. Oslo, Centre for International and Strategic Analysis.

CHAPTER 5

Acharya, S. P. and Sharma, U. 2020. Ensuring learning during the lockdown. Kathmandu, *myRepublica*. https://myrepublica.nagariknetwork.com/news/ensuring-learning-during-lockdown. (Accessed 10 December 2021.)
Acholla, D. A. 2020. *Low-fee Private Schooling: A Framework to Define the Scope of These Non-state Actors in Education*. (Background paper for *Global Education Monitoring Report 2021/2*.)
ADB. 2018. *People's Republic of Bangladesh: Secondary Education Sector Investment Program – Tranche 3*. Manila, Asian Development Bank.
Afridi, M. 2018. Equity and quality in an education public–private partnership: a study of the World Bank-supported PPP in Punjab, Pakistan. Oxford, UK, Oxfam International.
Agarwal, M. 2019. Why do edtech startups fail in India? Here's what investors think! New Delhi, *Inc42*. https://inc42.com/features/why-do-edtech-startups-fail-in-india-heres-what-investors-think. (Accessed 2 November 2022.)
___. 2020. Edtech investor landscape: Which VCs are backing the edtech revolution in India? New Delhi, *Inc42*. https://inc42.com/datalab/edtech-investor-landscape-which-vcs-are-backing-the-edtech-revolution-in-india. (Accessed 2 November 2022.)
Ahmed, Z. S. and Shahzad, R. 2021. The role of peace education in countering violent extremism in Pakistan: an assessment of non-governmental efforts. *Conflict, Security & Development*, Vol. 21, No. 3, pp. 199–222.
Alam, A. and Tiwari, P. 2021. *Implications of COVID-19 for Low-cost Private Schools*. New York, UNICEF. (Issue brief 8.)
Andrabi, T., Das, J., Khwaja, A. I., Ozyurt, S. and Singh, N. 2020. Upping the ante: the equilibrium effects of unconditional grants to private schools. *American Economic Review*, Vol. 110, No. 10, pp. 3315–49.
Arani, A. M., Kakia, L. and Taghavi, T. 2015. Privatization of education in the Islamic Republic of Iran: One step forward, one step back. *Cogent Education*, Vol. 2, No. 1, art. 1029709.
ASER. 2021. *Annual Status of Education Report (Rural) 2020 Wave 1*. New Delhi, ASER Centre.
Aslam, M. and Kingdon, G. G. 2021. Public–private partnerships in education: Do they offer an equitable solution to education in India and Pakistan? Rose, P., Arnot, M., Jeffery, R. and Singal, N. (eds), *Reforming Education and Challenging Inequalities in Southern Contexts*. New York, Routledge, pp. 79–97.
Azim Premji Foundation. 2021. *The Loss of Learning for Children during the Pandemic*. Bangalore, India, Azim Premji Foundation. (Field Studies in Education.)
Babu, M. U. 2022. Bangladesh set for an EdTech revolution. Dhaka, *The Business Standard*. www.tbsnews.net/tech/bangladesh-set-edtech-revolution-360985. (Accessed 6 January 2022.)
Bangladesh Ministry of Education. 2018. *Pocket Book on Bangladesh Education Statistics 2017*. Dhaka, Bangladesh Bureau of Educational Information and Statistics, Ministry of Education.
Baral, M. 2018. Vidya Lakshmi, government run education loan portal: 10 things to know. New Delhi, *NDTV*. www.ndtv.com/education/vidya-lakshmi-government-run-education-loan-portal-10-things-to-know-1856402. (Accessed 26 January 2022.)
Bavadharini, K. S. 2018. Vidya Lakshmi is the gateway to education loans. Chennai, India, *The Hindu BusinessLine*. www.thehindubusinessline.com/portfolio/news-analysis/vidya-lakshmi-is-one-stop-portal-for-education-loans/article23424333.ece. (Accessed 26 January 2022.)
Bedasso, B., Crawfurd, L. and Hares, S. 2021. *Should Donors Invest in Private Schools? (And If So, How?)*. Washington, DC, Center for Global Development.
Bhalla, K. 2021. *Byju's last two acquisitions and a deal with Disney reveal its American dream – one that is anchored in India*. Gurgaon, India, *Business Insider India*. www.businessinsider.in/business/news/byjus-last-two-acquisitions-and-a-deal-with-disney-reveal-its-american-dream/articleshow/84783749.cms. (Accessed 16 April 2022.)
Bhatta, S. D., Rahman, T., Rahman, M., Sharma, U. and Adams, L. 2020. *The Landscape of Early Childhood Education in Bangladesh*. Washington, DC, World Bank.

Bhattarai, P., Bhatt, T. R., Rai, I. M. and Pradhanga, D. 2016. *A Study on Identification of Scientific Basis of Fee Structure in the Institutional Schools*. Kathmandu, National Institute for Development & Research.
Bhutan Ministry of Education. 2021. *Annual Education Statistics, 2021.* Thimphu, Ministry of Education.
LeapLearner.. 2020. Global ed-tech leader, LeapLearner, brings coding education to every child in Bhutan. Washington, DC, EIN Newswires. (News release.)
Bhutani Vij, A. 2020. The neoliberal agenda of workplace learning in NGOs: contestation, narratives and resistance. *Studies in Continuing Education*, Vol. 43, No. 2, pp. 208–22.
Biswas, S. 2020. Why schools are at the centre of Delhi polls. New Delhi, *BBC News*. www.bbc.com/news/world-asia-india-51353525. (Accessed 12 October 2022.)
Borkowski, A., Sunny, B. and Zapata, J. 2021. *Non-State Education in South Asia: Understanding the Effect of Non-State Actors on Quality, Equity, and Safety of Education Service Delivery*. Florence, Italy, UNICEF Office of Research – Innocenti. (Innocenti Research Report.)
Boston Consulting Group. 2021. *School Education Reforms in Delhi 2015–2020*. New Delhi, Boston Consulting Group.
BRAC. 2022. *Nonstate Actors in Education: Exploring State-Nonstate Collaboration in Bangladesh*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Centre for Civil Society. 2022. *Ease of Operations for Budget Private Schools in India*. (Background Study Partner paper for GEM South Asia Regional Report 2022.)
Centre for Policy Research. 2022. *Regulation of Non-state Actors in School Education in India*. (Background Study Partner paper for GEM South Asia Regional Report 2022.)
Chhetri, S. 2021. 1.6 lakh Delhi students move from private to government schools. Mumbai, India, *The Times of India*. https://timesofindia.indiatimes.com/city/delhi/1-6-lakh-delhi-students-move-from-private-to-government-schools/articleshow/86180624.cms. (Accessed 8 January 2022.)
Chitra, R. 2019. Education loans in India shrink 25% in 4 yrs. Mumbai, India, *The Times of India*. https://timesofindia.indiatimes.com/business/india-business/edu-loans-in-india-shrink-25-in-4-yrs/articleshow/69490291.cms. (Accessed 31 January 2022.)
Choudhary, A. A. 2021. Schools must reduce fees for online-only classes: Supreme Court. Mumbai, India, *The Times of India*. https://timesofindia.indiatimes.com/india/schools-must-reduce-fees-for-online-only-classes-supreme-court/articleshow/82377796.cms. (Accessed 5 January 2022.)
Crawfurd, L. and Hares, S. 2021. *The Impact of Private Schools, School Chains and PPPs in Developing Countries*. (Background paper for *Global Education Monitoring Report 2021/2*.)
Crawfurd, L., Hares, S. and Minardi, A. L. 2021. *New Data on Learning Loss in Pakistan*. Washington, DC, Center for Global Development.
CSRBOX. 2022. *India Education CSR Outlook Report FY 2016–17 to 2020–21*. Ahmedabad, India, CSRBOX.
Dahal, S. K. 2020. Unequal access to TVET programmes in Nepal: Impact of neo-liberalism. *Journal of Education and Research,* Vol. 10, No. 1, pp. 81–99.
De Alwis, D. 2020. Minister agrees push to attract foreign branch campuses. London, *University World News*. www.universityworldnews.com/post.php?story=20200206134629885. (Accessed 1 February 2022.)
Demirgüç-Kunt, A., Klapper, L., Singer, D. and Van Oudheusden, P. 2014. *Global Findex Database 2014: Measuring Financial Inclusion around the World.* Washington, DC, World Bank.
Ecorys. 2019a. *Independent Evaluation of the UK Department for International Development's Development Impact Bonds (DIBs) Pilot Programme.* London, Department for International Development.
___. 2019b. *Quality Education India Development Impact Bond: A Case Study Produced as Part of the Independent Evaluation of the Department for International Development's Development Impact Bond Pilot Programme.* London, Department for International Development.
Edex Live. 2021. Parents and school management criticise AP government's decision to take over aided schools. *Edex Live*, 29 October.
Education International. 2022. *Nepal: Education Union Fights for Private Teachers and Education Staff Unpaid or Dismissed during Pandemic*. Brussels, Education International. www.ei-ie.org/en/item/23507:nepal-education-union-fights-for-private-teachers-and-education-staff-unpaid-or-dismissed-during-pandemic. (Accessed 9 July 2022.)
Edwards Jr, D. B., Rappeport, A., Sperduti, V. and Caravaca, A. 2021. *The Influence of the World Bank on Policy Formation, Policy Implementation, and Private Education: A Systematic Review of the Literature. (Background paper for Global Education Monitoring Report 2021/2.)*
Edwards, S. 2019. *World's Largest Education DIB Reports First-year Results*. Washington, DC, Devex. (Development Finance.)

Express News Service. 2021. Schools willing to shut down if government doesn't act against fee defaulters, pay RTE reimbursement: IESA. Noida, India, *The Indian Express*. https://indianexpress.com/article/cities/pune/schools-willing-to-shut-down-if-government-doesnt-act-against-fee-defaulters-pay-rte-reimbursement-iesa-7392238. (Accessed 10 November 2021.)
Fernando, A. A. J. 2018. Environmental and socially related CSR practices in Sri Lanka: insights from annual report disclosures. (Unpublished.)
Genoni, M. E., Bhatta, S. D. and Sharma, U. 2019. Equity in education outcomes and spending in Bangladesh. *The Bangladesh Development Studies*, Vol. 42, No. 2/3, pp. 217–62.
Global Alliance for Tax Justice, PSI and Tax Justice Network. 2021. *The State of Tax Justice 2021*. Bristol, UK, Tax Justice Network.
Gollerkeri, G. Pandey, S; Kizhpadathil, A. and Sai Sidharth, M. 2021. *Public Affairs Index 2021*. Bengaluru, Public Affairs Centre.
Govinda, R. 2017. *CONFINTEA VI Mid-Term Review 2017: The Status of Adult Learning and Education in Asia and the Pacific*. Hamburg, Germany, UNESCO Institute for Lifelong Learning.
Gupta, A. 2020. India. Levy, D. et al., *How Covid-19 Puts Private Higher Education at Especially High Risk – and not: Early Observations Plus Propositions for Ongoing Global Exploration*. Albany, NY, Program for Research on Private Higher Education. (PROPHE Working Paper 22).
Gustafsson-Wright, E., Boggild-Jones, I., Segell, D. and Durland, J. 2017. *Impact Bonds in Developing Countries: Early Learnings from the Field*. Washington, DC, Brookings Institution/Convergence.
Gustafsson-Wright, E., Gardiner, S. and Putcha, V. 2015. *The Potential and Limitations of Impact Bonds: Lessons from the First Five Years of Experience Worldwide*. Washington, DC, Global Economy and Development/Brookings Institution.
Hanemann, U. 2021. *Non-state Actors in Non-formal Youth and Adult Education*. (Background paper for *Global Education Monitoring Report 2021/2*.)
Härmä, J. 2020. *Low-Fee Private Schooling and Poverty in Developing Countries*. London/New York, Bloomsbury.
Hatsaandh, A. 2022. *Non-state Actors' Involvement in Education in Afghanistan*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Hemas Outreach Foundation. 2022. *Projects: Piyawara*. Colombo, Hemas Outreach Foundation. https://hemasoutreach.com/hemasoutreach_piyawara. (Accessed 10 October 2022.)
Press Trust of India. . 2021. India's Ed-tech sector sees USD 2.1 billion investment in 2020: Research report. New Delhi, *HT Tech*. https://tech.hindustantimes.com/tech/news/indias-ed-tech-sector-sees-usd-2-1-billion-investment-in-2020-research-report-71613057185306.html. (Accessed 11 February 2022.)
Ibrar, M. and Chettri, S. 2019. Fee hike at JNU bothers foreign students. Mumbai, India, *The Times of India*. https://timesofindia.indiatimes.com/city/delhi/fee-hike-at-jnu-bothers-foreign-students/articleshow/72192000.cms. (Accessed 1 December 2021.)
IFC. 2022. *IFC freeze on investment in K-12 private, fee-charging education*. Washington, DC, International Finance Corporation. www.ifc.org/wps/wcm/connect/Industry_EXT_Content/IFC_External_Corporate_Site/Education. (Accessed 26 October 2022.)
Ihsan Trust. *Ihsan Trust: Who We Are*. Karachi, Pakistan, Ihsan Trust. https://ihsantrust.org/who-we-are. (Accessed 26 January 2022.)
ILM Ideas. 2014. *Access to Finance for Low Cost Private Schools*. Lahore, Pakistan, ILM Ideas/Sebcon.
Inc42 Plus. 2020. *The Annual Indian Tech Startup Funding Report 2020*. New Delhi, Inc42 Plus.
India Ministry of Education. 2021. *UDISE+ Publications and Statistics*. New Delhi, Department of School Education and Literacy, Ministry of Education. https://udiseplus.gov.in/#/Publication. (Accessed 10 January 2021.)
India Ministry of Human Resource Development. 2018. *Government Declares 6 Educational 'Institutions of Eminence'; 3 Institutions from Public Sector and 3 from Private Sector Shortlisted*. New Delhi, Ministry of Human Resource Development. https://pib.gov.in/newsite/printrelease.aspx?relid=180478. (Accessed 7 February 2022.)
India Ministry of Minority Affairs. 2021. *Annual Report 202021*. Delhi, Ministry of Minority Affairs.
Institute of Integrated Development Studies. 2022. *The Role of Non-state Actors in Education in Nepal*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Institute of Policy Studies. 2022. *Nonstate Actors in Education: A Case Study of Sri Lanka*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
ITA. 2022. *Role of Non-state Providers of Education in Pakistan*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)

Jain, I. 2021. UP govt bars private schools from hiking fees for academic session 2021-22. Mumbai, India, *The Times of India*. https://timesofindia.indiatimes.com/education/news/up-govt-bars-private-schools-from-hiking-fee-for-academic-session-2021-22/articleshow/82800569.cms. (Accessed 10 December 2021.)
Jain, S., Lall, M. and Singh, A. 2021. Teachers' voices on the impact of covid-19 on school education: Are ed-tech companies really the panacea? *Contemporary Education Dialogue*, Vol. 18, No. 1, pp. 58–89.
Janyala, S. 2021a. Private school teachers in Andhra call for financial aid from state government. Noida, India, *The Indian Express*. https://indianexpress.com/article/india/private-school-teachers-in-andhra-call-for-financial-aid-from-state-government-7463833. (Accessed 3 September 2022.)
___. 2021b. State will take over all govt-aided private educational institutions, says Andhra minister.Noida, India, *The Indian Express. https://indianexpress.com/article/cities/hyderabad/state-take-over-govt-aided-private-educational-institutions-andhra-pradesh-minister-7528669*.(Accessed 3 September 2022.)
Jebaraj, P. 2019. Private universities also want access to CSR funding. Chennai, India, *The Hindu*. www.thehindu.com/news/national/private-universities-also-want-access-to-csr-funding/article29685882.ece. (Accessed 1 February 2022.)
Kabir, A. H. and Greenwood, J. 2017. Neoliberalism, violence and student resistance in the higher education sector in Bangladesh. *Society and Culture in South Asia*, Vol. 3, No. 1, pp. 68–91.
Khan, M. A. 2018. The status of early childhood education in Pakistan: inside stories. *Contemporary Issues in Early Childhood*, Vol. 19, No. 3, pp. 310–17.
KPMG. 2017. *Online Education in India: 2021 – A study by KPMG in India and Google*. London, KPMG Private Enterprise. https://assets.kpmg/content/dam/kpmg/in/pdf/2017/05/Online-Education-in-India-2021.pdf. (Accessed 17 August 2021.)
Kundu, P. 2018. *Education as Corporate Social Responsibility (CSR): Hype or Hope?* New Delhi, Centre for Budget and Governance Accountability.
LaRocque, N. I. and Sipahimalani-Rao, V. 2019. *Education Management Organizations Program in Sindh, Pakistan: Public–Private Partnership Profile*. Manila, Asian Development Bank. (ADB Brief 107.)
Levy, D. 2020. Key Private–Public and Private–Private variables. Levy, D. et al., *How Covid-19 Puts Private Higher Education at Especially High Risk – and not: Early Observations Plus Propositions for Ongoing Global Exploration*. Albany, NY, Program for Research on Private Higher Education. (PROPHE Working Paper 22.)
Malik, A. and Hussain, M. 2022. *Providing a Scoping Overview of the Key Ancillary Service Markets that Affect the Teaching and Learning Process: The Case of Pakistan*. (Background Study Partner paper for GEM South Asia Regional Report 2022.)
Mehendale, A. and Singh, A. 2020. *India Education Outcomes Fund: A Case Study*. Geneva, Switzerland, NORRAG. (Working Paper 12.)
Michael & Susan Dell Foundation. 2020. *Mission Investing: A Framework for Family Foundations*. West Lake Hills, Tex., Michael & Susan Dell Foundation.
Mukit, S. H. 2020. Making sense of Bangladeshi ed-tech ecosystem (part 01). *LinkedIn*, 5 August.
Mundy, K. and Menashy, F. 2014. The World Bank and private provision of schooling: a look through the lens of sociological theories of organizational hypocrisy. *Comparative Education Review*, Vol. 58, No. 3, pp. 401–27.
Nair, P. 2021. China's crackdown on ed-tech firms and its impact on India, explained. Mumbai, India, *CNBC TV18*. www.cnbctv18.com/market/chinas-crackdown-on-ed-tech-firms-and-its-impact-on-india-explained-10116071.htm. (Accessed 16 August 2021.)
Nakata, S., Rahman, T. and Rahman, M. M. 2018. *Employability of Post-secondary TVET in Bangladesh: Tracking Survey of Graduates of Polytechnics*. Dhaka, World Bank.
National Bank of Pakistan. 2021. *Brief about Student Loan Scheme*. Karachi, Pakistan, National Bank of Pakistan. www.nbp.com.pk/studentloan. (Accessed 16 January 2022.)
Nepal Center for Philanthropy and Development. 2020. *Synopsis of the Philanthropic Landscape of Nepal*. Kathmandu, Nepal Center for Philanthropy and Development,. https://ncpd.org.np/news/15/philanthropic-landscape-of-nepal. (Accessed 1 March 2022.)
News 18. 2021. 500 Chhattisgarh schools forced to shut down as students leave in large numbers due to COVID. Noida, India, *CNN-News 18*. (Accessed 10 October 2021.)
Niazi, S. 2019. Fourteen more universities named Institutes of Eminence. London, *University World News*. www.universityworldnews.com/post.php?story=20190809141155941. (Accessed 1 February 2022.)
NILE and UIL. 2016. *Synthesis Report on the State of Community: Learning Centres in Six Asian Countries – Bangladesh, Indonesia, Mongolia, Republic of Korea, Thailand and Viet Nam*. Seoul/Hamburg, Germany, National Institute

for Lifelong Education/UNESCO Institute for Lifelong Learning.
Noorajan, A. 2020. A critical reflection of teacher education policies and programs in Afghanistan. Pushpanadham, K. (ed.), *Teacher Education in the Global Era*, Springer Singapore, pp. 227–37.
OECD. 2019. *India's Private Giving: Unpacking Domestic Philanthropy and Corporate Social Responsibility*. Paris, OECD Development Centre.
___. 2020. *Creditor Reporting System (CRS).* Paris, OECD Development Centre.
Opportunity EduFinance. 2020. *The State of the Affordable Non-state School Sector*. London, Opportunity EduFinance.
Ortiz, I., Burke, S., Berrada, M. and Saenz Cortés, H. 2022. *World Protests: A Study of Key Protest Issues in the 21st Century*. Berlin, Springer Nature.
Paivandi, S. 2022. *Non-state Actors in Education in Iran: Select Issues and Contributions*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Pakistan Centre for Philanthropy. 2019. *Corporate Philanthropy in Pakistan 2018: Mapping Corporate Sector Contribution towards Government Ehsaas Program*. Islamabad, Pakistan Centre for Philanthropy.
Pakistan Express Tribune. 2017. Securing futures: TEVTA to double interest-free loans for students – Punjab government hopes to make the youth skilful and independent. Karachi, Pakistan, *The Express Tribune.* https://tribune.com.pk/story/1422504/securing-futures-tevta-double-interest-free-loans-students. (Accessed 2 November 2022.)
Panigrahi, S. 2019. *Higher Education Fee Hikes: Affordability vs. Sustainability*. New Delhi, Rajiv Gandhi Institute for Contemporary Studies.
___. 2021. *Ideology, Conflict and State Control in Higher Education: A Sociological Analysis*. New Delhi, SAGE India.
Pisani, L., Dyenka, K., Sharma, P., Chhetri, N., Dang, S., Gayleg, K. and Wangdi, C. 2017. Bhutan's national ECCD impact evaluation: local, national, and global perspectives. *Early Child Development and Care*, Vol. 187, No. 10, pp. 1511–27.
Press Trust of India. 2022. 1000 students-led startups chosen for Delhi govt's 'Business Blasters' programme. New Delhi, *Hindustan Times*. www.hindustantimes.com/education/news/1000-students-led-startups-chosen-for-delhi-govt-s-business-blasters-programme-101641713773928.html. (Accessed 14 March 2022.)
Quality Education India Development Impact Bond. 2020. *Press Release: Year 2 Results – Top Marks for India's Largest Development Impact Bond*. London, British Asian Trust. https://qualityeducationindiadib.com/year-2-results. (Accessed 19 October 2020.)
Radhakrishnan, K., Angrist, N., Bergman, P., Cullen, C., Matsheng, M., Ramakrishnan, A., Sabarwal, S. and Sharma, U. 2021. *Learning in the Time of COVID-19: Insights from Nepal*. Washington, DC, World Bank.
Rahar, S. 2021. Nearly 50% dip in private school enrollments in Haryana this year. New Delhi, *Hindustan Times*. www.hindustantimes.com/cities/others/nearly-50-dip-in-private-school-enrollments-in-haryana-this-year-101624218515413.html. (Accessed 5 December 2021.)
Rai, J. 2021. Edtech unicorn Byju's raises ₹2,200 crore in fresh round. New Delhi, *The Mint*. www.livemint.com/companies/start-ups/edtech-unicorn-byju-s-raises-2-200-crore-in-fresh-round-11633374315996.html. (Accessed 10 January 2022.)
Rajan, T. 2022. The unusual case of BYJU's: creating one of the world's most valued educational technology companies from India. *Indian Journal of Marketing*, Vol. 52, No. 4, pp. 8–23.
Rana, M. and Roy, M. 2016. Corporate Social Responsibility Practices in Bangladesh: A Study on Commercial Banks. http://dx.doi.org/10.2139/ssrn.2891359.
Rao, N., Cohrssen, C., Chan, S. and Richards, B. 2020. *An Evaluation of the Early Childhood Care and Development Programme in Bhutan*. Thimphu, UNICEF Bhutan.
Regmi, K. D. 2017. World Bank in Nepal's education: three decades of neoliberal reform. *Globalisation, Societies and Education*, Vol. 15, No. 2, pp. 188–201.
Roy, I., Sarker, A. K. and Chowdhury, S. 2017. Corporate social responsibility practices in Bangladesh: a statistical analysis on state-owned & private commercial banks. *Economics*, Vol. 5, No. 4, pp. 322–32.
Sahoo, N. 2020. *Making Sense of Delhi's Education Revolution.* New Delhi, Observer Research Foundation. www.orfonline.org/expert-speak/making-sense-delhi-education-revolution. (Accessed 14 March 2022.)
Sahoo, N. and Mahajan, B. 2020. *How did Aam Aadmi Party fix Delhi's broken government schools?* New Delhi, Observer Research Foundation. www.orfonline.org/expert-speak/how-did-aam-aadmi-party-fix-delhis-broken-government-schools-60961. (Accessed 14 March 2022.)
Sarin, A., Dongre, A., Khanghta, P., Varshney, N., Gaur, A. and Sengai, A. 2018. Implementation of Section 12(1)(c) of the Right to Education Act. *Economic and Political Weekly*, Vol. LIII, No. 8, pp. 31–38.

Save the Children. n.d. *Save the Children's Response to Covid-19 in Sri Lanka*. London, Save the Children International. https://srilanka.savethechildren.net/sites/srilanka.savethechildren.net/files/library/Sri_Lanka_COVID%2019_Strategy_Booklet_Final.pdf. (Accessed 12 March 2022.)
Schofield, J. and Roder, D. C. 2022. *Non-state Actors in Education in Bhutan*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Sharma, R. 2021. Highest since 2014 in Gujarat: 61,000 students shift from pvt to govt schools. Noida, India, *The Indian Express*. https://indianexpress.com/article/india/highest-since-2014-in-gujarat-61000-students-shift-from-pvt-to-govt-schools-7440675. (Accessed 14 March 2022.)
Shougee, M. and Shareef, A. F. 2022. *Non-state Actors in Education in Maldives: Past, Present and Future Perspectives*. (Country Study Partner paper for GEM South Asia Regional Report 2022.)
Sindwani, P. 2019. Indian students are still relying on government banks for education loans. Gurgaon, India, *Business Insider India*. www.businessinsider.in/india-education-loan-interest-rates-from-different-banks/articleshow/69924229.cms. (Accessed 26 January 2022.)
Sivasubramaniam, M. 2020. *Philanthropic and Faith-based Non-state Actors in the Low-fee Private School Sector in the Global South: Blurring the Lines of Philanthropy and Enterprise. (Background paper for Global Education Monitoring Report 2021/2.)*
Srivastava, M. 2021. India's edtech market to grow 5x to reach USD 3.5 billion by 2022: BLinC Invest. Singapore, *KrAsia*. https://kr-asia.com/indias-edtech-market-to-grow-5x-to-reach-usd-3-5-billion-by-2022-blinc-invest. (Accessed 4 May 2022.)
Srivastava, P. 2016. Philanthropic engagement in education: localised expressions of global flows in India. *Contemporary Education Dialogue,* Vol. 13, No. 1, pp. 5–32.
Street Child. 2021. *Construction, Curriculum and Instruction: Critical Life-Saving and Life-Sustaining Services Provided by Non-state Actors to Support Children in Conflict and Crisis-affected Contexts*. (Background paper for *Global Education Monitoring Report 2021/2.*)
The Economic Times. 2021. Byju's acquisitions: Byju's spends $2 billion for acquisitions over six months, adds Great Learning, Toppr to list. Mumbai, India, *The Economic Times*. https://economictimes.indiatimes.com/tech/startups/byjus-buys-great-learning-toppr-as-2-billion-acquisition-spree-continues/articleshow/84752307.cms. (Accessed 30 August 2021.)
Times of India. 2021. Tamil Nadu: Admissions up in government schools, but funds for school education cut. Mumbai, India, *The Times of India*. https://timesofindia.indiatimes.com/city/chennai/tamil-nadu-admissions-up-in-government-schools-but-funds-for-school-education-cut/articleshow/85318115.cms. (Accessed 10 October 2021.)
TISS. 2022. *The Role of Non-State Actors in the Teaching Profession and Teacher Education in South Asia.* (Background Study Partner paper for GEM South Asia Regional Report 2022.)
UIL. 2019. *Towards CONFINTEA VII: Adult Learning and Education and the 2030 Agenda*. Hamburg, Germany, UNESCO Institute for Lifelong Learning.
Ullas, S. S. 2021. Many private schools in Bengaluru face acute shortage of teachers. Mumbai, India, *The Times of India*. https://timesofindia.indiatimes.com/city/bengaluru/many-private-schools-in-bengaluru-face-acute-shortage-of-teachers/articleshow/87618605.cms. (Accessed 10 December 2021.)
UNESCO. 2019. *Global Education Monitoring Report 2019: Migration, Displacement and Education – Building Bridges, Not Walls.* Paris, UNESCO.
___. 2021. *Global Education Monitoring Report 2021/2: Non-state Actors in Education – Who Chooses? Who Loses?* Paris, UNESCO.
UNESCO and UNICEF. 2021a. *India Case Study: Situation Analysis on the Effects of and Responses to COVID-19 on the Education Sector in Asia*. Bangkok/Kathmandu, UNESCO Asia and the Pacific Regional Bureau for Education/UNICEF East Asia and Pacific Regional Office and Regional Office for South Asia.
___. 2021b. *Pakistan Case Study: Situation Analysis on the Effects of and Responses to COVID-19 on the Education Sector in Asia.* Bangkok/Kathmandu, UNESCO Asia and the Pacific Regional Bureau for Education/UNICEF East Asia and Pacific Regional Office/Regional Office for South Asia and Cambridge Education.
UNICEF. 2019. *A World Ready to Learn: Prioritizing Quality Early Childhood Education – Global Report*. New York, UNICEF.
___. 2021a. *Continuing Children's Education in Nepal during the COVID-19 Pandemic*. New York, UNICEF.
___. 2021b. *India Case Study: Situation Analysis on the Effects of and Responses to COVID-19 on the Education Sector in Asia*. New Delhi, UNICEF.
UNICEF Regional Office for South Asia, UNICEF East Asia and Pacific and UNESCO Bangkok. 2021. *Situation*

Analysis on the Effects of and Responses to COVID-19 on the Education Sector in Asia. New York/Paris, UNICEF/UNESCO.

USAID, ICNL and FHI360. 2020. *Civil Society Organization Sustainability Index 2019: Asia Region - Sri Lanka Country Report*. Washington, DC, USAID/Bureau for Democracy, Conflict and Humanitarian Assistance/Center of Excellence on Democracy, Human Rights and Governance.

Varma, P. 2018. Rejuvenating Public Education in Kerala. *People's Democracy*, Vol. XLII, No. 30. https://peoplesdemocracy.in/2018/0729_pd/rejuvenating-public-education-kerala. (Accessed 14 March 2022.)

Vellanki, V. 2014. Teach For India and education reform: some preliminary reflections. *Contemporary Education Dialogue,* Vol. 11, No. 1, pp. 137–47.

Witharana, D. 2015. The story of the "6% t-shirt": the hundred day struggle of the Federation of University Teachers' Association, Sri Lanka. *The South Asianist Journal,* Vol. 4, No. 1.

World Bank. 2019. *Bangladesh Tertiary Education Sector Review: Skills and Innovation for Growth*. Washington, DC, World Bank.

___. 2020. *Bangladesh Transforming Secondary Education for Results Operation*. Washington, DC, World Bank. (Implementation Status and Results Report Sequence 6.)

Young Lives. 2020. *Interrupted Education in India (Andhra Pradesh and Telangana): Support for Students During the COVID-19 School Closures*. Oxford, UK, Young Lives.

Zarestky, J. and Ray, S. M. 2019. Adult education programmes of NGOs operating in Non-Western contexts: a review of empirical literature. *International Journal of Lifelong Education,* Vol. 38, No. 6, pp. 657–72.

Zubairi, A., Halim, W., Kaye, T. and Wilson, S. 2021. *Country-Level Research Review: EdTech in Pakistan*. London, EdTech Hub. (Working paper.)

SOUTH ASIA

Non-state actors in education

WHO CHOOSES? WHO LOSES?

Despite the understanding that fulfilling the right to education requires multiple stakeholders and that the role of non-state actors has increased over the past 30 years, non-state involvement in education generates passionate debate, particularly over two key concepts: the extent to which education is a public or private good, a form of investment or consumption; and how to interpret the right to education with respect to its implications for state and non-state actors' responsibilities.

This regional report, which builds on the 2021/2 *Global Education Monitoring Report* on non-state actors in education, explores the theme from the perspective of South Asia, the region with the highest global share of enrolment in private institutions. Partly as a result of its social, political and economic challenges, non-state actors are significantly involved in every aspect of education systems in the region, while also shaping and influencing policies.

The report covers Afghanistan, Bangladesh, Bhutan, India, the Islamic Republic of Iran, Maldives, Nepal, Pakistan and Sri Lanka. It draws extensively on data collection and expert analysis from collaborations with several institutional and individual partners in the region.

Five policy-oriented recommendations are included calling on policymakers to see the education system as one and, accordingly, to revisit and question relationships between state and non-state actors, deepening existing debates with an emphasis on equity and inclusion objectives. The recommendations relate to the role of non-state actors in education and are framed and contextualized to South Asia to help #RightTheRules so that governments protect equity through financing, quality, governance, innovation and policymaking.

unesco
Global Education Monitoring Report

4 QUALITY EDUCATION

Sustainable Development Goals

9 789231 005565

www.unesco.org/publishing • bit.ly/2022southasia