KPMG

Impact of National Education Policy 2020 and opportunities for stakeholders

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Introduction

The National Education Policy (NEP) 2020 aims to transform education, keeping the learner at the centre. The NEP builds on recommendations from the Education Commission (1964–66) and Justice J. S. Verma Commission (2012) as well as the previous version of the policy – National Policy on Education 1986, modified in 1992 (NPE 1986/92), Right of Children to Free and Compulsory Education Act, 2009 and Rights of Persons with Disabilities (RPWD) Act, 2016. The NEP 2020 is a huge stride in the right direction — it focusses on the holistic development of students by ensuring access, relevance, equity, quality and strong foundational learning.

The new policy has numerous takeaways for education sector stakeholders. This report, which is KPMG in India's point of view, analyses the impact of the NEP and puts forth various opportunity areas emerging from the new policy. Significantly, the policy lays emphasis on four key areas of reforms viz. curricular changes to build strong foundational skills, improving quality of learning across all levels of education, shift in the ways of assessment and, finally, need for systemic transformation.

The NEP envisages creating synergies in the curriculum across Early Childhood Care and Education (ECCE) to school and the higher education segments. The NEP stresses on creating a national curricular and pedagogical framework, which is competency-based, inclusive, innovative and focuses on comprehensive development of children. School curriculum is expected to imbibe the human value system and provide greater flexibility and expose students to acquire future skills in the areas of computation,

coding, design thinking, digital literacy, ethical and moral reasoning etc. The NEP promotes building of strong foundational skills right from early childhood. Also, there is a new way of envisioning vocational education in the policy by integrating it across secondary and higher education and developing a credit framework to offer vertical and horizontal mobility between vocational and higher education.

One of the stronger themes across the entire policy document is around quality improvement in the learning outcomes. A series of initiatives has been highlighted in the NEP around quality learning environments, use of ICT tools for training, experiential learning, improving the quality of faculty among others. Recommendations on moving ECCE and school pedagogy to the 5+3+3+4 structure and a three-tiered institutional architecture in the higher education segment (research focus, teaching focus and autonomous degree-granting colleges with strong employability focus) are welcome steps from the sector standpoint. Educational institutions must plan to leverage suggestions in the policy. It has rightly translated the learners' needs by offering them increased flexibility in choosing subjects mapped to their aspirations. Furthermore, multiple entry and exit points along with the concept of academic credit bank will ensure their continued learning.

The next focus area is around assessment reforms, a much-awaited change. The NEP emphasises upon the need for formative assessments, making the examinations less strenuous and thereby inducing a practice of self or peer review among the learners. Steps such as creation of a National Assessment

Centre for school-level evaluations, allowing students to retake exams in a school year, continuous assessment at higher education institutions with a shift to criteria-based grading system, reflects the progressive nature of the new policy.

The transformational dimensions highlighted in the policy are well supported by the systemic changes that unfold for the ECCE, school and the higher education segments coupled with critical digital elements. The NEP has certainly created a need for perspective planning at the central as well as the State level to be able to achieve the policy goals. Themes such as scale, autonomy, accreditation reiterate the requirement of efficient usage of academic as well as non-academic resources, i.e. faculty, infrastructural capacity (such as school complex), digital mode of delivery, greater funding etc. to be tuned for purpose. The vision is to institutionalise national-level accreditation and standard-setting bodies, which will drive quality and will focus on enhancing learning outcomes in their core and, at the same time, instil the optimal amount of flexibility and autonomy in the overall administrative framework.

The NEP 2020 is expected to put India on the track to attain goal four of the 2030 agenda for sustainable development by ensuring inclusive and equitable quality education and promoting lifelong learning opportunities for all in the next decade. In the subsequent sections, this report highlights the transformational changes as laid out for the ECCE, higher and the vocational education segments followed by stakeholder-wise action takeaways.

1. Early Childhood Care and Education and School Education

NEP has signalled a new vision for school education, providing a much-needed revision and reform agenda to the system. It has set the vision for a fundamental change in how education is delivered, opening up new opportunities for education sector stakeholders while ensuring that every school-aged child in India has access to and is provided with an equitable and high-quality education.

Key highlights of NEP 2020: School Education

1. ECCE to be integrated with school education. Structure of curriculum and pedagogy to be changed to 5 (foundational) + 3 (preparatory) + 3 (middle) + 4 (secondary). National Curriculum Framework for School Education by 2021.

2. National Professional Standards for Teachers to be developed by 2022. Also, National Assessment Center (PARAKH) to be set up as a stand-alone, standard setting body by 2022.

3. National Mission for Foundational Literacy and Numeracy. Universal foundational literacy and numeracy through National Mission by 2025.

4. Holistic curriculum to focus on 21st century skills, mathematical and scientific temper. States to rationalize schools through innovative approaches by 2025.

5. Rationalisation of schools and development of school complexes by 2025.

6. Professional standards for teachers to be created; all teachers to have 4-year B.Ed degree. Minimum qualifications for teachers to be integrated 4-year B.Ed by 2030.

7. Focus on equity for students from socio-economically disadvantaged groups . Universal access to high-quality early childhood care and education by 2030.

8. 360° holistic progress card; Board exams to be low-stakes

9. Focus on formative competency based learning and assessments.

10. Transparent online self disclosure for public oversight and accountability.

11. No separation between arts and sciences, curricular and extra-curricular and vocational and academic streams.

12. Medium of instruction up to Grade 5 in mother tongue / regional language.

1.1 Key impact areas

I. Ensure that every child has access to the formal schooling system

- **Every child in school by 2030:** once implemented, the NEP states that every child from ages 3 to 18 will have access to education, through either public or private schooling options. Over 3.22 crore out-of-school children will be brought into the formal education system by providing options for entry and exit into the schooling system

- **Fewer students from socio-economically disadvantaged groups will drop out:** a disproportionate number of students from disadvantaged backgrounds drop out without completing schools. The increased number of options for students from Socially and Economically Disadvantaged Groups (SEDGs) including set up of Special Education Zones, Gender Inclusion Fund, increased access to Open and Distance Learning (ODL) options will ensure reduction in dropouts

Nearly **30**[1] per cent of students in India drop out after grade 10

II. More holistic, competency driven learning

- **Changing the way students learn:** NEP's biggest impact will be on how students learn. The policy places a focus on ensuring students 'learn to learn' and advocates moving away from the rote-learning based system currently in place to a more activity-based, experiential learning methodology, with an increased emphasis on choice for students in the secondary grades. This will allow the education system to shift to a more personalised, student-centric model and adopt new curriculum and technology solutions that will enhance this process

- **Developing skills for future jobs:** NEP has recommended a change in curriculum and pedagogy to ensure students are developing higher order cognitive skills, 21st century skills, mathematical and computational thinking, critical thinking skills amongst others. The development of these skills will result in a future ready workforce, with an increased ability to meet the changing needs required for future jobs

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1. School Report Cards, NUEPA, 2017-18

III. Assessments as a means, not the end

- **Assessments inform teaching-learning in schools:** one of the most critical aspects of the NEP is to move away from annual examinations to a system of formative assessments to support the teaching-learning process

- **Students demonstrate competency in multiple ways:** a low-stakes board exam in Grade 10 and multiple assessments through the year, focussed on demonstrating learning will reduce the fear of examinations and allow students to demonstrate what they have learnt to the best of their abilities

IV. Professionally qualified and skilled teaching force

- **All teachers to be trained and professionally developed in ten years:** one of the key impact areas of the NEP is that all teachers will be professionally trained or certified by 2030. If implemented, all teachers from anganwadi levels up to secondary school will have the necessary professional qualifications and will meet a common set of professional standards, which is a significant change from the current system

- **Motivated and incentivised teachers:** the NEP sets up a system through which teachers can achieve tenure and be promoted through the system, which should incentivise and motivate teaching staff. Additionally, by allowing teachers autonomy over teaching methodology, ability to collaborate with others through school complexes, the new policy could remove isolation and lack of choice for teachers, thereby increasing their effectiveness
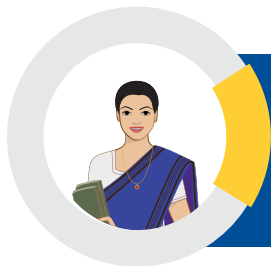
13[2] per cent of secondary school teachers in India are not professionally qualified

V. Resource efficient, open and accountable education system

- **Collaborative, resource-efficient school complexes:** rationalising of schools into clusters or complexes will increase the overall utilisation of school infrastructure, will improve collaboration between schools and will devolve autonomy for schools

- **Public and private schools held to the same standard:** NEP introduces multiple ways through which uniformity will be induced across schools. A common standard for public and private schools will be critical to ensure that both types of schools are providing the best education for students

100,000[3]

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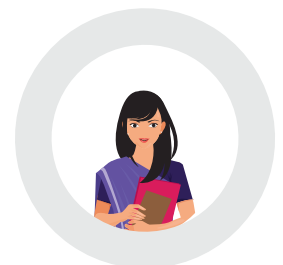
2. U-Dise, 2016-17
3. School Report Cards, NUEPA, 2017-18

1.2 Opportunities and key considerations for stakeholders

State governments

- **Implementation plans contextualised to native needs:** Preparation of state-level implementation plans based on as-is evaluation of learning levels, teacher capacity, infrastructure, funding available in the state

- Development of state curriculum, assessment framework, state school standards authority, school quality accreditation and assessment framework with clear implementation plan, timelines, capacity building requirements

- Rationalisation of school infrastructure to develop school clusters or complexes that will drive efficiency and increase collaboration; teachers to be rationalised across schools, vacancies filled through merit-based recruitment system; clear accountability system to be established through defined roles and responsibilities for education officials, school leaders; accountability system within school complexes to be laid out

- Teacher needs analysis to be conducted in the state; teacher training plan and calendar to be rolled out aligned to National Curriculum Framework for Teacher Education and Teacher Professional Standards; digital and other methods used to disseminate required teacher training; all anganwadi workers to be certified

- State level structural reforms to ensure linkages across 4 functions of policy-making, education delivery, professional and quality standards, and academic work

- Building state level child tracking systems, efficient EMIS system with real-time data analytics; identification of SEDGs within the state and development of alternate methods of schooling to meet the needs of SEDGs (including open and distance learning options, home schooling options, identification of Special Education Zones)

School managements

- Schools will have the autonomy and flexibility to adopt student-friendly curriculum and pedagogical methods

- A more activity-based and experiential-learning pedagogy will require upgradation of both physical and digital infrastructure to provide learners the space and resources required

- The NEP allows philanthropic contributions to the education sector. It also recommends the use of volunteer and civil society contribution towards development of foundational skills in students. It is required to tap into philanthropic contributions and civil society to increase the overall effectiveness of schools

- The implementation of multi-language teaching up to Grade 5 will require significant change in school's resources. Textbooks, learning materials will need to be available in local languages; teacher capacity will need to be built for local language and bilingual instruction; assessments will need to be conducted in local languages

- The revised curricular and pedagogical structure provides schools an opportunity to expand their current capabilities. The integration of pre-primary to secondary within a single school can allow for better utilisation of resources and efficiencies within the school system

Teachers

- The introduction of professional standards for teachers will clearly outlined roles and responsibilities of teachers, competencies required for teachers and necessary pre-service training allowing aspiring and current teachers to monitor their own capability and development
- Reduction in time spent on non-academic tasks, and increase in time spent on core academic and teaching responsibilities

- Vertical mobility for teachers: currently, teacher recruitment, promotion and tenure is non-transparent or based on seniority. The introduction of the NEP will provide teachers with a clear process through which recruitment, tenure and promotions take place within the state, incentivising teachers to perform better and increasing teacher motivation

Students

- Increased focus on skill and competency development, and building of higher order cognitive, social emotional skills and 21st century skills, which will build skills required for future work
- Greater choice in subjects and ability to focus on both academic and non-academic pursuits

- More opportunities to enter schooling system through various options for pre-primary education, open and distance learning; access to counselling and other services to support learning and progress through schools
- Ability to demonstrate learning and competency through multiple opportunities in an ongoing manner

Higher Educational Institutes

- Teacher education is to be integrated into multi-disciplinary colleges and universities

- HEIs to offer 4-year B.Ed., 2-year B.Ed. and shorter certification courses for specialised areas of teaching

2. Higher Education

The NEP 2020 has outlined an ambitious task of nearly doubling the GER in higher education from 26.3 per cent (2018) to 50 per cent by 2035 while improving quality of Higher Education Institutions (HEI) and positioning India as a global education hub. The focus is on providing a flexible curriculum through an interdisciplinary approach, creating multiple exit points in what would be a four-year undergraduate programme, catalysing research, improving faculty support and encouraging internationalisation.

One of the paradigmatic shifts will be the setting up of the Higher Education Commission of India (HECI) for the entire higher education segment. The HECI will act as a single regulator and several functions, including accreditation, funding and academic standard setting, will be carried out by independent verticals. These entities will eventually replace other regulatory bodies like the University Grants Commission (UGC) or the All India Council for Technical Education (AICTE).

Key highlights of NEP 2020: Higher Education

01	Integration of vocational education within higher education. At least 50 per cent learners to have exposure to vocational education by 2025.	**08**	Reputed international universities to be encouraged to set up Indian campuses
02	Enhanced equity and inclusion - Establishing high-quality HEIs in aspirational districts and Special Education Zones. At least one large multidisciplinary HEI in or near every district by 2030	**09**	Career progression pathways for faculty based on teaching, research, and service for faculty and institutional leadership
03	Move towards multidisciplinary and integrated teacher education programmes and a Four-year B.Ed. programme. Four-year integrated B.Ed. to become the minimum qualification by 2030.	**10**	Flexible curricular structure that will offer multiple entry and exit points to create new possibilities for lifelong learning
04	Greater institutional autonomy through independent Board of Governor (BoG); affiliating college system to be phased out. All standalone professional educational institutions to become multidisciplinary by 2030.	**11**	Greater focus on online education and Open Distance Learning (ODL) as a key means to improve access, equity, inclusion
05	Conversion of existing stand-alone professional institutions to multidisciplinary HEIs by 2030. All HEIs to be multidisciplinary with student strength > 3000	**12**	National Research Foundation to coordinate research funding and direct it to outstanding peer-reviewed research
06	Three-tiered institutional architecture. Tier i – Research Universities, Tier ii – Teaching Universities, Tier iii – Autonomous colleges. All colleges to be accredited and become autonomous degree granting colleges by 2035	**13**	Single regulator (HECI) for all of higher education, separation of functional roles - National Higher Education Regulatory Authority (NHERA), National Accreditation Agency (NAA), General Education Council (GEC), Higher Education Grants Council (HEGC)
07	Focus on increasing scale of HEIs and promoting multidisciplinary education	**14**	Greater disclosure of information for public oversight and accountability

2.1 Key impact areas

I. Quality universities and colleges through large-scale consolidation

- **Institutional restructuring and consolidation:** this move will have a significant impact on the volume of HEIs in the country, by reducing them to nearly one-third. This will create a less fragmented higher education system in the country. However, it is worth noting that the average enrolment per college in India currently stands at 693[1], while the policy aims to create large HEIs with 3000 plus enrolments. Furthermore, despite the long-held view that autonomy helps promote excellence, India only has 747[1] autonomous colleges, out of its nearly 39,000 colleges[2]

- **Focus on multidisciplinary education:** the Indian higher education system is characterised by single disciplinary islands of excellence such as the IITs, IIMs and AIIMS. This move will result in the system heading towards creation of large multidisciplinary universities called Multidisciplinary Education and Research Universities (MERUs), like those in the U.S. and the U.K., with increased focus on the large number of specialised colleges to adopt multidisciplinary education. The creation of MERUs, especially in aspirational districts, will provide access to quality education in diverse fields across all segments of society

Move could result in no. of HEIs coming down to **15,000**[3] from **~50,000**[3]

96[1] per cent of HEIs in India currently have enrolments <3000

Case in point[2]**:** The three-tier system established by the landmark 1960 California Master Plan for higher education that resulted in university system being segregated into research, teaching and community colleges in a move to strive for excellence, increase access to students and drive down cost per student graduating.

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1. AISHE 2018-19 and UDISE, Ministry of Human Resource Development, KPMG in India analysis
2. A Master Plan for the Higher Education in California 1960-1975, California State Department of Education, 1960
3. Draft National Education Policy, 2019

II. A higher education system that is accessible and inclusive

- **Enhanced equity and inclusion:** currently, SEDGs have poor GER[1] (SCs: 22 per cent, STs: 15.9 per cent) and of all enrolled students, less than 10 per cent have access to financial support. The establishment of Special Education Zones in areas of high SEDG population and a greater role of private HEIs in ensuring equity through scholarships and remedial intervention is likely to enhance GER and graduation outcomes among this segment

- **Improving access and equity through Open Distance Learning and online programmes:** around 40 lakh learners or 11[1] per cent of the total higher education enrolments in India are through ODL. This is likely to see a significant increase in the coming few years to help double India's GER.

45[1]
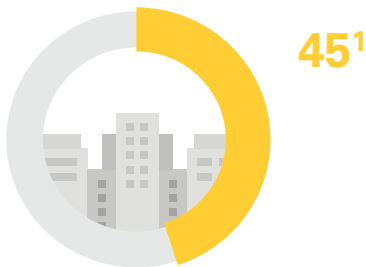
1.5 crore[1] additional learners expected to be catered through ODL and online learning systems

III. Quality and well-incentivised faculty at the core of higher education transformation

- **Addressing faculty shortage and quality:** to optimise teaching loads of faculty, with the current faculty-student ratio (FSR) of 1:29 and taking 1:20 as a healthy ratio, a minimum of five lakh faculty members would need to be hired into the system even at current GER levels. In addition to addressing faculty shortage, the quality of the faculty also needs to be addressed. The quality-related improvements suggested to the talent management

system are also likely to impact faculty motivation levels and, in turn, graduation outcomes of students

- Catalysing research: the National Research Foundation (NRF) proposed by the NEP is likely to create a dedicated focus towards quality research, including widening the research funding by making it competitive, improving efficiency of funding processes and having a more targeted approach to more funding research initiatives

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1. AISHE 2018-19 and UDISE, Ministry of Human Resource Development, KPMG in India analysis

IV. Promoting excellence through internationalisation

- **Internationalisation:** crucial for any knowledge economy to thrive is a two-way exchange of thought across borders. Internationalisation reforms proposed by the NEP would lead to a greater attraction of international academia to participate in the Indian education system. Also, this will result in India's heightened presence in the global higher education map by allowing both Indian HEIs to expand their footprint abroad as well as reputed foreign players to set up institutions in India. Collaboration with foreign universities by Indian HEIs will aid in integration of global skills in Indian curricula, thereby creating an international education ecosystem in India for Indian students and faculty. The framing of a new, liberal legislative framework will form the basis of twinning/ articulation agreements between foreign and Indian universities and will be crucial to attract foreign investments in Indian education

V. Accountability and transparency as levers for improved governance

- **Improved governance, efficiency and accountability:** Measures such as creation of a single regulatory body and a suggestion to have a Board of Governors consisting of highly qualified and competent individuals is likely to improve governance and systemic efficiency. Existing HEIs are likely to have a lesser administrative burden in dealing with multiple regulators. A greater move towards transparency through public disclosure of academic and financial information will lead to increased deployment of data tracking, auditing and information systems, both at the state and the institutional level, improving the overall accountability

2.2 Opportunities and key considerations for stakeholders

State governments

- Better outcome monitoring and resource sharing as the policy will lead to consolidation of the highly fragmented higher education system into clusters

- Improved budgetary efficiency, which can be directed towards enhancing educational outcomes

HEIs

- Ease of starting and operating HEIs because of clear demarcation of roles and responsibilities among various higher education bodies across regulation, accreditation, funding and academic standard setting

- Increased academic and administrative autonomy of all HEIs to result in quality enhancement, thereby causing both monetary and non-monetary benefits (improved reputation, quality of student enrolment, faculty motivation levels and so on)

- Opportunities for expansion and increasing enrolments in terms of ODL and online programmes and branch campuses in other countries

- Enhanced opportunities for private HEIs to obtain research funding owing to emphasis on merit-based and peer-reviewed funding processes

Faculty

- Better service environment for faculty in terms of access to infrastructure across basic requirements as well as educational technology required in classrooms

- Career advancement opportunities for faculty through operationalisation of career-progression mechanisms, professional development opportunities and improved incentivisation structures. Also, inclusion of teaching courses and stints in Ph.D. programmes will better prepare future faculty for a career in the academia

- Minimal career gap and continuous learning opportunity for trainers through use of technology platforms such as SWAYAM and DIKSHA, system-wide mentoring missions with senior faculty to ensure continuous training opportunities while pursuing their careers

- Rationalisation of teaching duties and greater autonomy to faculty to design curricular and pedagogical approaches will lead to improved teaching outcomes. Also, reduced focus on non-academic work will allow faculty to give more time for student support and research activities

Students

- More opportunities to enter the higher education system through enhanced scholarships, quality ODL and online degree programs that permit remote studies
- Greater flexibility for students for course choices and pace of study
- Digitally stored credits to enable easy transfer, self-paced study and verification by third parties (such as employers) in the future
- Hands-on learning and practical exposure through short-term skill certificates, internships, research-based curriculum etc.
- Improved transparency by HEIs would lead to informed decision-making
- Reduced pressure on students through introduction of one common entrance exam with the option to choose subjects for UG admission.
- Global exposure for Indian students through exchange programmes and setting up of foreign university branch campuses in India

Industry and other service providers

- **Collaboration opportunity for industry players in blockchain, AI, predictive analytics:** Emphasis laid on monitoring and evaluation calls for building strong data layers and technology solutions, etc. – potential for technology players in these domains
- System-wide ICT transformation leads to potential for private sector participation in technology provision, infrastructure set-ups, capability development for both academic and administrative aspects
- Opportunity for Financial services players and financial technology players to collaborate with the National Scholarship Portal to support, foster and track the progress of students receiving scholarships. Private HEIs can also tie up with fintech players to offer larger numbers of freeships and scholarships to their students
- Opportunity for industry participation in research, co-delivering short-term skill certificates, partnering in creation of online universities
- Opportunity for the private sector to be involved as experts in setting up and operationalising of the National Educational Technology Forum (NETF)

3. Vocationalisation in schools and development of higher education pathways

NEP 2020 lays down strong emphasis on holistic education across schools and higher education institutions and acknowledges the need for vocational training for students. The policy reiterates India's very low formally skilled workforce (less than five per cent) as compared to other developed economies.

The policy has identified some of the underlying reasons for low vocational education numbers, including lack of focus on dropout candidates, absence of defined pathways between higher and vocational education and the perception of vocational education being inferior to mainstream education.

- Setting up Governance structure and assigning responsibilities specially at district level where schools interact with vocation training institutions and industry

- Readiness assessment in terms of infra-gap, supply of adequate vocational trainers, sectoral gap and industry-job mapping

- Setting entry qualification for teachers/ trainers in vocational stream across schools and HEIs

- Capacity building in terms of training of trainers/ teacher, including RPL like module for transforming existing trained vocational manpower into effective teachers/ trainers

- Development of proper framework in sync with NSQF that heal seamless integration of vocational stream across schools and HEIs

- Successful implementation of credit-based framework allowing full mobility and multiple entry-exit points

- At least 50 per cent of learners through the school and higher education system shall have exposure to vocational education

Achieving Sustainable Development Goal (SDG 4.4)

- By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship

3.1 Key impact areas

I. Improved integration of vocational education

- The NEP states that every child will learn at least one vocational skill in middle and secondary school. Thus, vocational education will now be integrated across the value chain. Additionally, the number of students in vocational education will also be considered while arriving at the GER targets. The aim will be to expose 50 per cent of the learners in school and higher education to vocational skills by 2025

II. Creation of hybrid vocational ecosystem

- A credit-based framework in sync with the National Skills Qualifications Framework (NSQF) is envisaged to allow easy mobility between vocational and higher education and create vertical and horizontal mobility for students undergoing vocational training. Also, the policy envisages collaboration between secondary schools, ITIs, polytechnics and local industries to promote creation of skill labs under a hub-and-spoke model for sharing of training resources.

- A modular credit-linked skilling framework will further promote lifelong learning amongst the active workforce as well as provide an impetus to scale the apprenticeship ecosystem by enabling engagement of apprentices as per The Apprentices Act, 1961 and the Apprenticeship (Amendment) Rules, 2019

III. Integration of vocational education with Higher Education

- While degree programs such as Bachelor of Vocation (B. Voc.) will continue, HEIs can develop and conduct their own vocational courses in partnership with industry and NGOs. HEIs would also be allowed to offer short-term vocational skill certificate courses. With improved linkages between formal education and vocation education, the B.Voc. programme is likely to gain popularity, especially the ones that are employment oriented and co-developed with industry leaders

IV. Increased market orientation of vocational education

- The NEP intends to focus on developing industry linkages and demand-driven vocational courses by engaging industry at various levels, including co-developed courses and development of incubation centres at HEIs. Besides this, the policy also envisages alignment with international standards. The focus areas for vocational education are intended to be chosen based on skill gap analysis and mapping of local opportunities. The increased impetus for vocational education and lifelong learning in the policy is likely to provide comfort to employers as far as continuous supply of skilled manpower is concerned and will improve the overall supply-side recognition of the vocational system

3.2 Opportunities and key considerations for stakeholders

Students

- **Multiple entry-exit facilities for students:** students seeking a career in vocational education and related jobs will get a better preview of the same during their secondary school and will have option to obtain higher education degrees later with the introduction of the credit transfer framework

- **Promotion of inclusivity and diversity:** the Government of India aims to establish a "Gender-Inclusion Fund" to build the nation's capacity to provide inclusive quality education to all girls, including vocational education. This is expected to reduce the disparity in access to education (including vocational education) for children and across socio-economically disadvantaged groups

Teachers

- **Increased demand for trained vocational instructors and master trainers:** the NEP mandates an adequate number of teachers in schools across subjects - particularly in subjects such as vocational education. Schools will also be encouraged to hire local eminent personalities or experts as master instructors in vocational subjects. This is expected to result in increased demand of master trainers.

- **Increased supply of quality trained instructors:** the National Curriculum Framework for Teacher Education (NCFTE) will be included in teacher education curricula for vocational education. This is expected to increase the quality and number of trained trainers

Education Technology (Edtech) players

- **Opportunity for Edtech players to collaborate with schools on imparting skilling courses:** With a certain degree of autonomy, the liberty to run short-term certificate courses and the mandate of multidisciplinary and new-age courses complemented by ODL and online delivery channels, HEIs have a great opportunity to create new streams of revenue

- **Opportunity for Edtech players to collaborate with HEIs offering vocational programs to offer joint degree/certificate programmes:** NEP lays emphasis on technology-based learning, delivery and capacity-building solutions. Hence, EdTech players will have the opportunity to develop content, delivery platforms and learning management systems for HEIs and vocational institutes seeking to invest in digital learning. Additionally, they may also collaborate with HEIs to offer degree programs as well as certificate programs in HE or vocational education

- **Opportunity for players operating in assisted technology space:** Assistive devices, technology-based supportive tools and language-appropriate teaching-learning materials (e.g., textbooks in accessible formats such as large print and Braille) will be made available to assist specially abled students to integrate more easily into classrooms. Implementation of this technology will help promote inclusivity and is also expected to provide opportunity to players in the assisted technology space.

ITIs, Polytechnics and Industries

- **Opportunity to develop tailored programs with HEIs:** While industries will have the opportunity to work with HEIs for creating tailored programs that serve their needs, they will also have a role in shaping the larger skills ecosystem to be more aligned with their needs.

- As the system evolves to become credit based, continuous learning focussed and open to online delivery channels, HEIs and skill providers would have the opportunity work together for developing meaningful, employment-oriented offerings at affordable prices through resource optimisation strategies.

- **Opportunity for ITIs/polytechnics to collaborate with schools:** ITIs and Polytechnics will have better mobilisation opportunities while working with secondary schools and this will help address awareness and perception-related issues

4. Embracing the digital shift

The NEP weaves the digital thread across the very fabric of the education system giving 'digital' the attention it needs. Technology adoption resonates across all facets of education in the new policy be it for online learning, e-program delivery, teacher training or e-assessments. At the same time, there is conscious effort not to overdo the digital agenda and the policy does talk about the challenges of managing screen-time and the effects of the digital medium on the social and psycho-motor dimensions of learning.

With school education being organised in the new pedagogical and curricular structure of foundational, preparational, middle and secondary phases, there will be a need to rethink and recalibrate the e-content development strategy. While the formative years may focus on storytelling, animation and gamification, 3-D visualisation and AR-VR, interactive case studies may be introduced in advanced phases to inculcate multidisciplinary experiential learning. A more modular approach for e-content development will further reduce the efforts required for periodic upgrading. The NEP seeks to transform learners into 'truly global citizens', new content needs to be developed keeping in mind the larger learning goals around environmental awareness, resource conservation and other global concerns. The policy appropriately lists down some of the critical challenges that lie ahead in implementation, including affordability and access to the internet and devices, teacher readiness for using blended learning tools and the massive task of continuous and effective online examinations. Some of the key considerations in this regard, include the following.

I. Technology for improving learning outcomes with focus on disadvantaged sections

- One of the primary areas the new policy seems to address is leveraging technology for improving learning outcomes and providing access to quality education at scale. The policy focusses on providing quality education to disadvantaged sections as well as improving digital access and technology assisted learning access for Divyang students

II. Improving access and equity through online courses and ODL

- The NEP aims at providing for and improving access to quality education through the online learning medium. On the higher education side, it opens new opportunities for developing custom courses that may be offered in online or distance-learning mode

III. Enhanced digital infrastructure

- The NEP focuses on developing and enhancing an existing national-level repository of digital learning resources as well as e-learning public platforms like DIKSHA and SWAYAM. It talks about development of better online assessment or examination platforms leading to a host of new areas such as development of digital question banks. Innovative 'Virtual Labs' will be utilised to improve access to digital learning for socially and economically disadvantaged groups

## IV. NETF and adoption of disruptive technologies

- A new autonomous body, NETF, will be created for overseeing and facilitating decision-making in the technology-based learning space. It will provide a strategic thrust as well as set standards for e-learning in times to come

V. Data-driven systems for evidence-based policymaking

- Performance Assessment Review and Analysis of Knowledge for Holistic Development (PARAKH) is expected to monitor the achievement of learning outcomes and guide the boards of education to make learning more contemporary and suited to future needs. Thus, this will provide opportunities for setting up National/ State level data centres for collation of learning data and analyse them for effective policy design and implementation.

5. Way forward and Opportunities for stakeholders
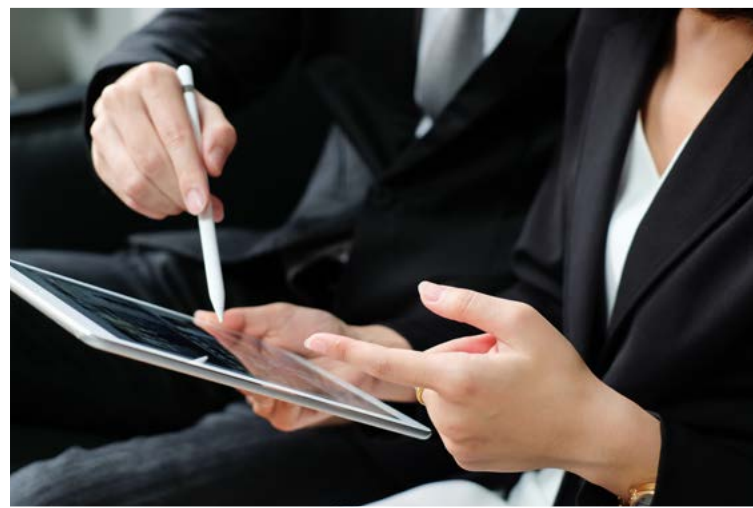
The National Education Policy 2020 is a progressive policy and aims to address many growing developmental imperatives of our country. The NEP is expected to put India on track to attain Goal #4 of the 2030 agenda for sustainable development by ensuring inclusive and equitable quality education and promoting lifelong learning opportunities for all in the next decade. It is imperative to prioritise the initiatives and implement the NEP in a gradual manner. The policy proposes the revision and revamping of all aspects of education structures, including regulation and governance. It is only possible when the efforts are collaborative in nature, both at the Central and the State level, with significant involvement of private sector stakeholders in close consultation with educational institutes, trainers, technology partners and industry. Additionally, there is a need to support these initiatives with enough budgets at all levels. Some of the immediate focus areas and potential opportunities for stakeholders are captured below.

S. no.	Stakeholder(s)	Focus areas	Key action points	Timelines
01	Central Government	Governance	• Constitute Steering Committee under PMO along with program management unit for regular consultation with States and other bodies • Establish the newly proposed bodies such as HECI, NHERC, GEC and HEGC along with appointment of members for key roles • Create a hybrid governance model to steer interactions between skills and HE ecosystems • Establish vocational education as an alternate career pathway under National Higher Education Qualification Framework (NHEQF)	Immediate

S. no.	Stakeholder(s)	Focus areas	Key action points	Timelines
02	State Government bodies in collaboration with District and local bodies, including Panchayats	Operational standards and Convergence	• Define rules and regulations for private schools and private school operators • Establish convergence with RTE and existing schemes such as Samagra Shiksha • Draw a state-contextualised prioritisation matrix of initiatives to ensure that the most critical actions are undertaken first • Develop a rationalisation framework tailored to local needs for institutional restructuring and consolidation with clear 5, 10 and 15-year targets	Immediate
03	National Council for Teacher Education, DGT, NSDC	Capacity building	• Short-term training programs for state officials (DEOs, BEOs, BRCs/CRCs) to be designed • State level mentorship scheme and identification of mentor institutions to strengthen affiliated colleges to enable them to obtain autonomy • State faculty development mission – nodal centre in universities, custom FDPs, online platforms to train master faculty members	Ongoing
04	Industry partners	Teaching, research and funding	• Develop fund pool for contribution towards research and development of foundational skills • Collaboration opportunity for industry players in blockchain, AI, predictive analytics with focus on monitoring and evaluation • Opportunity for industry participation in research, co-delivering short-term skill certificates, co-partnering in creation of online universities	Ongoing
05	Schools	Curriculum and Pedagogy	• Opportunity to adopt student-friendly curriculum and pedagogical methods • Opportunity to leverage activity-based and experiential-learning pedagogy will require upgrade of both physical and digital infrastructure to provide learners the space and resources required	Ongoing

S. no.	Stakeholder(s)	Focus areas	Key action points	Timelines
06	Higher Education Institutes	Autonomy and Expansion Providers	• Integrate Teacher education offerings into multidisciplinary colleges and universities, and offer 4-year B.Ed., 2-year B.Ed. and shorter certification courses for specialised areas of teaching • Ease of starting and operating HEIs because of clear demarcation of roles and responsibilities across regulation, accreditation, funding and academic standard setting • Leverage increased academic and administrative autonomy for quality enhancement, thereby causing both monetary and non-monetary benefits • Opportunities for expansion and increasing enrolments in terms of ODL and online programmes and branch campuses in other countries • Enhanced opportunities for private HEIs to obtain research funding owing to emphasis on merit-based and peer-reviewed funding processes, improved regulatory landscape	Immediate
07	School and HEI Management	Entity Change, Acquisition and Consolidation	• Since all educational institutions will have to work as 'not-for-profit' entities, all pre-schools will have switch to a Not for Profit constitution • Opportunity for HEIs to merge/acquire other HEIs since mandate of the NEP requiring HEIs to be multidisciplinary will result in substantial consolidation	Ongoing
08	Foreign Universities	Opportunity to establish campus in India and collaborate with Nidan HEIs	• Opportunity for top 100 Foreign Universities to set up campuses in India. A legislative framework facilitating such entry will be put in place and such Universities will be given autonomy on par with other autonomous institutions of India. • Opportunity to increase collaboration with Indian Educational Institutions to widen the international exposure for both teachers/ students and Improve the quality of education and learning	Ongoing

S. no.	Stakeholder(s)	Focus areas	Key action points	Timelines
09	Vocational training providers / ITIs	Collaboration and new course offerings	• Opportunity to develop tailored programs with HEIs and have a role in shaping the higher education ecosystem and aligning it with market needs • Develop credit-based, continuous learning focussed courses in collaboration with HEIs for developing meaningful, employment-oriented offerings at affordable prices through resource optimisation strategies.	Immediate
10	Content and book providers	Local Language Offerings	• Develop textbooks, learning materials and provide to students in local languages • Develop teaching and learning material to develop teacher capacity suitable for local languages and bilingual instruction; • Develop assessment materials and question banks for schools, which need to be conducted in local languages	Immediate
11	Education Technology Players	Joint course offerings	• Opportunity to collaborate with schools for skilling courses starting from class six • Opportunity for Edtech players to collaborate with HEIs offering vocational programs to offer joint degree/certificate programmes.	Ongoing
12	Financial Services players	Inclusivity	• Opportunity for Financial services players and financial technology players to collaborate with the National Scholarship Portal to support, foster and track the progress of students receiving scholarships. • Private HEIs can also tie up with fintech players to offer financial support and scholarships to their students	Ongoing

S. no.	Stakeholder(s)	Focus areas	Key action points	Timelines
13	Assisted Technology providers	Inclusivity and accessibility	• Assistive devices, technology-based supportive tools and language-appropriate teaching and learning materials (e.g. textbooks in accessible formats such as large print and Braille) will be made available to assist specially abled students.	Ongoing
14	Information and Communication Technology (ICT) Infrastructure Providers	Transformation and Scalability	• Opportunities to collaborate with HEIs and schools for expansion and increasing enrolments in online programmes and branch campuses in other countries • Provide a platform for continuous learning for trainers and mentoring support • ICT transformation opportunity through participation in technology provisioning, infrastructure set-ups and capability development for academic and administrative aspects • Opportunity for setting up data-driven systems for evidence-based policymaking by setting up National/State level data centres for collation of learning data • Opportunity for the private sector to be involved as experts in setting up and operationalising of the National Educational Technology Forum (NETF)	Ongoing

S. no.	Stakeholder(s)	Focus areas	Key action points	Timelines
15	Faculty and trainers	Defined Career Progression	• Opportunity to leverage Career advancement opportunities through operationalisation of career progression mechanisms, professional development opportunities and improved incentivisation structures • Minimal career gap and continuous learning opportunity for trainers • Rationalisation of teaching duties and greater autonomy to faculty to design curricular and pedagogical approaches will lead to improved teaching outcomes. • Reduced focus on non-academic work to give more time for student support and research	Ongoing
16	Students or Beneficiaries	Flexibility and Choice	• More opportunities to enter the education system through enhanced scholarships, quality ODL and online degree programs that permit remote studies • Opportunity to make course choices and decide the pace of study • Global exposure for Indian students through exchange programmes and setting up of foreign university branch campuses in India	Ongoing

Glossary

ABC	Academic Bank of Credit
AC	Autonomous degree-granting College
AI	Artificial Intelligence
AICTE	All India Council for Technical Education
AR/VR	Augmented Reality - Virtual Reality
B.Ed.	Bachelor of Education
BOG	Board of Governor
DIKSHA	Digital Infrastructure for Knowledge Sharing
DGT	Directorate General of Training
ECCE	Early Childhood Care and Education
EMIS	Educational Management Information System
GEC	General Education Council
GER	Gross Enrolment Ratio
HE	Higher Education
HECI	Higher Education Commission of India
HEGC	Higher Education Grants Council
HEI	Higher Education Institution
ICT	Information and Communication Technology
IDP	Institutional Development Plan
IIT	Indian Institute of Technology
IIM	Indian Institute of Management
ITI	Industrial Training Institute
IToT	Institute of Training of Trainers
MERU	Multidisciplinary Education and Research Universities
NAA	National Accreditation Agency
NCERT/SCERT	National / State Council of Educational Research and Training

NCFTE	National Curriculum Framework for Teacher Education
NCVET	National Council for Vocational Education and Training
NEP	National Education Policy (2020)
NETF	National Educational Technology Forum
NHERA	National Higher Education Regulatory Authority
NHEQF	National Higher Education Qualification Framework
NGO	Non-Governmental Organisation
NLU	National Law University
NPE	National Policy on Education (1986)
NPST	National Professional Standards for Teachers
NRF	National Research Foundation
NSDC	National Skill Development Corporation
NSQF	National Skills Qualifications Framework
NSTI	National Skill Training Institute
NTA	National Testing Agency
ODL	Open and Distance Learning
PARAKH	Performance Assessment, Review and Analysis of Knowledge for Holistic development
Ph.D	Doctor of Philosophy
RPWD	Rights for Persons with Disabilities
SC	Scheduled Caste
SDG	Sustainable Development Goal
SEDG	Socially and Economically Disadvantaged Groups
SQAAF	School Quality Assessment and Accreditation Framework
ST	Scheduled Tribe
SWAYAM	Study Webs of Active Learning for Young Aspiring Minds
UGC	University Grants Commission

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