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GLOSSARY

ABC	Academic Bank of Credits
AISHE	All-India Survey on Higher Education
BRICS	Brazil Russia India China South Africa
CEO	Chief Executive Officer
COIL	Collaborative Online International Learning
ELT	English Language Testing
EY	Ernst & Young Global Limited
FICCI	Federation of Indian Chambers of Commerce and Industry
GER	Gross Enrolment Ratio
GoI	Government of India
HE	Higher Education
ICT	Information and Communications Technology
ILO	International Labour Organization
IT	Information Technology
ITeS	Information Technology Enabled Services
LMI	Labour Market Information
MSDE	Ministry of Skill Development
NASSCOM	National Association of Software and Service Companies
NAPS	National Apprenticeship Promotion Scheme
NATS	National Apprenticeship Training Scheme
NDLI	National Digital Library of India
NEP	National Education Policy 2020
NGO	Non-Governmental Organization
NHEQF	National Higher Education Qualifications Framework
NMEICT	National Mission on Education through Information and Communication Technology
NSDC	National Skill Development Council
NSO	National Statistical Office
NSQF	National Skills Qualifications Framework
PTE	Pearson Test of English
SWAYAM	Study Webs of Active Learning for Young Aspiring Minds
TVET	Technical and Vocational Training
UGC	University Grants Commission
UK	United Kingdom

INTRODUCTION

The transformation of India's Higher Education (HE) sector, as articulated through the National Education Policy (NEP) 2020, presents an exciting opportunity for innovative interventions from both domestic and international providers. Core to India's HE reform, the NEP addresses some of the key challenges facing the sector including; access, formalisation of technical and vocational training (TVET) and internationalisation.

This paper, developed in collaboration by the UK India Business Council (UKIBC) and Pearson, explores these themes in more detail, identifying key issues and opportunities for international contributions towards their realisation. The paper draws on desk research conducted in the UK and India, and from insights shared during a NEP roundtable held on the 21st March 2022, with input from representatives from the UK and India's HE and skills sectors.

The NEP has identified access, delivered through a more progressive, equitable, and quality driven HE system, as a key policy priority. This includes promoting the design and delivery of educational models relevant to the needs of individuals, industry and society. The NEP emphasises that the transformation of the Indian HE sector will have to be built on innovative delivery that enriches learning experiences, promoted through enhanced funding models, including for research and faculty development. This policy focus is further shaped by the prioritisation of HE internationalisation fueled by global partnerships and learner mobility.

According to the UKIBC report; ['Beyond the Top 200 – Effective International Collaboration for the Indian Higher Education'](#) (2018), it is expected that almost 140 million learners will be entering India's HE sector by 2030. The need to transform the Indian HE sector's capacity to meet this demand represents an exciting opportunity for international providers and experts to make a contribution through the introduction of global good practice, including in the priority areas explored in this paper: online learning, TVET pathways, and international mobility and partnerships.

EDUCATION ACCESS IN INDIA

The scale of the challenges being addressed through the NEP can be understood through the critical issue of access. The importance of promoting access to HE is reflected in India's gross enrolment ratio at tertiary level compared to its global peers (figures 1A and 1B).

Figure 1A: Gross Enrolment Ratio at Tertiary Level in India and Developed Countries

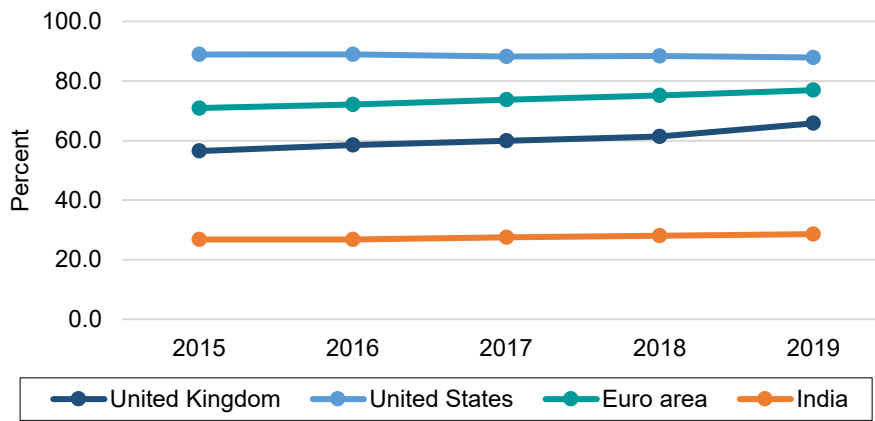
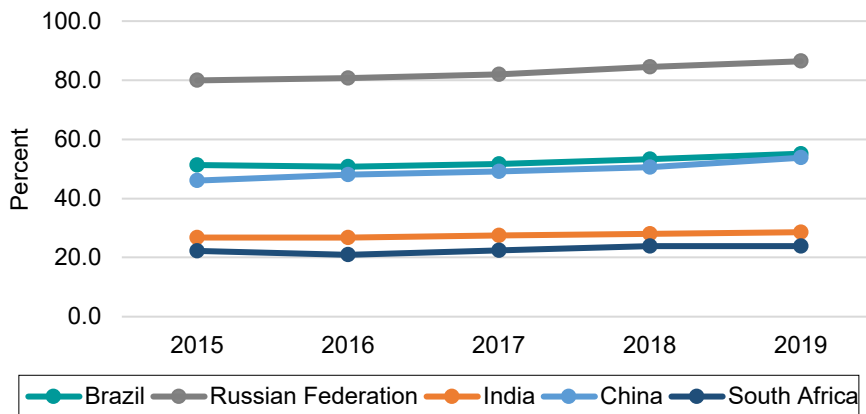


Figure 1B: Gross Enrolment Ratio at Tertiary Level in BRICS Nations

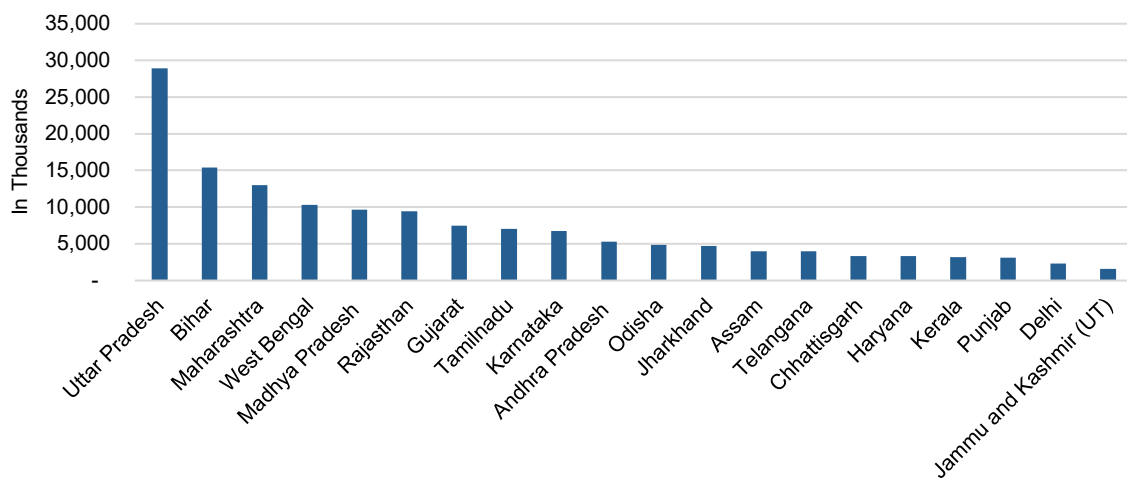


Source: World Development Indicators, World Bank

In 2019, India (28.6 per cent) lagged behind in its Gross Enrolment Ratio (GER) compared to the developed world: United States (87.9 per cent), Euro Area (76.9 per cent) and United Kingdom (65.8 per cent). In comparison to the BRICS nations, India showed better performance than South Africa (23.9 per cent) but lower in comparison to: Brazil (55.1 per cent), Russia (86.4 per cent) and China (53.8 per cent).

Demographic data helps to contextualise the scale of the challenges being addressed through the NEP. In 2021, the Expert Committee on Population Projection (Ministry of Health and Family Welfare), estimated that India’s 18 to 23 years demographic was 152 million. A state-wise disaggregation of the Committee’s figures shows that: Uttar Pradesh (28 million), Bihar (15 million), Maharashtra (12 million), West Bengal (10 million) and Madhya Pradesh (9 million), are the top five States in constituting the demand for learning, skills and qualifications (figure 2).

Figure 2: State-wise Projected Population for India in 2021 (18 to 23 years)



Source: Report of the Expert Committee on Population Projection, Ministry of Health and Family Welfare, Government of India, July 2020.

ONLINE LEARNING IN INDIA

The utilisation of online learning and blended delivery models is becoming increasingly acknowledged as an important opportunity to promote access to HE in India. The growing prioritisation is articulated through the NEP's recommendations for online learning development, including; investing in digital infrastructure, online learning tools, teacher training, implementing online assessment, enhancing access to digital materials, and an increased focus on effective blended learning models.¹

Moreover, ICT based educational reforms are being driven through the '*National Mission on Education through Information and Communication Technology*' (NMEICT) policy. The NMEICT looks to leverage ICT's teaching and learning potential to benefit HE learners. Launched in 2009, it focuses on; e-learning pedagogy, opportunities for conducting online experiments in virtual laboratories, online testing and certification, online availability of teachers to guide and mentor learners and the utilisation of direct to home TV channels. The initiative has been given an allocation Rs. 400 crores or approximately GBP 40 million for 2022-23. The NMEICT has supported the development of the '*Study Webs of Active Learning for Young Aspiring Minds*' (SWAYAM) initiative. SWAYAM is an integrated platform offering online courses, covering school (9th to 12th grade) to Postgraduate Level. The initiative's online courses are also being used by wider learner groups as part of lifelong learning programmes.

NMEICT has also sponsored the National Digital Library of India (NDLI) project, to develop a framework for a virtual repository of learning resources with a single-window search facility. It is being developed to allow learners to access global knowledge and to facilitate researchers to perform inter-linked exploration from multiple sources.

Alongside these policy interventions, the impact of COVID-19 has resulted in the increased delivery of online tuition and assessment in India, and indeed around the world. This has seen a growing confidence and acceptance of online delivery models and openings for e-learning opportunities and platforms. The Ministry of Education has supported this process by introducing ICT capacity building initiatives to assist educators and learners in the delivery of new education techniques, such as E-learning and M-learning.² According to a study by EY and FICCI; 'Higher Education in India' (February 2021), there has been a significant increase in the HE sector's utilisation of virtual platforms. The study showed that 48 per cent of surveyed providers utilised MS Teams, with 23 per cent reporting the use of Zoom and Google Classroom.³

¹ https://www.ugc.ac.in/pdfnews/6100340_Concept-Note-Blended-Mode-of-Teaching-and-Learning.pdf

² <https://www.education.gov.in/en/ict-initiatives>

³ <https://www.ficci-hes.com/pdf/2021/eyreport.pdf>

This Indian experience has been replicated in global HE sectors, including the UK. During the NEP roundtable discussion, Prof. Moyra Boland, Professor of Creative Pedagogy & Dean for Global Engagement in Central and South Asia, University of Glasgow, described how the impacted of COVID-19 had seen the University accelerate its online learning offer, making it essential that staff are supported in acquiring the required skills and students have access to different quality delivery mediums. The University's online approach also included a focus on equality and social justice related to access through the use of, and engagement with, technology.

There remain significant challenges in regard to access to IT infrastructure which need to be addressed to ensure that realisation of opportunities provided by new technology and pedagogic models. According to India's National Statistical Office (NSO) in India, 10.7 per cent and 23.8 per cent households have access to a computer and the internet, respectively. The rural-urban gap is also evident, with 42.0 per cent of urban households having access to the internet in contrast to 14.9 per cent of rural households in 2017-18 (NSO, 2019).⁴ However, the COVID-19 pandemic has impacted learning beyond the classroom by focusing on the needs and opportunities to build more online platforms and supporting initiatives.

International providers are also contributing to India's online education reforms. During the NEP roundtable (as mentioned in the introduction of this white paper), held as part of this paper's development, Siddharth Banerjee, Managing Director, India & Asia, Pearson, described the development of digital assessment platforms and e-libraries that can be used to diversify and enhance HE models. Professor Moyra Boland described Glasgow's Collaborative Online International Learning (COIL) programme, which encouraged the use of online tools to develop content and co-teaching modules for higher education curriculum across different time zones, geographies and institutions.

Case Study: Using technology as a platform for international collaboration

The University of Glasgow's School of Education and Indian Institute of Science Education and Research (IISER) Pune have established an international virtual hub, a centre for STEM Education and Social Justice. The Hub will serve as a platform to bring together educators and researchers from a range of disciplines to strengthen approaches to inclusive, evidence-based, transformational teaching and learning.

With the support of a British Council Going Global Exploratory Grant for this project, Dr Rodolico and Dr Deshpande developed STEM workshops into a full course. As well as providing hands-on STEM challenges, the course will integrate language and gender in a holistic approach to teacher education. The collaboration sought to include a strong representation of women in STEM, with female STEM professionals among the tutors from both institutions.

The teams will explore how best to embed it into ongoing courses such as the Master of Education (MEDuc) Initial Teacher Education (ITE) programme at Glasgow and STEM Education programmes in IISER Pune, to ensure sustainability and scale-up impact.

⁴ https://www.mospi.gov.in/documents/213904/534682//KI_Education_75th_Final1602843694477.pdf/ac3d321b-dcdf-5546-413a-34961aeee19b

TVET PATHWAYS

The NEP also has a strong focus on the development of industry relevant education and training that promotes learners' successful transition to employment. According to the International Labour Organization (ILO), India is facing a 29 million skill-deficit (gaps between supply and demand of labour) by 2030.⁵ In 2019, 53 per cent of Indian businesses were unable to hire candidates and several job positions remained unfilled owing to the skill gaps that exists across various industries.

The Annual Report (2020-21) of the Ministry of Skill Development (MSDE) identifies incremental identifies incremental skill and training requirements across various sectors as 128.21 million persons from 2017 to 2022. The largest skills demands are in sectors such as electronics & IT-ITeS (6.9 million persons), and textiles, handloom & handicraft (6.0 million persons). Construction and retail are expected to contribute heavily to skills demand, including through cross cutting skills required in other sectors. Skills demand at the state-level, in terms of number of people, include; Maharashtra (15.5 million), Sikkim (14.7 million), Tamil Nadu (14.7 million), Uttar Pradesh (11.0 million) and Andhra Pradesh (10.8 million).⁶

This key challenge means that India has increasingly prioritised the development of industry relevant skills through introducing reforms in both the HE and TVET sectors. A key NEP objective is to increase TVET enrolments, including through interventions promoting the delivery and assessment of vocational education in partnership with industry and NGOs, and the development of strong Labour Market Information (LMI) to identify skills gaps and determine industry demand. In addition, the NEP emphasizes the need for TVET to be delivered through multidisciplinary approaches that prepare learners with relevant employability and technical skills required both for today's and tomorrow's economies. This includes preparing learners for work in the fourth industrial revolution through an understanding of emerging areas such as: artificial intelligence, machine learning, big data, and genomic studies.

Kirti Seth, CEO IT-ITeS Sector Skill Council, NASSCOM, described how the NEP has been truly transformational especially in incorporating industry suggestions at the early stage of design to help bridge the gap between industry relevant skills and academic learning. This has led to a more enabling environment which simultaneously allows industry to meet its skills needs and helps academia to deliver relevant and impactful training. This approach has included a focus on establishing key frameworks such as the National Skills Qualifications Framework (NSQF), the National Higher Education Qualifications Framework (NHEQG) and the Academic Bank of Credits (ABC) to support the mapping of skills and learning. The reforms

⁵ <https://economictimes.indiatimes.com/tech/tech-bytes/organisations-around-the-world-are-struggling-with-skill-gap-says-yvette-cameron/articleshow/84550321.cms>

⁶ [Skill Dev English AR 2021.pmd \(msde.gov.in\)](#)

aim to deliver quality and relevant learning, employability of students after graduation, introducing skilling at the school level and, importantly, embracing technology for achieving scale and standardisation.

TVET is typically being delivered in the HE sector through bachelor degree and diploma programmes. According to the All-India Survey on Higher Education (AISHE) (2019-20), enrolment in Bachelors of Vocational Education and Diploma in Vocational Education stood at 45,982 and 8,269 students, respectively. While the degree programme is more popular among males (56.0 per cent of total enrollment), the diploma course attracted more females (72.4 per cent of total enrollment).

In line with the Government of India's (GoI) prioritisation of the mainstreaming TVET, the UGC released policy guidelines for HE delivered apprenticeships/ internships and embedded degrees (2020).⁷ The policy also supported the mapping of TVET with academic pathways and the embedding of industry associations partnerships in the designing of apprenticeship programmes with a strong focus on employment linked technical and soft skills.

The Government of India (MSDE) has also introduced the National Apprenticeship Training Scheme (NATS), which provides practical training opportunities and certification in partnership with employers and HE/ TVET institutions.⁸ This strategic initiative being further supplemented by the National Apprenticeship Promotion Scheme (NAPS). India's apprenticeship reform initiatives have been allocated Rs. 500 crore or approximately GBP 50 million for 2022-23 as per the latest Union Budget, which is an indication of their enhanced position in India's HE and TVET sectors.

The National Skill Development Council (NSDC) plays a key role in the realisation of India's skills agenda through the promotion of skills development in collaboration with the private sector. This has included the development of 36 sector skill councils which have strengthened labour market dialogues in target sectors, such as: hospitality, media, IT, agriculture, aerospace, electronics, food and healthcare.

In the case of the healthcare sector, Dr. Srinivasa Rao, CEO, Apollo MedSkills, described how NEP reforms had promoted: holistic learning which facilitates development of soft skills, IT skills, languages and culture understanding, multi-disciplinary approaches to promote the possibility of collaboration in the medical and nursing fields, and enhanced allied health and support services by augmenting vocational education in schools and skilling at the 10+2 level.

⁷ https://www.ugc.ac.in/pdfnews/9105852_ugc-guidelines_ApprenticeshipInternship.pdf

⁸ <https://indianexpress.com/article/education/national-apprenticeship-training-scheme-to-continue-for-next-5-years-7639651/>

Industry support has been formalised through models such as; identification of occupational standards, skills centres, training delivery, CSR funding and candidate sponsorship⁹ The All India Council for Technical Education (AICTE) leads on the education sector's supply of TVET, which, as of 2020-21, included more than 9,600 institutions covering a total enrollment of more than 3 million students across various disciplines.¹⁰ Dr. Srinivasa Rao spoke of how fresh ideas have emerged in the skills sector, including a greater willingness to develop and deliver standards, training and assessment through established corporate, HE, industry and government partnerships. This dynamic includes State Governments, who are racing towards attracting investments and talent.

However, despite these initiatives, reforms and budgetary allocation, there remains significant challenges facing India's TVET sector, including how to find scalable models that allow the delivery of quality, industry relevant training, at the demanded scale. There are also issues with the low uptake of apprenticeships, lack of trainers, quality of training infrastructure and resources, gaps in employer and TVET provider engagement, and the need for more harmonised assessment and certification frameworks.¹¹

International providers can play a role in addressing these challenges. For example, Pearson has promoted the introduction of employment focused [BTEC Qualifications](#), which support learners develop the knowledge, skills and behaviors demanded by employers and universities. It is also important that the sustainability of these interventions can be secured through institutional partnerships which help to enhance and scale domestic provision.

Case Study: FutureSkills Prime

Latest research estimates the demand supply gap for Digital Tech Talent to increase 3.5x+ by 2026 to 1.4M-1.8M. FutureSkills Prime (FSP) is the first of its kind public-private partnership; a digital skilling platform built by the Government of India & Industry for all citizens, as a lighthouse scheme under the Government's Trillion Dollar Digital Economy initiative. It has been developed as an affordable, and credible programme, offering courses in priority emerging technologies and professional skills for defined target segments.

The total employee base of the IT-BPM Industry in India (as of FY 2017-2018) was around 3.97M. Research has identified that due to growing automation, the emergence of disruptive as well as new technologies, about 30% of the existing workforce will require re-skilling/ up-skilling to stay relevant. This includes a need for about 50-60% of the workforce to receive continual re-skilling/ up-skilling. In 2018, the NASSCOM FutureSkills platform was unveiled by the Hon'ble Prime Minister Narendra Modi, with a focus on creating skills for new technology enabled jobs in India. The Government of India invited NASSCOM to extend this platform to all Indian citizens and FutureSkills Prime went live in November 2022 as India's digital skilling platform.

⁹ <https://nsdcindia.org/industry-partnership-csr>

¹⁰ <https://facilities.aicte-india.org/dashboard/pages/dashboardaicte.php>

¹¹ [Skill Dev English AR 2021.pmd \(msde.gov.in\)](#)

Funded by MeitY (Ministry of Electronics and Information Technology), FutureSkills Prime offers courses in emerging technologies aligned to National Occupational Standards (NOS), which ensures that all learners have an acceptable level of competency quality/performance which helps provide an emerging technologies talent pool for organizations to recruit from. Some State Higher Education Councils are incorporating skill-based learning in their curriculum with credits, which also ties in with the objectives of NEP 2020 of having a student centric approach based on accessibility and affordability.

A key objective of the FSP is to propel India as a hub of talent in emerging technologies, through a target of re-skilling/ up-skilling a total of about 0.4M people on new & emerging tech over three years. To achieve this, NASSCOM has collaborated with a broad set of sector stakeholders, including; industry, online content providers, CDAC (Centre for Development of Advanced Computing) and NIELIT (National Institute of Electronics & Information Technology).

The platform allows learners to exit at multiple points in their learning journey. They can earn badges for digital fluency and certificates from courses aligned to the government-approved curriculum. This includes through blended learning programmes delivered from key partners like CDAC/NEILIT. The platform offers a variety of courses including; Foundation, Deep skilling, and Bridge Course. It also provides courses on popular tech topics and professional skills, programming languages and virtual labs etc.

This upskilling ecosystem is using innovative approaches and deep expertise to deliver tangible and sustainable results. Since its inception in November 2020, FutureSkills Prime has had 0.7M+ signups, 86.7% of whom are youth, a step forward in making India the Digital Talent Nation of the world. The platform has also achieved over 125k completions; of these over 78k+ completions are for courses aligned to the National Occupational Standards.

As they say it 'takes a village ...' and FutureSkills Prime is a perfect example of collaboration across the ecosystem that leverages technology to scale employability-focused learning from initial diagnosis to employment.

ENGLISH LANGUAGE AND MOBILITY

There is a growing understanding of the key role that internationalisation can play in the HE sector development for students, faculty and institutions, and how these areas can be developed through virtual mobility and platforms.¹² India's internationalisation agenda has been supported through the introduction of University Grants Commission (UGC) draft regulations on the delivery of dual degrees, joint degrees and twinning programmes (2021). The regulations have been finalised and officially announced in May 2022.¹³ The implementation of these regulations will enhance opportunities for institutional partnerships, student mobility, and the further recognition of international and online delivery models.¹⁴

Ridhima Sharma, Head Legal and International Compliance, Karnavati University (Gujarat), shared how internationalisation takes centre stage in the NEP, including through a focus on 'internalisation at home'. As none of India's universities currently feature in the top 100 global rankings, there have been several initiatives to promote the introduction of global provision and expertise, through opening branch campuses, in India and overseas, and facilitating the legislative framework for international partners' market entry.

Indian HEIs are also expected to establish international student offices, pursue research collaborations, promote student exchanges, accept the accumulation of credits acquired in foreign universities towards the award of degrees, and use partnerships to grow expertise and accreditation. This approach will boost international cooperation, capacity building, engagement, mobility and provide meaningful opportunities within the context of internationalisation.

In summary, the realisation of the NEP goal of '*Internationalisation at Home*' and promoting India as a 'global study destination', is being delivered through a number of key drivers focusing on: global quality standards, attracting foreign students, facilitating research and teaching collaborations, international branch campuses in India and overseas, and recognition of credits acquired overseas towards award of domestic degrees.

The prominent role of English in realising these objectives means that quality-driven English language testing makes an important contribution to the NEP's internationalisation agenda. The scale of the global demand for internationally recognized English Language Testing (ELT) qualifications is illustrated by the demand for tests such as [Pearson's PTE](#), which is the world's leading computer-based test of English, increasingly being used for immigration, citizenship, and study abroad purposes.

¹² [IHE Guideline 1-20 \(ugc.ac.in\)](#)

¹³ [UGC letter regarding: UGC Regulations to offer Twinning, Joint Degree and Dual Degree Programmes](#)

¹⁴ <https://theprint.in/india/up-to-15-pc-rise-in-number-of-indian-candidates-taking-ielts-exam-since-pre-covid-years/802424/>

The importance of global mobility, in the UK-India context, is shown by data (2021) that has India ranked first for UK work visas (over 58,000) and second for UK student visas (over 90,000 (Figures 3 and 4):

Figure 3: Entry Clearance Work Visa granted by Nationality (2021)

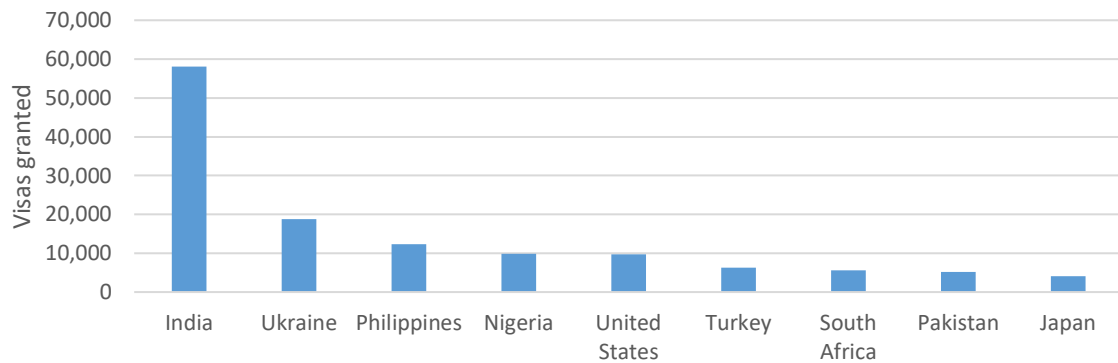
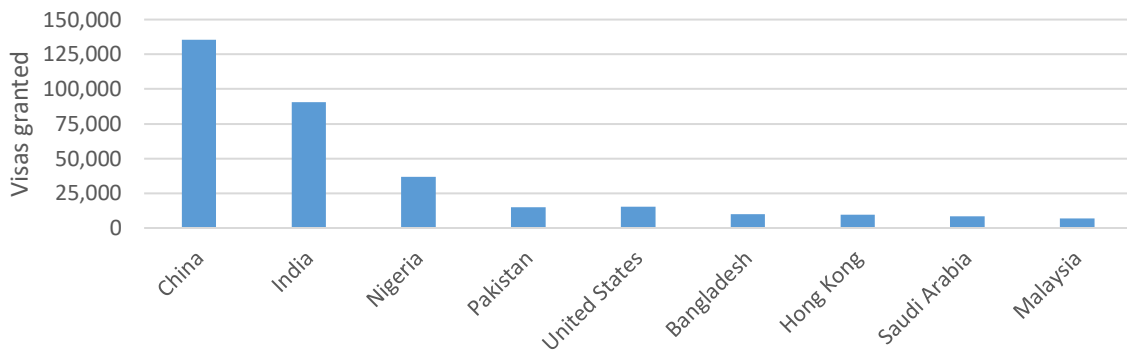


Figure 4: Entry Clearance Student Visa granted by Nationality



Case Study: Pearson Test of English (PTE)



PTE has been operating in India for more than 10 years, helping hundreds of thousands of young people pursue their ambitions of moving to Australia, the UK and elsewhere for work, study and migration purposes. In November 2019, it was awarded a license from the UK Home Office to be accepted for visa purposes, and since then there has been an increasing number of candidates in India using their PTE scores as part of their visa and university applications in the UK.

CONCLUSION

The NEP provides a framework for India's HE reforms and a platform for international providers contributions. NEP policies reflect the changing dynamics in traditional education models with key drivers including: online learning, employment and employer orientated skills development and international delivery. The COVID-19 pandemic has accelerated this process through promoting innovation in the use of digital content, learning, assessments and certification.

UKIBC will continue to work closely with UK and Indian stakeholders to understand the policy implementation of the NEP and advocate for the reforms that positively impact on the UK-India partnership opportunities. This will include key areas of internationalisation, industry linkages and the introduction of innovative delivery models.

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