May 2025

K12 EDUCATION SECTOR OVERVIEW

India | South Asia

Where Futures Begin

INDEX

Introduction

From Acumen's Lens

India's K-12 education sector is not only one of the largest in the world, with over 260 million students across 1.5 million schools, but also one of the most vibrant, diverse, and ambitious. It serves as the engine room of India's globally respected talent pipeline, producing future leaders, entrepreneurs, researchers, artists, and changemakers who are now leading across the world.

This ecosystem is a wonder in itself. Spanning multiple boards, languages, curricula (national and international), and regional variations. The sheer complexity and reach of this machinery, operating across metros, tier-2 cities, and rural India is unmatched globally.

More importantly, the evolution is rapid. According to the Economic Survey 2024–25, the Gross Enrollment Ratio (GER) in higher education rose from 23.7% in 2014–15 to 28.4% in 2021–22 for the 18–23 age group[1]. The boundary between K-12 and higher education is shrinking fast, driven by ambitious students, globally aware parents, and schools that are increasingly focused on career outcomes. Students are making decisions about universities, countries, and disciplines earlier than ever before and schools are becoming the launchpads for those choices.

Concurrently, advancements in technology-enabled learning, career counseling, and skill-based education are reshaping student expectations and prompting universities to adopt more strategic outreach approaches.

For international universities, the K-12 sector in India offers a vital opportunity, not just to build awareness, but to form lasting engagement, strategic partnerships, and future-ready pipelines. It's a space where meaningful conversations can begin, long before an application is submitted.

As the lines between K-12 and higher education continue to blur, India's educational ecosystem stands poised to play a pivotal role in shaping the future of global talent and innovation.

"The future of global higher education begins not at university gates, but in classrooms where curiosity first meets ambition. How international Higher Ed institutions create ecosystems with schools as a core component will determine the future sustainability and relevance of higher education."

Sagar Bahadur
Executive Director - South & South East Asia

Report Overview

This report builds on Acumen's 2024 India K–12 Education Sector Overview, offering a deeper exploration of current policies and trends. It provides detailed insights into key areas, including government mandates such as reservations for EWS (Economically Weaker Sections) in schools, the growing emphasis on vocational subjects, decision-making processes among students regarding career pathways, and the functioning of two of India's largest state education boards.

[1] *Ministry of Finance. (2024). Economic Survey of India 2024–25. Government of India.*

K-12 Education in India: Recent Developments & Shifting Subject Preferences

In the academic year 2023–24, India recorded a marginal increase in the total number of schools, rising from 1,466,109 in 2022–23 to 1,471,891[2]. Notably, residential schools offering boarding facilities continued on their upward trajectory, increasing from 41,983 to 43,389 institutions.

Government schools constitute approximately 69% of all schools in India, whereas private schools account for 22.5%. However, this distribution does not proportionally reflect student enrollment. Despite representing a larger share of total schools, government institutions serve only 51.4% of the student population. In contrast, private schools, although fewer in number, enroll a significant 36.3% of students nationwide.

These figures underscore India's growing reliance on private education and the expanding role of residential schools, which collectively shape subject-level preferences and learning environments at the high school level.

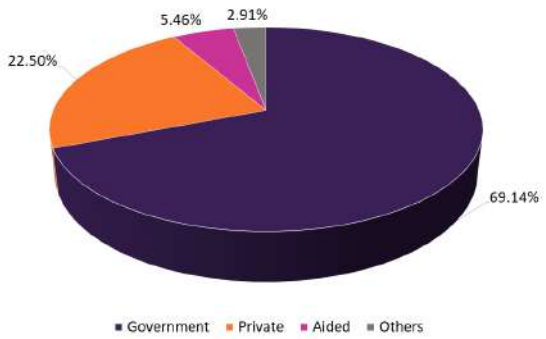

Figure 2 : Type of schools in India in 2023-24
(Source: AISHE report, 2023-24)

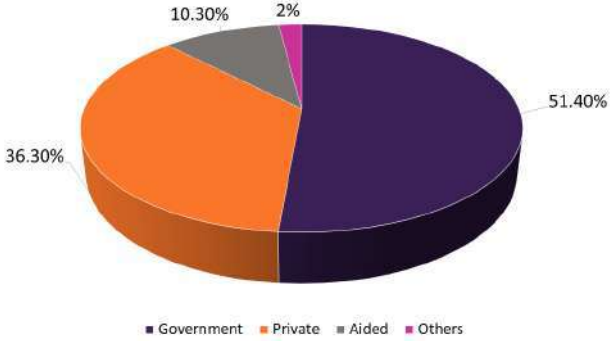

Figure 3 : Students by the type of schools in India in 2023-24
(Source: AISHE report, 2023-24)

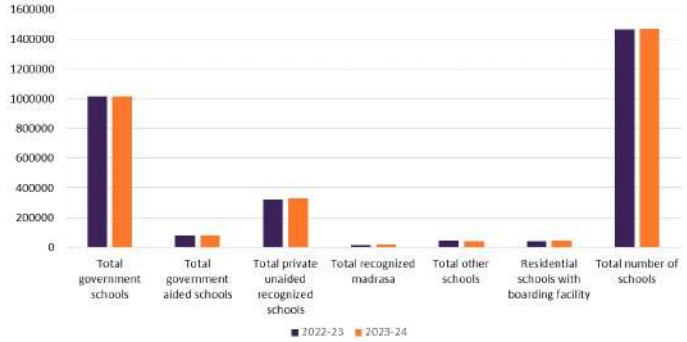

Figure 1 : Number of K12 Schools in India in 2022-23 and 2023-24
(Source: All India Survey on Higher Education (AISHE) reports)

[2] *Ministry of Education. (n.d.). AISHE Institution Directory. Government of India. Retrieved April 22, 2025.*

According to data from the Ministry of Education's official portal, 18% of schools in India are situated in urban areas, while significantly, the remaining 82% are located in rural regions, highlighting the predominantly rural nature of the country's K–12 education infrastructure.

Gender distribution among students remains relatively balanced; 52% of enrolled students are boys and 48% are girls. Enrollment figures across educational levels indicate that 26% of students are at the secondary level (Grades 9–10), while 27% are in the middle school stage (Grades 6–8), reflecting the steady progression of students through the upper levels of schooling.

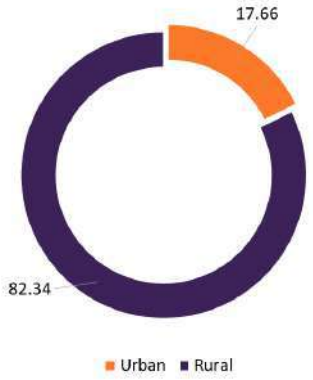

Figure 4 : Total number of schools in India according to location in 2023-24 (Source: AISHE report, 2023-24)

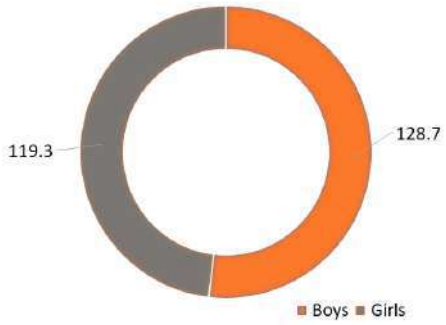

Figure 5 : Number of girls and boys in all Indian schools in 2023-24 (Source: AISHE report, 2023-24)

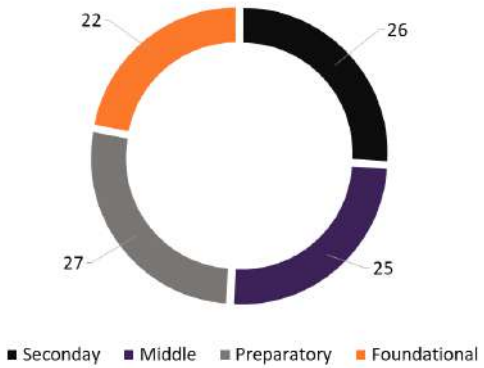

Figure 6 : Proportion of students by various educational levels in India in 2023-24 (Source: AISHE report, 2023-24)

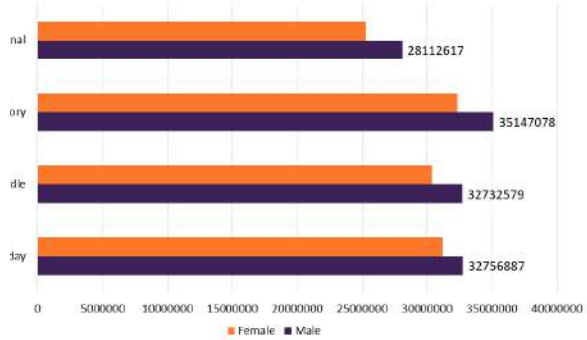

Figure 7 : Number of students by educational level and gender in India in 2023-24 (Source: AISHE report, 2023-24)

Shifting Subject Preferences

As of 2023, data from the Ministry of Education indicates that science remains the most preferred stream among students after Class 10, with 43% opting for it, followed closely by arts, chosen by 39%. The data further highlights notable gender-based trends: boys are more inclined to pursue science, while girls are more likely to select arts. In terms of academic performance, girls have a slightly higher pass percentage than boys in the science stream, and a significantly higher pass rate in the arts stream.

Higher Education Subject Preferences in India

According to the latest All India Survey on Higher Education (AISHE) data, as of 2022, the most popular broad subject area at the undergraduate level in India is Arts, accounting for 34% of total enrollments. While Science is the most popular stream after Class 10, Arts subjects are more popular at the undergraduate level. The Arts category includes humanities and social sciences, excluding education. Science courses—comprising disciplines like Physics, Chemistry, and Biology, but excluding Medical Science, IT & Computer Science, and Engineering—account for 15% of enrollments at the UG level, followed by Commerce (13%) and Engineering & Technology (12%).

At the postgraduate (Master's) level, Social Science leads with 21% of enrollments, followed by Science (15%) and Management (14%). At the doctoral (Ph.D.) level, the highest enrollment is in Engineering & Technology (25%), closely followed by Science (21%), reflecting India's emphasis on research and development in technical and scientific fields. Further insights into subject preferences can be drawn from CUET UG (Common University Entrance Test – Undergraduate), a standardized national-level exam conducted by the National Testing Agency (NTA) for admissions into undergraduate, postgraduate, and doctoral programs across India.

According to CUET UG 2024 data, English emerged as the most popular subject, with 10,07,645 registrations and over 0.8 million actual test-takers. The choice of English was followed by Chemistry and Physics (aligned with the popularity of the science stream at high school level), each attracting 0.6–07 million registered students, reflecting strong interest in both language and science disciplines among India's youth.

In addition to Science and Arts streams, subjects such as Biology, Biotechnology, Biochemistry, and other life sciences continue to attract a significant number of students, highlighting growing interest in health, research, and allied sciences. Within the Arts stream, Economics, Political Science, and History consistently record the highest number of registrations, making them the most sought-after subjects in CUET.

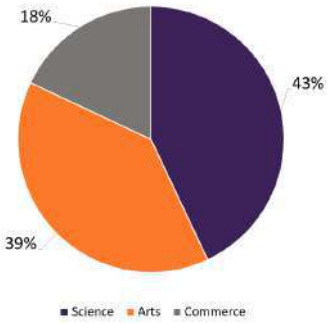

Figure 8 : Stream-wise proportion of students in India in 2023-24 (Source: AISHE report, 2023-24)

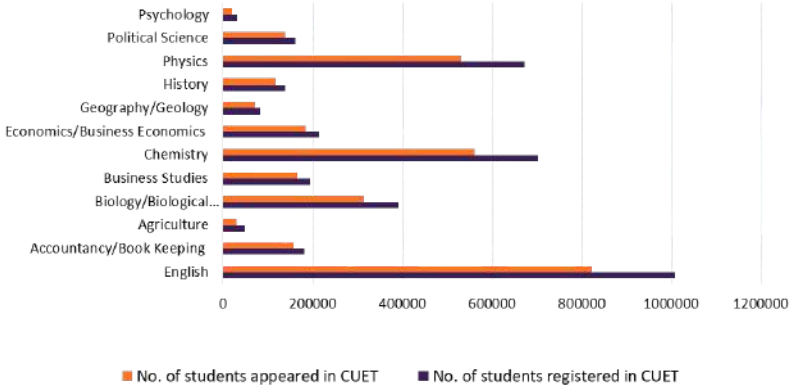

Figure 9 : Most popular subjects in India according to CUET UP 2024 Exam (Source: CUET database[3])

"A number of students are opting for subjects like AI , Psychology, Political Science, History and Legal studies, even though as schools which are focussed on Sciences, we continue to support students for competitive exams like JEE and NEET . The interest in Humanities seems to be growing . Economics is another subject extremely popular with students as a number of students want to pursue undergraduate level."

Dr. Neeta Bali
Director Academics, Modern Vidya Niketan Schools, UP and Haryana

3 *National Testing Agency. (n.d.). Common University Entrance Test (CUET)*

Proposed Curriculum Changes by CBSE

The CBSE has proposed major curriculum reforms to be implemented soon, impacting nearly 27 million students in the coming years, aiming to provide a more holistic and inclusive education. These changes include:

- Addition of a third language (with at least two Indian languages) for Classes 9–10, and an increase in the number of subjects from 5 to 10 by incorporating vocational, environmental, art, and well-being education.
- In Classes 11–12, students will now study six subjects, including two languages, one of which must be Indian. At present, class 9 and 10 students study two mandatory languages, while Class 11 and 12 students study one language.
- The new system shifts from a marks-based to a credit-based model, where students pass by completing 1200 learning hours annually, and grading is done on a relative scale, with formative as well as summative assessments to gauge holistic learning.
- A shift from memory-based assessment to a multidisciplinary approach emphasizing 21st-century skills like problem-solving, critical thinking, and creativity. There is also greater focus on holistic development, integrating traditional and constitutional values, civic responsibility, animal welfare, environmental awareness, and sustainable living.

These curriculum changes reflect a broader national push—driven by the NEP 2020 and NCF 2023—towards greater flexibility, skill integration, and holistic learning, with vocational education emerging as a key pillar of this transformation.

"Our system offering a varied platter of interdisciplinary subjects, instead of the conventional three-stream subject combination system, has been taken from NEP. Students get to choose 5 out of the nearly 20 subjects that we offer to everyone. Moreover, considering the emphasis that NEP has laid on bilingualism and proficiency in mother tongue, we have been teaching Marathi to our students till Grade 10. Earlier it was till Grade 8. Inclusivity remains a cornerstone approach, especially for the Right To Education students. Acknowledging their limited exposure to English, which often affects their performance across subjects, we have established a dedicated English as a Second Language (ESL) department. Here, trained teachers meticulously work with these students to build functional English skills and foundational linguistic competence Grade 1 onwards. As these students move to higher classes and find it challenging to transition to the increasing difficulty level of the academics, they are offered the Open School (NIOS) programme, where they can learn at thier pace and focus on acquiring practical skills. For the students suffering from visual impairment and learning disabilities, we offer subjects better suited for their individual strengths and performances."

Nirmal Waddan
Principal, The Kalyani School, Pune

Vocational Education & Industry related Subjects in Schools: Growth and Influence of the NEP

The National Education Policy (NEP) 2020 places strong emphasis on the integration of vocational education into mainstream school curricula, leading to a notable increase in student participation. According to CBSE data, the number of students opting for vocational subjects has risen significantly over the past three years.

Introduced formally in the 2019 board examinations, vocational course enrollments grew from 772,419 students across 9,534 schools in 2021–22 to 1,713,213 students in 23,752 schools in 2024–25.

CBSE attributes this sharp increase to the introduction of occupation-oriented skill subjects such as Information Technology (IT), Artificial Intelligence (AI), Physical Activity Training, Tourism, Beauty & Wellness, Yoga, Retail, and Marketing.

These fields align closely with emerging industry needs and have captured the interest of a broader student base seeking practical, employment-ready skills. This growing interest in vocational education underscores the early success of NEP 2020 in bridging the academic–industry gap and fostering a culture of skill-based learning in Indian schools.

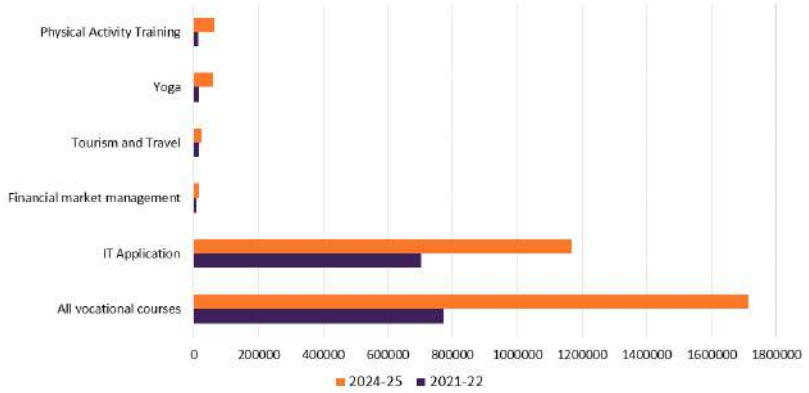

Figure 10 : No. of students taking vocational courses in classes 10 and 12 across India in 2021-22 and 2024-25 (Source: Education Times[4])

Interestingly, vocational course enrollment is higher in Class 10 than in Class 12, as students in higher secondary classes often shift their focus towards preparation for competitive entrance examinations, leading to a tapering in vocational participation at that stage.

Furthermore, vocational subjects are often not recognized by universities, are not considered for eligibility in most academic programs, and typically do not count towards a student's GPA, hence, there is a strong dip in the selection of vocational subjects at this stage.

[4] *Gupta, A. (2025, February 28). CBSE notices a rise in students opting for vocational subjects in classes X and XII. Education Times.*

Expansion of Vocational Subjects and Student Participation in CBSE Schools

The Central Board of Secondary Education (CBSE) currently offers 22 skill-based subjects at the secondary level (up to Class 10), and 43 at the senior secondary level (Classes 11–12). Students in Class 11 can opt for up to three vocational subjects, depending on availability in their respective schools.

This flexibility, combined with the rising relevance of these subjects to real-world careers, has contributed to increased student interest in vocational education.

These trends not only reflect the successful implementation of the NEP 2020's skill integration goals but also signal a broader transformation in how Indian schools are aligning education with industry demands and holistic development.

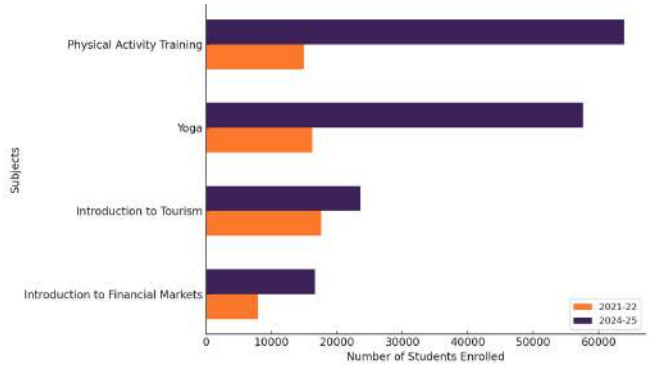

Figure 11 : Enrollment Growth In Vocational Subjects (2021-22 Vs 2024-25)

"My school offers several vocational subjects and foreign languages to our students in Grades 9-12, and we've observed interesting trends in student interest over time. For vocational subjects, we provide courses in Artificial Intelligence and Elements of Business. The AI course has seen particularly strong growth in enrollment over recent years, reflecting the increasing awareness among students about the importance of technological skills in the job market. Elements of Business has maintained steady popularity, especially among students who see entrepreneurship as a potential career path. Regarding foreign languages, we offer French, Spanish, and German through Grade 10. French has consistently been the most popular foreign language choice among our students. We've found that many students are attracted to French for its global utility, cultural significance, and perceived elegance. While we don't currently offer these languages beyond Grade 10, there has been increasing student interest in continuing language studies through the senior years. The popularity of these subjects reflects broader educational trends where students are increasingly looking for skills with practical applications in the global marketplace. With AI and technology reshaping industries, and international communication becoming more important, these offerings help prepare students for diverse post-secondary opportunities. We've also noticed that students who combine these vocational subjects or languages with their core academic subjects often develop interesting interdisciplinary perspectives that enrich classroom discussions and projects."

Asma Ansari
Dean CI and Placements, Daly College, Indore

IBCP: Career Readiness through IB Education

The Career-related Programme (CP) of the International Baccalaureate (IB) meets the needs of students pursuing career-related education. The IBCP prepares students for higher education, apprenticeships, or direct employment through a unique blend of academic and vocational learning. It comprises a minimum of 2-3 IB Diploma Programme (DP) courses, a career-related study, and a core of four components. It comprises three key elements:

Courses from the IB Diploma Programme (DP): There are six subject groups in the DP, including studies in language and literature, language acquisition, individuals and societies, sciences, mathematics, and arts. As part of the IBCP qualification, students are required to take a minimum of 2 and up to 3 IBDP courses.

The CP Core: Four interrelated components form the CP core. They are: personal and professional skills, service learning, reflective projects, and language development.

Career-related studies: This is the heart of the CP, offering students practical, industry-focused learning. It may be delivered through technical/vocational qualifications (like BTECs or SCAD), partnerships with local institutes, or school-designed or accredited programs.

The CP core connects the DP courses and career-related study, fostering the development of personal attributes, professional skills, and intellectual habits essential for lifelong learning. Each school selects a career-related study that aligns with local conditions and student needs. This component must meet IB standards for accreditation, assessment, and quality assurance. With growing recognition of the importance of skill-based education, CP schools are expanding globally, especially in India, reflecting a shift toward more flexible, holistic models of education that blend academic rigor with real-world readiness[5].

[5] *https://www.ibo.org/programmes/career-related-programme/curriculum/the-career-related-studies/*

"The world has fundamentally transformed in the wake of COVID-19 and the rapid integration of AI into daily life. These seismic shifts call for a reimagining of education—one that prepares students not only for university, but also for the complex, evolving world of work. The IB Career-related Programme (IBCP) is uniquely positioned to meet this dual need by equipping today's learners with future-ready knowledge and industry-aligned skills.

With over 40 schools across India currently offering the IBCP—and strong interest from many more—this number is expected to double over the next two years. Students are already engaging with career-related studies in areas such as Artificial Intelligence, Business Administration, Sports Management, and Sustainability, alongside IB's academic and reflective core.

For universities, this signals a growing pipeline of applicants who are not only academically prepared, but also globally aware, professionally oriented, and ready to thrive in interdisciplinary environments."

Mahesh Balakrishnan
Senior Manager, IB South Asia

Growth of Career-Focused Subjects in Cambridge International Schools

The Cambridge curriculum offers a range of industry-relevant subjects at both the Grade 10 (IGCSE) and Grade 12 (AS & A Level) levels, designed to equip students with practical skills and sector-specific knowledge. At the IGCSE level, subjects such as Enterprise, Travel and Tourism, ICT, Computer Science, Design and Technology, Food and Nutrition, and Agriculture provide early exposure to real-world applications.

At the AS & A Level stage, offerings like Business, Travel and Tourism, Information Technology, Computer Science, Media Studies, Design and Technology, Accounting, and Economics help prepare students for higher education and career pathways in diverse fields including technology, hospitality, media, finance, and entrepreneurship.

Increasing number of students are opting for subjects like Business Studies and Computer Science both in IGCSE and A Level, in addition to core academic subjects.

Cambridge International AS & A Level Global Perspectives and Research is a skills-based course that prepares learners for positive engagement with the rapidly changing world. Exam entries (March 2025 series) also show an increased focus on developing future-ready skills, with Cambridge IGCSE Global Perspectives experiencing a remarkable 24% rise in entries[6].

[6] *https://www.cambridgeinternational.org/news/news-details/view/cambridge-announces-results-of-its-largest-ever-march-series-held-in-india-20250520/*

Expanding Access to Education

Bridging Educational Gaps Through Open and Distance Education for Diverse Learners

The National Institute of Open Schooling in the Indian K–12 Landscape

The National Institute of Open Schooling (NIOS) is an autonomous institution under the Ministry of Education, Government of India. It provides education through the Open and Distance Learning (ODL) mode and offers Secondary and Senior Secondary level courses, along with various vocational and life-enrichment programs. NIOS caters to a diverse group of learners, particularly those who are unable to attend traditional schools due to various social, economic, or personal reasons. It is also useful in catering to students who are actively involved in sports or performing arts, participating at highly competitive levels and for students who would like to pace out their learning.

NIOS was established in 1989 by the Ministry of Education (formerly Ministry of Human Resource Development) as an initiative to promote inclusive education.

NIOS's enrollment data shows a continuous increase in student numbers, with the current enrollment of 0.529 Million during 2023-24 and a cumulative enrollment of 23.56 lakhs in the last five years. NIOS has seen an annual growth of about 14% in its total enrollment. NIOS offers a wide range of vocational courses, attracting a large number of students seeking skills development in various areas.

The Vocational Education Department offers more than 80 courses in areas like Health and Para-Medical, Engineering, Home Science, Computer and IT, Agriculture, and Business. NIOS offers a unique On-Demand-Examination System (ODES), which allows students to take exams whenever they are ready.

Scheme of Subjects for Class 10 and 12

Course	Subjects Offered	Scheme of Subjects
Secondary (Class 9 and 10)	**Group-A** Hindi, English, Bengali, Marathi, Telugu, Urdu, Gujarati, Kannada, Sanskrit, Punjabi, Assamese, Nepali, Malayalam, Odia, Arabic, Persian, Tamil, Sindhi **Group-B** Mathematics, Science and Technology, Social Science, Economics, Business Studies), Home Science, Data Entry Operation, Psychology, Indian Culture & Heritage, Painting, Accountancy, Hindustani Music, Carnatic Sangeet Indian Knowledge Tradition Veda Adhyan, Sanskrit Vyakaran, Bharatiya Darshan, Sanskrit Sahitya	• Minimum five subjects with at least one language or at most two languages. • Two additional subjects can also be taken.
Senior Secondary (Class 11 and 12)	**Group-A** Hindi, English, Bangla, Tamil, Odia, Urdu, Gujarati, Sanskrit, Punjabi **Group-B** Mathematics, Home Science, Psychology, Geography, Economics, Business Studies, Painting, Data entry Operation Indian Knowledge Tradition Veda Adhyan, Sanskrit Vyakaran, Bharatiya Darshan, Sanskrit Sahitya **Group-C** Physics, History, Library and Information Sc., Environmental Science **Group-D** Chemistry, Political Science, Mass Communication, Military Studies **Group-E** Biology, Accountancy, Introduction to Law, Military History **Group-F** Computer Science, Sociology, Tourism, Physical Education, and Yoga	• Minimum five subjects with at least one language or at most two languages. • Learner can opt only one subject from each of Group C,D,E and F

Vocational Education in NIOS

NIOS offers vocational education programmes at the school level, keeping in view the needs of the target groups. Currently, around 100 programmes are offered in the broad areas of Agriculture and Animal Husbandry, Business and Commerce, Computer and Information Technology, Engineering and Technology, Health and Paramedical, Home Science and Hospitality, Teacher Training, etc.

Students can do certificate courses, diploma courses, stand-alone certificate courses, integrated academic and vocational programmes (secondary and senior secondary), and vocational streams by opting for vocational courses through NIOS.

The vocational courses are industry driven based upon National Occupational Standards (NOS) in the sectors shown below:

Agriculture and Animal Husbandry

Business and Commerce

Computer and Information Technology

Health and Paramedical

Engineering and Technology

Home Science and Hospitality

Yoga and Naturopathy

Growth of NIOS Over the Years

In the last 5 years up to 2022, NIOS has seen enrollments of 4.13 million students in India. NIOS saw a drop in enrollments in its vocational and academic courses in 2020 during the COVID-19 pandemic and lockdown, but has now started to return to its previous level with around 0.5 million students enrolled in 2022.

The most popular secondary course subjects in NIOS, in descending order, are English, Hindi, Social Science, Painting, Science & Technology, Mathematics, Data Entry Operations, Home Science, Business Studies, and Economics. The most popular Senior Secondary course subjects in NIOS, in descending order, are English, Hindi, Physics, Chemistry, Data Entry Operations, Political Science, Painting, Biology, History, Home Science, and Business Studies.

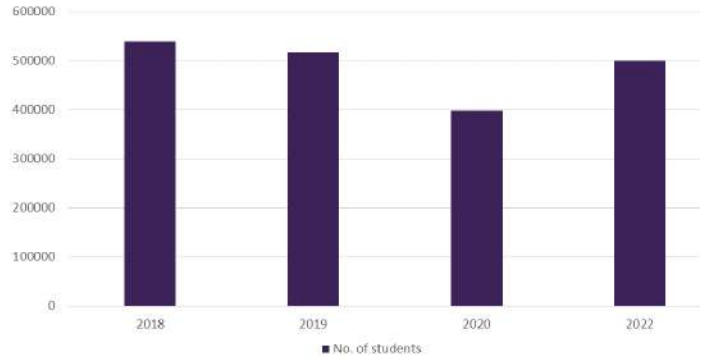

Figure 12 : Year-wise total enrollment of NIOS students (academic + vocational) (Source: NIOS Statistics)

Recognition and Accreditation

NIOS has been accredited by the Association of Indian Universities (AIU) for the purpose of admission to higher courses of study at Indian universities since 1991. The equivalence granted by AIU allows NIOS certificates to be recognized for higher education and employment purposes across India. NIOS certificates are also recognized by other bodies like the University Grants Commission and prominent universities within India.

NIOS students are also permitted to apply for national-level medical and engineering entrance examinations. While NIOS is primarily India-focused, some foreign universities accept its certificates, especially when supported by standardized test scores (like SAT/ACT/IELTS).

Often misunderstood as a fallback option for dropouts or low-performing students, the National Institute of Open Schooling (NIOS) is, in fact, a forward-looking, government-recognized system designed to democratize access to quality education. With its flexible structure, on-demand assessments, and diverse subject offerings, NIOS supports a wide and growing spectrum of learners- including working adolescents, students with disabilities, athletes, performers, homeschoolers, and those in rural or remote areas. It enables high-potential students who require non-traditional schedules or learning environments to excel on their own terms. Far from being a second-tier alternative, NIOS is a vital equalizer in India's K–12 education landscape-championing both access and equity.

State Boards at a Glance

In addition to national and international boards, India's K–12 education landscape includes a network of state education boards, each operating within its respective state jurisdiction. Among these, the Uttar Pradesh Madhyamik Shiksha Parishad (UPMSP) is the largest state board in India, overseeing approximately 136,800 schools. It is followed by the state boards of Madhya Pradesh (92,516 schools) and Rajasthan (68,822 schools). The Maharashtra State Board of Secondary and Higher Secondary Education (MSBSHSE) ranks fourth, with 65,523 affiliated schools. This section and the next provide a comprehensive details of the two major state boards- Uttar Pradesh and Maharashtra- in terms of scale, enrollment trends, and inclination towards international higher education.

Uttar Pradesh

Explore Tradition and Transition in India's largest state board Education System

An Overview of the Uttar Pradesh State Board of Education

The UP Board has historically catered to one of the largest student populations in India, governing over 136,800 schools. However, recent trends suggest a decline in student participation, particularly in the Class 10 and Class 12 board examinations. The number of students appearing for Class 10 exams had been on a steady decline since 2017, saw a temporary recovery in 2021, but dropped again the following year.

Similarly, for Class 12, the total number of examinees fell from 2,917,268 in 2016 to 2,571,002 in 2023—a noticeable decline over the seven-year period. This trend is partly attributed to growing competition from national boards, as well as the increasing presence of international curricula, particularly in urban and semi-urban areas of Uttar Pradesh. Factors such as perceived improved quality of education, flexible curriculum design, exposure to global skills, and better higher education pathways offered by these boards are influencing students and parents to shift away from traditional state board education. Having said this, there is still a sizable population of students that universities need to continue tapping into.

The Uttar Pradesh Board (UPMSP) is often regarded as one of the most rigorous and academically challenging state boards in India. This perception is reflected in the comparative pass percentages between UPMSP and national boards such as CBSE. In recent years, CBSE has consistently reported higher pass percentages at both the Class 10 and Class 12 levels compared to the UP Board. These differences in outcomes highlight the relative difficulty of examinations conducted by the UP Board, as well as possible disparities in assessment patterns, curriculum design, and student support systems.

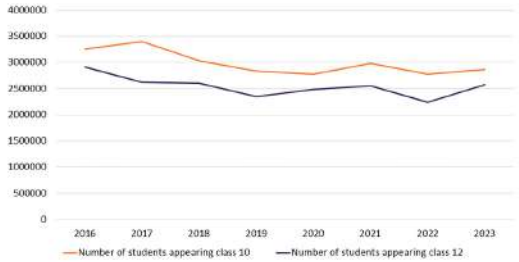

Figure 13 : Number of students who have appeared for UP State Board Class 10 and 12 Exams from 2016 to 2023 (Source: UP State Board website[7])

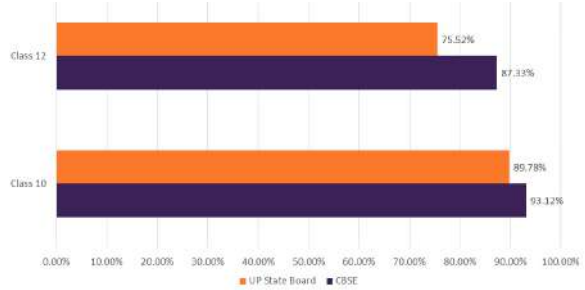

Figure 14 : Pass percentage of UP State Board and CBSE for class 10 and 12 exams in 2022-23 (Source: CBSE and UP State Board website)

The Class 10 examinations are typically conducted in February–March, and students can choose to write their exams in either Hindi or English. The exam structure generally comprises 70 marks for theory and 30 marks for internal assessments and practical examinations.

[7] *Uttar Pradesh Madhyamik Shiksha Parishad (UPMSP). (n.d.). Uttar Pradesh Madhyamik Shiksha Parishad (UPMSP) official website. Retrieved April 23, 2025*

Curriculum Structure and Subject Preferences – Class 10

Students are required to take five compulsory subjects for Class 10 under UP Board:

- Hindi
- English
- Mathematics
- Science
- Social Science

In addition, students must choose one optional subject spanning across additional languages and vocational disciplines. In line with the National Education Policy (NEP) 2020, UPMSP has announced a major reform to the Class 9 and 10 curriculum, increasing the number of examinable subjects from six to ten.

The new structure includes compulsory subjects in Mathematics, Science, and Social Science. Students must choose three language subjects, including Hindi (compulsory) and two others from options like Sanskrit, Urdu, Tamil, and more. One elective subject is selected from fields such as Home Science, Anthropology, Commerce, NCC, Computer Science, Agriculture, or Environmental Science. For creative development, students pick one Art Education subject—either Painting or Music (Vocal/Instrumental). Physical and moral development is supported through one Physical & Health Education subject like Yoga, Moral Studies, Sports, or SUPW. Additionally, students choose one Vocational Education subject from a diverse set of 31 options.

Curriculum Structure and Subject Preferences - Class 12

For the 2024 Class 12 examinations, 2,577,997 students registered, with boys accounting for 55.4% of candidates. Biology emerged as the most preferred subject in the Science stream, with enrollment twice that of Mathematics, which saw a notable decline from the previous year. This shift may reflect changes in post-COVID career aspirations, including interest in life sciences and medical-related fields.

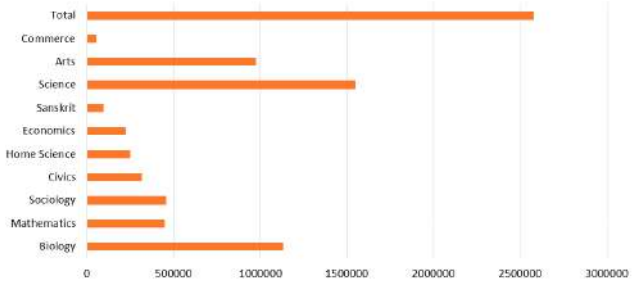

Figure 15 : Subject-wise distribution of the number of students who have appeared for Class 12 exams in 2024 under UP State Board (Source: UP State Board website)

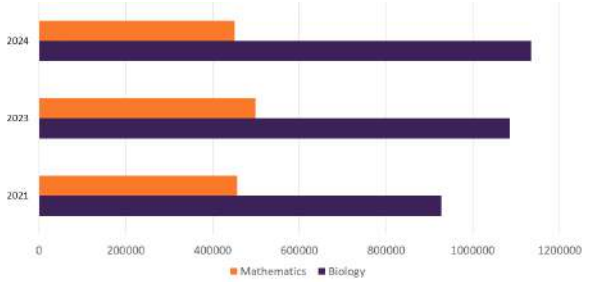

Figure 16 : Number of students who have appeared for Biology and Mathematics class 12 exams under UP State Board from 2021 to 2024 (Source: UP State Board website)

Among the Arts stream subjects, Sociology was the most preferred in 2024, with 458,333 students registering for the examination. Other popular choices included Civics, Home Science, and Economics, reflecting sustained interest in social sciences and humanities.

Maharastra

Step Into Maharashtra’s Diverse and Dynamic Learning Landscape

An Overview of the Maharashtra State Board of Education

The Maharashtra State Board of Secondary and Higher Secondary Education (MSBSHSE) has experienced a modest decline in Class 10 board exam enrollment, from 1,601,406 students in 2016 to 1,529,096 in 2023. However, in contrast to trends observed in states like Uttar Pradesh, the number of students appearing for Class 12 board exams has increased from 1.38 million in 2016 to 1.42 million in 2023.

This indicates that the influence of national or international boards has been relatively limited at the senior secondary level (Classes 11 and 12) in Maharashtra. The state's strong school infrastructure, affordability, public trust in the board's curriculum, and alignment with regional higher education pathways likely contribute to the sustained participation in the Maharashtra State Board at the higher secondary stage.

An analysis of pass percentage data since 2016 reveals that the Maharashtra State Board consistently records higher pass rates than CBSE for both Class 10 and Class 12 examinations. This trend is particularly pronounced at the Class 12 level, where the pass percentage for Maharashtra State Board is significantly higher than that of CBSE across all observed years, indicating that the Maharashtra State Board is probably easier compared to CBSE. These consistently strong outcomes potentially reflect the robustness of the state's assessment framework, and may also indicate effective exam preparedness and support systems within Maharashtra's school ecosystem.

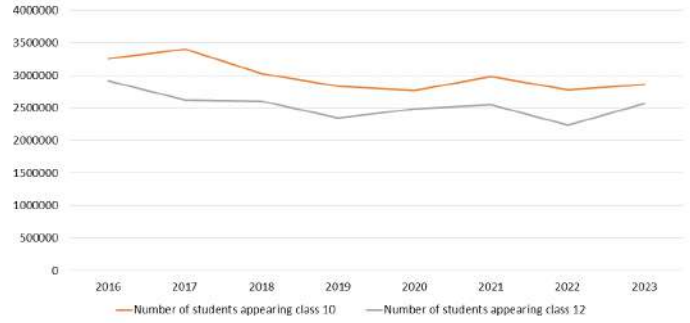

Figure 17 : Number of students who have appeared for Maharashtra State Board Class 10 and 12 Exams from 2016 to 2023 (Source: Maharashtra State Board website[8])

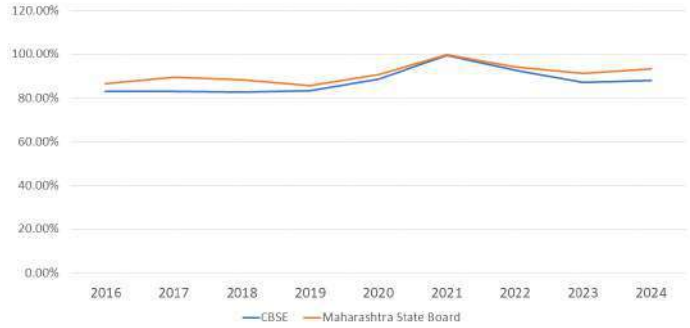

Figure 18 : Year-wise trend of pass percentage of class 12 students under Maharashtra State Board and CBSE from 2016 to 2024 (Source: CBSE and Maharashtra State Board website)

8 *Maharashtra State Board of Secondary and Higher Secondary Education. (n.d.). Official website. Retrieved April 23, 2025*

Curriculum Structure and Subject Preferences – Class 10

The Maharashtra State Board of Secondary and Higher Secondary Education (MSBSHSE) conducts the Class 10 board examinations, known as the Secondary School Certificate (SSC) Exams, typically between February and March. Students are required to appear for six subjects, each carrying 100 marks (final exam carrying 80 marks and internal assessments carrying 20 marks):

- English
- Mathematics
- Science
- Social Science
- Language 1 (Commonly-Marathi)
- Language 2 (Commonly-Hindi)

The Board adheres to the three-language formula as outlined by the National Education Policy (NEP) 2020, with English as a mandatory component.

Curriculum Structure and Subject Preferences – Class 12

For Classes 11 and 12, the Maharashtra Board offers four distinct academic streams:

General

Science

Arts (Humanities)

Commerce

English remains a compulsory and the most opted subject across all streams, followed by Marathi, which holds the position of the second most registered language.

Among the streams, Science is the most preferred, with Physics emerging as the top subject in Class 12 (2024)—141,468 students registered for the Physics exam, closely followed by Chemistry. In the social sciences, Geography attracted the highest enrolment with 96,369 students, followed by Economics (91,358 students) and Political Science, which continues to grow in popularity. Among the language subjects, Hindi saw 51,594 registrations, making it the most preferred additional language after English (compulsory) and Marathi.

These patterns reflect a diverse subject preference across disciplines, indicating a strong regional emphasis on multilingualism and scientific education.

Among the vocational and technical subjects offered across streams by the Maharashtra State Board, Information Technology (IT) stands out as the most popular choice, with 50,253 students registered for the 2024 Class 12 board exam. Other subjects that have garnered notable interest include Computer Science, Agricultural Science & Technology, Crop Science, and Electronics, indicating a growing alignment with applied science fields.

These trends suggest that while there is growing student interest in select technical fields, many vocational courses have yet to gain traction, possibly due to limited awareness, lack of infrastructure, unclear career pathways post-completion, or hindrance to university admissions for vocational subjects. Addressing these gaps through targeted career counseling, industry linkage, and practical exposure could significantly improve uptake of under-enrolled vocational streams.

Within the vocational and applied subjects, Information Technology (IT) has experienced the highest increase in student registrations for the Class 12 board examinations between 2022 and 2024, reflecting a growing interest in digital skills and career-oriented technical education. Computer Science has also seen a comparable rise, further underscoring students' alignment with technology-driven disciplines.

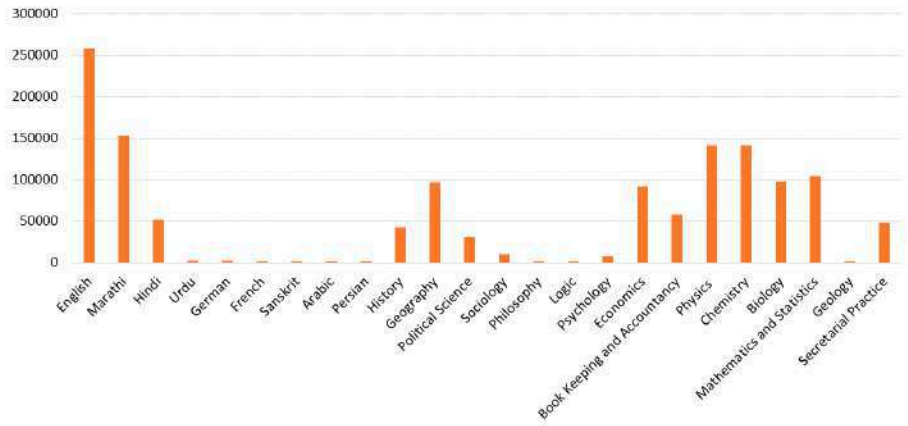

Figure 19 : Number of students registered for various subjects in 2024 for class 12 under the Maharashtra State Board (Source: Maharashtra State Board website)

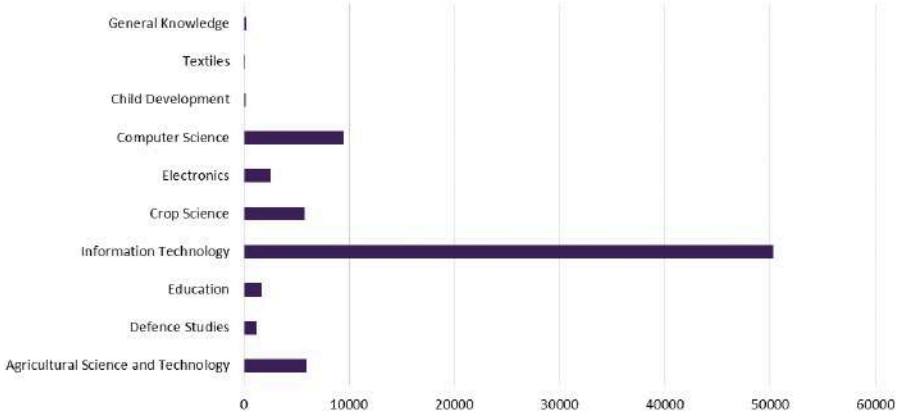

Figure 20 : Number of students registered for various vocational and other subjects in 2024 for class 12 under the Maharashtra State Board (Source: Maharashtra State Board website)

Inclusive Education in India

Towards Educational Equity: The Impact and Challenges of EWS Quota Implementation

Understanding EWS Reservations in Schools

In 2019, the Government of India introduced a 10% reservation quota in government employment and educational institutions for individuals belonging to the Economically Weaker Section (EWS) of the general category. This reservation is in addition to the existing 50% quota for Scheduled Castes (SC), Scheduled Tribes (ST), and Other Backward Classes (OBC), thereby increasing the total reserved seats beyond the traditional cap.

Between 2018–19 and 2022–23, over 22.7 million EWS students were enrolled in private schools across India under this provision. In a significant ruling in August 2024, the Supreme Court of India mandated that all private schools, regardless of their proximity to government or government-aided schools, must reserve 25% of their seats for students from economically weaker sections and disadvantaged backgrounds.

To determine EWS eligibility, the Government of India has outlined the following criteria:

- The family must not belong to SC, ST, or OBC categories.
- The annual household income must not exceed ₹0.8 million.
- The family must own less than five acres of agricultural land.
- The residential flat must be under 1,000 square feet in area.
- The residential plot must be under 100 square yards in a notified municipality or 200 square yards in a non-notified area.
- The family must not own a motorized vehicle.

As per the 2022–23 data, Uttar Pradesh had the highest number of EWS-designated seats in educational institutions, with 1.75 million seats, followed by Maharashtra at 1.167 million seats. From utilization point of view, Madhya Pradesh recorded the highest enrollment under the EWS quota, with over 5.3 million students over the period of 2018 to 2023, followed by Rajasthan with 3.81 million and Karnataka with 2.397 million students.

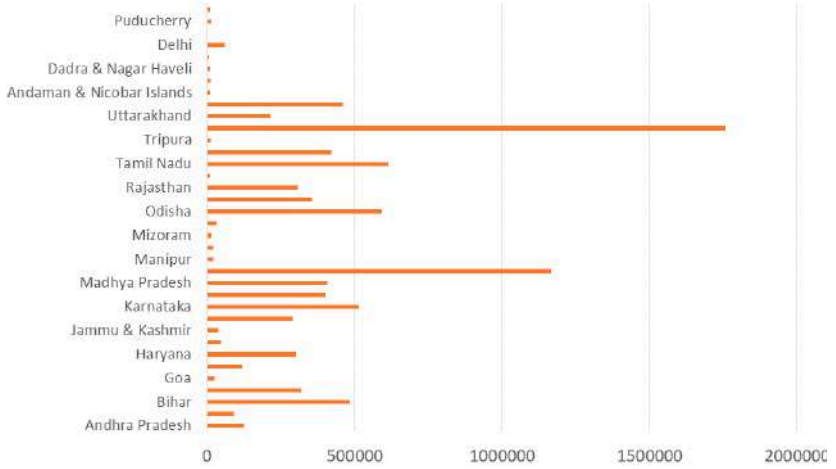

Figure 21 : No. of EWS seats in all Indian educational institutions across states in 2022-23 (Source: Education For All in India[9])

EWS Seat Utilization Across Indian States

Between 2018–19 and 2022–23, Madhya Pradesh led EWS quota enrollment with over 5.3 million students, followed by Rajasthan (3.81 million) and Karnataka (2.397 million). In 2022–23, Uttar Pradesh had the highest number of EWS-designated seats (1.75 million), followed by Maharashtra (1.167 million). Actual utilization data shows Uttar Pradesh filled 1.23 million seats and Maharashtra 1.1 million, narrowing the gap. Maharashtra and Kerala reported the highest utilization rates at 95%, while Goa, Mizoram, Nagaland, Sikkim, Tamil Nadu, and West Bengal each exceeded 90%. Conversely, Assam, Jammu & Kashmir, and Uttar Pradesh had the lowest proportions of filled seats, highlighting challenges in implementation. State-level data limitations hinder full assessment of the scheme's effectiveness.

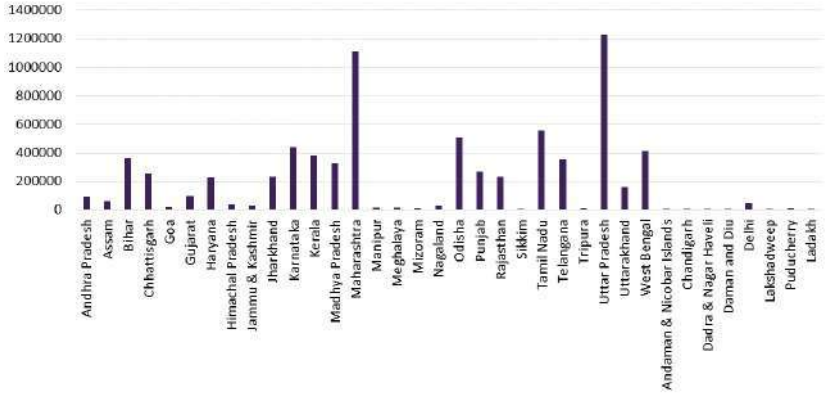

Figure 22 : Number EWS seats filled up in Indian states in educational institutions in 2022-23 (Source: Education For All in India)

[9] *Education for All in India. (n.d.). Education for All in India. Retrieved April 23, 2025*

Nepal

A Rapidly Diversifying K–12 Landscape Balancing National Reforms with Global Aspirations

Introduction to K12 Education Landscape in Nepal

Nepal's education system has undergone significant transformation since 1951, when the country began moving away from an absolute monarchy. Before this period, education was limited to the elite, with a literacy rate of only 5% and no universities.

Nepal follows a formal education system divided into:

- Basic Education (Grades 1–8): Free and compulsory for public schools
- Secondary Education (Grades 9–12): Includes general and technical streams
- Higher Education: Offered by 10 universities and over 1,400 colleges and campuses

Some key reforms include the 1971 National Education System Plan which established a modern, centralized structure. The 2016 School Sector Development Plan aimed to improve access and quality, aligning with Nepal's goal of economic development. As of 2016, Nepal has 35,222 schools nationwide.

The country has made significant progress in expanding access to education, particularly in increasing female participation. However, challenges such as high dropout rates, gender disparities, and low tertiary enrollment persist.

Nepal has a total of 35,876 schools, 14 Central Universities, 6 Provincial Universities and 8 Autonomous Institutions (Deemed Universities) with over 1,400 colleges, as of 2024 data.

According to recent reports, the share of private schools in Nepal jumped from 19% in 2015 to around 23% in 2024. The share of students in Nepal's private schools is over 30%.

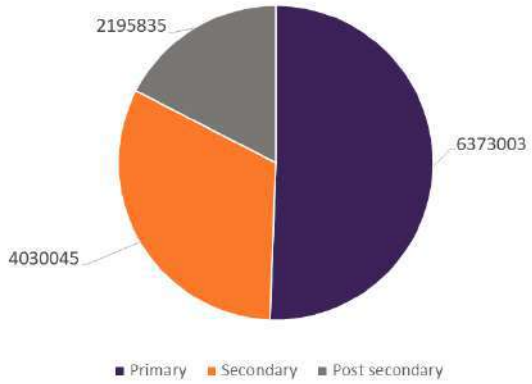

Figure 23 : Number of students enrolled in various education levels in Nepal in 2022 (Source: Ministry of Education, Science, and Technology, Nepal[10])

Male and Female School Education Rates across Levels in Nepal as of 2022		
Education Level	Male Completion Rate	Female Completion Rate
Primary School	81%	83%
Lower Secondary School	71%	75%
Upper Secondary School	27%	28%

[10] *Ministry of Education, Science and Technology. (n.d.). Ministry of Education, Science and Technology (MoEST) official website. Retrieved April 23, 2025*

Curriculum

The education system in Nepal is governed by the National Examination Board (NEB), with an increasing number of schools offering Cambridge International (25 in total), International Baccalaureate (IB) (7 schools), and other global curricula like CBSE (16 schools), reflecting a growing demand for international education. With English-medium instruction becoming increasingly prevalent, students and parents are actively seeking global academic opportunities from an early stage.

The National Examinations Board organizes Higher Secondary (Classes 10 and 12) examinations, also known as the Secondary Education Examination (SEE; Grade 10 Finals) and School Leaving Certificate Examination (SLC; Grade 12 Finals). NEB has replaced the old Higher Secondary Education Board (HSEB), popularly called 10+2 education. Under NEB, secondary education in Nepal follows a unified four-year system (grades 9–12), with a final national exam at Grade 12. Private school enrollment is growing and pass rates in private schools (90% in 2015) far exceed those in public schools (34% in 2015).

The Grade 10 exam is usually scheduled in March. The exam consists of 8 subjects:

Subject Category	Subjects / Options
Compulsory Subjects	English, Nepali, Mathematics, Science and Technology, Social Studies, Health, Population, and Environment Education
Optional Subjects (Choose Two)	Optional Mathematics, Computer Science, Accountancy, Economics, Environmental, Science, Sociology, Various languages (e.g., Newari, Urdu, Sanskrit)

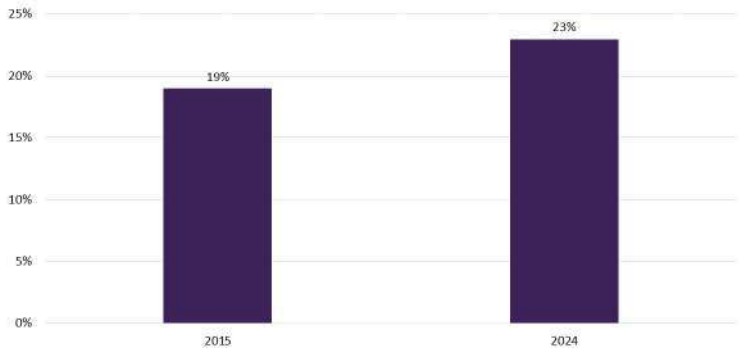

Figure 24 : Percentage share of private schools in Nepal in 2015 and 2024 (Source: Kathmandu Post[11])

[11] *Ghimire, B. (2025, January 1). Exemplary public schools. The Kathmandu Post.*

After Grade 10, students choose an academic stream—such as Science, Management, Humanities, or Law—based on their interests, academic performance, and personal or family circumstances. This transition is often accompanied by a change in school or location, particularly for students from rural areas moving to urban centers for Grades 11 and 12.

In Nepal, under the National Examination Board (NEB), students in Grade 12 are required to take examinations in six subjects. This includes three compulsory subjects and three optional subjects. This structure allows students to tailor their education to their interests and career aspirations, promoting a more holistic and practical learning experience. Availability of subjects will differ from school o school depending on their resources.

Some institutions offer both the National Education Board (NEB) curriculum and international curricula such as the Cambridge Assessment International Education (CAIE) A-Levels, as well as NEB and International Baccalaureate (IB) programs.

The CAIE A-Level curriculum in Nepal aligns with international standards. To qualify for national university admission, students must complete three full-credit and one half-credit subject, as per government regulations. Regardless of curriculum—public, private, or international—all students must take the Grade 10 Secondary Education Examination (SEE) conducted by the NEB.

Hence, even IB schools implement the NEB Grade 10 curriculum after MYP (Grades 6–9), before transitioning to the IBDP for Grades 11–12. This centralized SEE exam is a national benchmark for academic progression.

Over 20 schools in Kathmandu offer A-Levels. Students usually take five subjects, including at least one half-credit course, combining Science, Non-Science, or both. Exams are held in May–June or October–November, beginning with AS-Level and followed by A2-Level.

Category	Subjects
Compulsory Subjects	English, Nepali, Mathematics or Social Studies (choose one)
Optional Subjects:	Students select three optional subjects based on their interests and future academic or career plans. These optional subjects span various fields, including:
Science & Technology	Physics, Chemistry, Biology, Computer Science
Management & Business	Accounting, Economics, Business Studies, Marketing, Business Mathematics
Humanities & Social Sciences:	Sociology, Psychology, Political Science, History, Geography
Law & Education	General Law, Procedural Law, Child Development and Learning, Instructional Pedagogy and Evaluation
Vocational & Technical Education	Hotel Management, Travel & Tourism, Agriculture, Food & Nutrition, Environmental Education
Arts & Culture	Dance, Music, Sculpture, Painting, Applied Arts
Languages	Maithili, Newari, Hindi, French, Japanese, Urdu, German

International Mobility

According to statistics from the NOC Department[12], a substantial number of Nepali students are choosing Japan as their preferred study destination. In 2024 alone, over 35,000 students were granted a No Objection Certificate (NOC) to study in Japan, positioning Nepal as the second-largest source of international students in the country after China. Despite a rise in tuition fees implemented in 2024, Japan continues to attract Nepali students due to its affordable living expenses, cultural affinity, and high-quality educational institutions.

The steady influx of students reflects Japan's enduring appeal among Nepali youth seeking quality education in a culturally respectful environment. However, many young Nepali students prefer Japan as a destination to study the language and take up small jobs in the country.

[12] *Khadka, R. (2025, January 1). 339,000 individuals obtain NOC in four years. myRepublica.*

Australia

Once a leading destination for Nepali students, experienced a sharp decline in student visa approvals in 2024. The number of visas issued to Nepali nationals dropped from 23,000 in 2023 to approximately 11,000 in 2024. This significant decrease is largely attributed to Australia's stricter immigration regulations, increased visa application costs, and a policy shift emphasizing university education over vocational education pathways. Additionally, a high rate of visa rejections has sparked concerns among students and educational consultancies in Nepal. Nonetheless, Australia remains a valued destination for globally recognized university degrees and continues to appeal particularly to students interested in Vocational Education and Training (VET) programs.

Canada

Canada remains highly competitive and prominent in attracting Nepali students. In 2023, nearly 16,000 Nepali students obtained Canadian study permits, accounting for more than 3% of the total permits issued that year. The number of Nepali students studying in Canada had tripled from 2022 to 2023, reflecting robust growth across academic levels.

The United States

The United States witnessed a significant surge in student mobility from Nepal during the 2024 academic cycle. Between October 2023 and June 2024, approximately 9,200 F-1 student visas were granted to Nepali students. Furthermore, 11,261 NOCs were issued for U.S. studies during the same period, marking a substantial increase from the previous year. This upward trend underscores the growing aspiration of Nepali students to pursue higher education in the U.S., driven by its diverse academic offerings, prestigious institutions, and post-graduation work opportunities. The U.S. continues to hold strong appeal at both undergraduate and graduate levels, cementing its status as a top study-abroad destination.

The United Kingdom

The United Kingdom also reported an unprecedented rise in the number of Nepali students in recent years. In the year ending June 2024, the UK issued over 432,000 sponsored student visas globally, with Nepal emerging as the sixth-largest contributor. A total of 13,339 Nepali students were granted UK visas, marking a significant year-on-year increase. The UK's world-renowned academic institutions, coupled with the Graduate Route Visa, which allows international students to work for up to two years after graduation, have significantly enhanced its attractiveness. In fact, the UK is now perceived as the most sought-after and frequently applied-to destination for Nepali students in 2024.

Special Mention

We acknowledge the contribution of Kshitiz Dahal and Madhav Neupane in providing us first-hand information and insights of this section on K-12 education in Nepal.

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Bangladesh

Shifting Towards Global Classrooms: The Student Mobility Surge in Bangladesh

Introduction to K12 Education Landscape in Bangladesh

Bangladesh's K-12 education system is vast and rapidly evolving, comprising government-run schools, private institutions, madrasas, and a growing number of English-medium and international schools. Bangladesh has district-level boards (11 in total) of intermediate and secondary education to manage its education system and conduct the Secondary School Certificate (SSC) for 10th and Higher Secondary Certificate (HSC) for 12th. There are two additional alternative education boards: Bangladesh Madrasah Education Board and Bangladesh Technical Education Board. At the same time, an increasing number of students are opting for British curricula (O-Level/A-Level), IB programs, and Edexcel curriculum, reflecting a strong demand for global education.

Curriculum

Bangladesh offers its students the option to choose their respective streams from class 9 onwards - Science, Arts, or Business Studies. A student appearing for the Class 10 exam or the SSC examination has to sit for 10 subjects, including three compulsory papers.

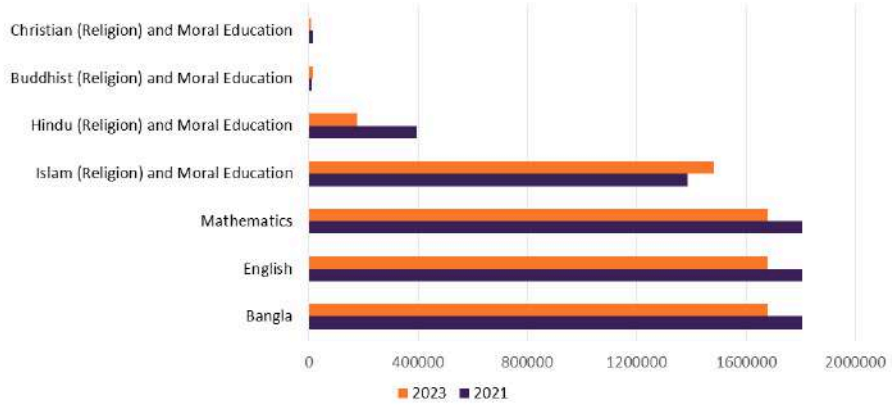

Figure 25 : Number of students in compulsory subjects appearing for Class 10 Exams in Bangladesh in 2021 and 2023 (Source: Bangladesh Education Statistics[13])

Subject Category	Subject Name / Options
Compulsory Subjects	1. Bangla 2. English 3. Mathematics
4th Subject (Religion- Choose 1)	Islam and Moral Education, Hindu and Moral Education, Buddhist and Moral Education, Christian and Moral Education
Elective Subjects (Choose any 6)	Science stream includes Physics, Chemistry, Biology, Higher Math, Information and Technology, Agriculture Studies, Home Science Humanities stream includes Geography, Civic and Citizenship, Economics, History of Bangladesh, Sociology Business Studies stream includes Finance and Banking, Accounting, Business Ent., General Science, Information and Technology

13 *Bangladesh Bureau of Educational Information and Statistics (BANBEIS). (2024). Bangladesh Education Statistics 2023. Ministry of Education, Government of the People's Republic of Bangladesh.*

The number of students appearing for Class 10 examination in Bangladesh has seen a decline between 2021 and 2023, as shown in the figure above. In terms of the various streams, Humanities attracts the highest number of students while Commerce, or Business Studies, is the least preferred stream.

The number of students opting for both Humanities and Commerce has declined from 2021 to 2023 while it has increased for Science in the same time period.

Among the various stream-based optional subjects, Information and Communication Technology is an important subject for students in Class 10. Among the subjects in Arts, Civics and Citizenship, Economics, Geography and Environment, and History were mandatory in 2021.

The number of students opting for Geography and Environment and History declined significantly in 2023.

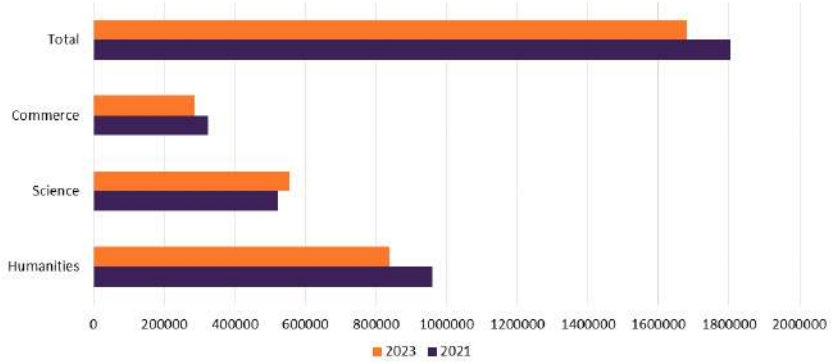

Figure 26 : Number of students enrolled in various streams for class 10 exams in Bangladesh in 2021 and 2023 (Source: Bangladesh Education Statistics)

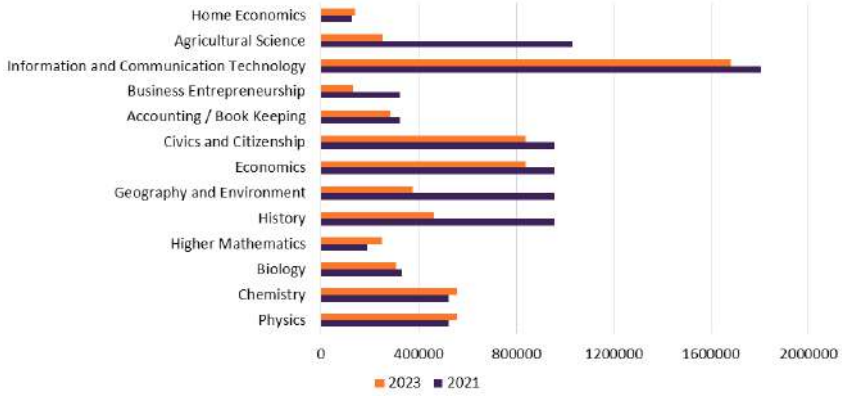

Figure 27 : Number of students in other subjects appearing for Class 10 Exams in Bangladesh in 2021 and 2023 (Source: Bangladesh Education Statistics)

For Class 12, the number of students enrolled has increased from 2,514,001 students in 2021 to 2,624,694 students in 2023.

Arts continues to be the most popular stream for Class 12 students in Bangladesh. However, all three streams have seen an increase in the number of students in the same time period.

Students generally study 6 or 7 subjects in Classes 11 and 12. These include compulsory subjects like Bangla, English, and Information & Communication Technology, along with 3 to 4 subjects chosen based on their group (science, humanities, or business studies).

Each group has specific subjects in addition to the core subjects.

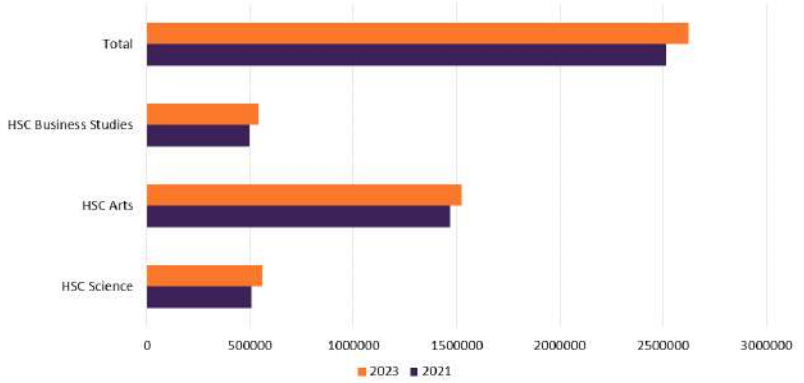

Figure 28 : Number of students enrolled in various streams for class 12 exams in Bangladesh in 2021 and 2023 (Source: Bangladesh Education Statistics)

International Curriculum

International schools use a variety of curricula in Bangladesh - IB, Cambridge IGCSE, and Edexcel. English medium schools in the country mostly follow these curricula. English-medium schools have existed since the British period and more English schools offering various international qualifications were being introduced by the foreign nationals after the creation of Bangladesh. Unlike many other developing countries, Bangladesh lacks low-fee English-medium schools. While low-cost private schools do exist, they use Bengali as the medium of instruction. It has been reported that the Bangladesh government is more concerned with maximizing coverage and the promotion of education for all, rather than with any particular kind of education (religious or otherwise) to be provided by private institutions.

English-medium schools in Bangladesh are more expensive than Bengali-medium ones, yet increasingly preferred by parents. This trend is linked to the global dominance of English and parents' desire for bilingual proficiency[14]. Other studies highlight the perceived advantages of English-medium education—better academic opportunities and greater social mobility—as key motivators.

As of 2020, Bangladesh had approximately 350 registered English medium schools under the Ministry of Education, with an estimated 250,000 students enrolled. In addition, around 500 unregistered English medium schools were operating, alongside approximately 2,000 English medium kindergartens serving over 450,000 students. These schools typically follow international curricula such as Cambridge, Edexcel, or the IB. The total number of students in English medium education is believed to exceed 700,000, highlighting a significant and growing segment within the country's K–12 education landscape.

[14] *Hayden, M., & Thompson, J. (2008). International schools: Growth and influence. UNESCO International Institute for Educational Planning.*

International Mobility

Studies have found that those who have studied under English-medium education have higher chances of applying to and attending universities abroad. Bangladesh has also seen a rise in enrolments to the US, driven by favourable visa policies and post-study work opportunities, while regional options like Malaysia and China gained traction.

Between 2022 and 2024, the United States, United Kingdom, and Canada remained the top destinations for Bangladeshi students pursuing higher education abroad. With an year-on-year increase, Bangladesh has positioned itself as the 8th largest source of international students in the US. The UK and Canada followed closely, while regional destinations like Malaysia and Japan gain more popularity.

There has also been a growing demand for European countries such as Denmark, Hungary, Malta, Finland, and France as of 2024. Countries such as Germany, Australia, and India, continue to remain popular choices, reflecting the diversifying preferences of Bangladeshi students seeking quality education and better career prospects abroad.

This surge is fueled by rising aspirations, broader access to digital information, and stronger support systems including international school counsellor's and education platforms. English-medium instruction in urban centers like Dhaka has improved language proficiency, while university outreach through virtual sessions, school partnerships, and education fairs has increased awareness and engagement[15].

With a large youth population and a growing appetite for quality education, Bangladesh is set to remain a major contributor to global student mobility in the years ahead.

Acknowledgement

We acknowledge the contribution of Md. Hasin Ishrak in providing us first-hand information and insights of this section on K-12 education in Bangladesh.

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[15] *https://www.thedailystar.net/rising-stars/news/why-studying-abroad-becoming-harder-bangladeshi-students-3834336?utm_source=chatgpt.com*

From the Counsellor's Desk

Voices of Indian High School counsellor's on Student Trends & University Engagement

As Indian students grow more global and discerning, counsellors have become strategic guides. Here, four experienced counsellor's share insights on evolving student preferences and what international universities need to know to connect effectively.

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Are Students Still Chasing the Usual Favorites — or Are New Destinations Rising?

Ajay- While the U.S. and U.K. continue to be popular choices owing to their strong academic reputation and global alumni networks, there's a noticeable shift in student interest toward a broader range of study destinations. Countries like the Netherlands, Ireland, Germany, and Australia have now become well-established alternatives. Additionally, emerging options such as Hong Kong, Japan, and European nations like Italy and Spain are gaining momentum — particularly for their niche academic offerings, affordability, and cultural resonance.

Today's students are more willing than ever to explore non-traditional paths that align better with their academic aspirations, financial constraints, and lifestyle preferences. In 2025, emerging destinations across India, wider Europe, and parts of Asia are clearly standing out- either for their cost-effectiveness, ease of access, or as strategic backup choices in an increasingly competitive admissions landscape. Record-breaking application numbers are not unusual anymore, especially for ambitious students who want to keep all doors open.

- High application volumes still focused on the US, UK, and India
- More students including Europe or Asia in their mix
- Combos like "US + India + Europe" or "UK + Asia + Australia", creating application strategies that hedge risks and maximize options

Praseeja- The U.S. and U.K. continue to be the leading destinations of choice for students, even amid ongoing geopolitical tensions and interestingly Australia has gained significant traction recently. At Stonehill, 55% of the cohort applied to U.S. institutions, 45% to the U.K., and notably, 32% to Australia - a sharp rise from just 2% last year. For the first time, Australia has entered the top three preferred destinations for our students.

Saritha- Over the years, having guided students through their college application process, I've seen a consistent preference among families from Hyderabad and other cities for undergraduate study in the USA and UK. Often, this choice is influenced by personal factors- citizenship, family already settled abroad, or a long-held familiarity with these destinations.
But in recent years, especially post-COVID, we find priorities shifting. More students are exploring options beyond the traditional path. Countries like Singapore and parts of Europe are gaining traction. This year alone, we've seen a noticeable rise in applications to Singapore, despite its rigorous selection process.

Charushilla- Many students still focus on the US and UK, but there's renewed interest in Singapore and Hong Kong- especially for STEM fields like AI, Data Science, and even Psychology. Emerging favorites also include Spain, France, and Italy for strong business schools, plus the Netherlands for sustainability-focused liberal arts students.
It's empowering to have choices, but with choices comes confusion.

Despite counsellor advice that leans towards sharpening the college list, researching well and making the most of the high school years, increased uncertainty and complete lack of control on how geopolitical frameworks might dictate future, students and families definitely want a plan A, B and often a C or D.

What Should Universities Do to Connect Better with Today's Students?

Ajay- In today's landscape, being authentic, responsive, and data-aware is key. Students are informed and discerning- they value real insights over polished marketing. Showcase student experiences, career outcomes, and clear information about affordability, scholarships, and work opportunities. Keep in mind that students are applying across multiple regions; to stand out, highlight what makes your institution practical and supportive- not just prestigious. Digital engagement should be interactive and culturally attuned, and representatives should be ready to address regional nuances directly. Remember, students are making deeply personal, high-stakes decisions- your ability to connect empathetically and inform transparently will make all the difference.

Praseeja- As a counsellor engaging with international universities regularly, my advice is clear: Build long-term relationships with schools and be open to experimenting with MOUs and on-the-spot offer sessions. Offer school-wide scholarships and come prepared to engage deeply about student life. Train your representatives to understand the school curriculum and provide customized support. Prioritize one-on-one meetings with counsellor's over large university fairs. Focus your conversations on campus life, career prospects, and how degrees translate into jobs. Highlight student support services and ensure you offer strong guidance once students accept offers

Saritha- International universities should recognize school counsellor's not merely as recommenders or administrators, but as strategic partners who deeply understand each student's unique journey and actively help shape it. Meaningful engagement with counsellor's is essential for building trust, tailoring support, and guiding students toward the best-fit opportunities. Investing time in this partnership drives better outcomes for both students and universities.

Charushilla- University reps should invest in building strong relationships with independent counsellor's- they become powerful brand advocates trusted by parents for their deep, nuanced guidance. In India, where referrals drive decisions, trust is key and takes time to build. Universities must adopt a long-term, at least three-year, approach focused on meaningful, organic engagement- not quick wins- to succeed.

What Matters Most to Students When Choosing Universities Today?

Ajay- There's a notable shift in priorities. While rankings and reputation still matter, students are now equally- if not more- focused on return on investment, employability, mental health support, and the overall student experience. Affordability, post-study work rights, and the ability to immigrate or remain in the country post-graduation weigh heavily in the decision-making process. Social issues like campus inclusivity, sustainability, and safety are also becoming increasingly important to Gen Z applicants. Flexibility in curriculum and hybrid learning options have gained prominence too.

Praseeja- Students today are well-informed and connected, valuing peer feedback over university claims. Social media and authentic engagement remain key- students can easily spot genuine value versus marketing hype. They now scrutinize course offerings closely, seeking flexibility and accelerated options. While parents focus on accessibility, location, and safety, students prioritize understanding the "day in the life" at campus, often assessing if the university truly fits their vibe.

Saritha- Today's students are better informed. Thanks to internships, shadowing, and summer programs, they have real exposure to industries and career paths early on. They're asking sharper questions- not just about rankings or reputation, but about long-term relevance, return on investment (ROI), and personal fit. Students now want to understand how their education will remain relevant in 10 years.

Indian students today are global citizens with focused goals. They are seeking meaningful, flexible, and outcome-driven education. School counsellor's, in turn, are rising to meet this moment with a holistic and strategic guidance approach. For universities, the opportunity lies in deepening engagement, offering transparency, and truly understanding what drives this new generation.

Conclusion and Recommendations for Universities

The K–12 education ecosystem across India, Nepal, and Bangladesh is experiencing a dynamic and policy-driven transformation that is redefining how students learn, explore careers, and pursue higher education opportunities. This shift is largely fueled by national education reforms—such as India's National Education Policy (NEP) 2020, Nepal's School Sector Development Plan, and Bangladesh's expanded focus on global curricula—and is characterized by growing flexibility, inclusivity, and career alignment. One of the most striking developments is the surge in vocational and interdisciplinary subject uptake across the region. In India, vocational education has grown substantially, with subjects like Information Technology, Artificial Intelligence, Tourism, Business, Yoga, and Wellness now offered to millions of students through CBSE, NIOS, and state boards. The International Baccalaureate's Career-related Programme (IBCP) and Cambridge International's career-focused subjects have also gained traction, blending academic rigor with practical, real-world skills that are aligned with global industry needs. As a result, students are increasingly able to design their own non-linear learning journeys- making choices for their curriculums, emphasizing on experiential learning and practical application of theory, community engagement and more depending on their interests and aspirations.

Simultaneously, schools are adapting to the demands of a more globally aware, digitally connected, and career-focused student body by offering multiple curricula under one roof to meet student diversity. This pluralistic model allows institutions to cater to students from diverse socio-economic backgrounds, learning needs and academic trajectories, with the background of more families prioritising flexible learning models, international recognition, and career outcomes. The rise in international mobility further underscores this trend: students from these regions are not just targeting traditional destinations like the U.S. and U.K., they are also looking at countries like Australia, Canada, the Netherlands, Japan, and emerging parts of Europe and Asia. Their decisions are increasingly shaped by considerations beyond academic reputation—such as return on investment, mental health support, employability, cultural fit, and access to internships and global learning opportunities.

For international universities, this evolving landscape demands a more agile, culturally nuanced, and long-term approach. Institutions must not only recognize non-traditional qualifications such as vocational subjects and open schooling credentials but also deepen engagement with students early in their academic journey—often starting at the school level. Establishing strong partnerships with counsellor's, offering targeted scholarships, showcasing career outcomes, and investing in local trust-building initiatives can significantly strengthen their relevance and appeal. Furthermore, understanding regional disparities in curriculum and access, and adapting outreach strategies accordingly, will be essential in connecting authentically with students and parents.

Ultimately, the K–12 ecosystems in India, Nepal, and Bangladesh present a complex yet vibrant opportunity for global universities—not just to attract applicants, but to become co-creators of a more inclusive, skill-oriented, and future-ready global education model. As students across South Asia increasingly craft customized, globally conscious learning paths, international institutions that respond with empathy, innovation, and long-term commitment will be best positioned to engage this next generation of learners and changemakers.

Recommendations for Universities

Enhance Early Awareness of Vocational and Alternative Pathways

With students now selecting subjects as early as Grade 6, and key academic decisions solidifying by Grade 9, universities must recalibrate their outreach timeline. While vocational education is expanding, awareness around its long-term value remains low. Many students explore subjects like Performing Arts or Physical Education in Grades 9–10 but drop them by Grade 11 due to limited visibility of future academic or career prospects. Universities can bridge this gap by offering targeted early engagement—webinars, alumni panels, and career sessions featuring real-life outcomes—to help students see viable higher education trajectories in these fields. Improved awareness at this stage can encourage continuity and informed subject selection through senior secondary levels.

Recognize and Adapt to Multiple Academic Pathways

International universities must broaden their admissions frameworks to recognize the diversity of academic routes in South Asia, including alternative, new age qualifications such as NIOS, IBCP, and vocational subjects like AI, Entrepreneurship, and IT. Students with such qualifications are often well-suited for global undergraduate study but remain underserved due to limited institutional awareness or rigid entry criteria. Institutions should develop and publicly share clear equivalency policies for state board qualifications and allow for interdisciplinary subject combinations and flexible prerequisites. Doing so will open access to a broader, more diverse, and globally capable applicant pool.

Promote Alternative Assessment Pathways

To increase access for students from vocational and non-traditional academic backgrounds, universities should expand the adoption of alternative assessment methods such as portfolios, interviews, or skill demonstrations. These approaches allow institutions to evaluate practical competencies and interdisciplinary strengths not always captured by grades. Especially relevant for students from NIOS, IBCP, or vocational tracks, such pathways reflect a commitment to holistic admissions and greater inclusivity.

Bridge Traditional Subjects with Emerging Careers

Given the continued popularity of traditional academic streams, universities should design career counseling initiatives that link these disciplines to modern, interdisciplinary, and future-ready careers.Illustrate how core disciplines like Economics, Sociology, and Languages lead to careers in public policy, diplomacy, research or tech-driven sectors. Help students see the long-term utility of their academic choices.

Design Language Programmes with Career Integration

The increasing popularity of international languages reflects that language courses should go beyond cultural enrichment to offer tangible career benefits. Universities can attract South Asian students by offering language programmes tied to professional outcomes in translation, diplomacy, international business, global education, environmental ethics, sustainable food systems, and compassion-based leadership.

Culturally Responsive Outreach and Advising

Universities should tailor their outreach strategies to regional educational patterns and aspirations. Providing multilingual information materials (can be very useful for parent generation as an important stakeholder), virtual counselling, and country-specific admissions support can increase student confidence and application success rates.

Empower counsellor's, Deepen Understanding of School Context

Build sustained, trust-based relationships with school counsellor's by first developing a nuanced understanding of each school's academic environment—its curricula, subject trends, student aspirations, and cultural context. counsellor's are key influencers in students' higher education journeys; empowering them with tailored resources, regular updates, and collaborative planning enhances outreach effectiveness. This deeper engagement enables universities to co-create relevant fairs, workshops, and sessions that reflect the real needs and goals of each school community

Customize need-based and expand scholarship funds and routes

Universities should develop India- and South Asia-specific need-based financial aid models and targeted scholarships that consider regional income disparities and social mobility challenges to increase access for EWS students. Flexible fee structures during the education journey on one hand and to build long term capacity on the other hand, explore building dual-degree and twinning programs, which can become attractive and more affordable models. Collaboration with banks, CSR-driven organizations, and international education bodies will further enhance access and support. These strategies will promote diversity, inclusivity, and equitable access to global education aligned with India's inclusive policies.

Leverage Technology and Social Media for Scalable Engagement

To connect with South Asia's digital-native students, universities should use AI chatbots, WhatsApp newsletters, and immersive virtual tools for early, consistent engagement. Platforms like Instagram, YouTube, and LinkedIn can amplify authentic student stories, campus life, and application guidance. Virtual tours, live Q&As, and interactive webinars make outreach accessible across regions and grade levels—building trust, awareness, and long-term interest at scale.

In a region where education is both aspiration and empowerment, international universities must move beyond episodic recruitment to sustained presence and meaningful partnership. South Asia's classrooms are not just talent pools—they are the launchpads of global change-makers. Institutions that engage early, inclusively, authentically and insightfully will be best positioned to lead the future of international education.

ABOUT ACUMEN

Acumen is committed to helping globally — ambitious universities and broader education service providers enter, explore, and expand in South Asia, Southeast Asia, and beyond.

Acumen offers a dedicated range of services to drive student recruitment and enrolment; develop strategic partnerships; and deliver consulting based on individual partner needs. As a result, Acumen acts as an extension of your brand, connecting you with students, unlocking strategic international education opportunities understanding your ideal market through research and insights, and helping to mitigate risks along the way.

We have developed robust partnerships with stakeholders across the globe, including government agencies in Australia, Canada, India, Ireland and New Zealand, as well as US International Trade Administration, the US Department of Commerce and the UK Department of International Trade.

We operate in over 20 countries, with more than 250 industry practitioners with deep local knowledge and global expertise. We help our partners navigate a competitive education landscape from end to end, while always prioritising their success.

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