

# Global Education Monitoring Report on non-state actors

---

Summary & implications for the  
Global Schools Forum community



# The GEM Report

Non-state education is the central theme of the latest [UNESCO Global Education Monitoring \(GEM\) Report 2021/22](#), published in December 2021.

The report provides a global picture of non-state actors in education, highlights some of the key issues facing the sector, and recommends ways in which the non-state sector may be harnessed to improve global education.



## Overview of non-state education sector

**The non-state sector forms a significant part of global education provision.** *"Put simply, without non-state actors, the education of 350 million more children would fall to the responsibility of the state"* (p.xiv). Most non-state schools are single-proprietor schools, emerging in response to shortfalls in government provision and parental concerns over the quality of public schooling.

**State and non-state actors in education cannot be clearly distinguished.** Non-state actors are involved in education in many different ways, varying by service type as well as by ownership, management, and financing models. There is also a relatively small number of countries which have public-private partnerships for education (p.68). *"Far from a simple public vs private dichotomy, there is a variety of non-state school types"* (p. 19).

### Enrolment in non-state schools has grown.

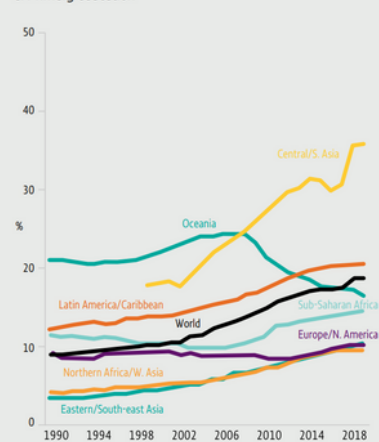
*"The share of private institutions worldwide increased by 7 percentage points in about 10 years, from 10% in 2002 to 17% in 2013 in primary education and from 19% in 2004 to 26% in 2014 in secondary education but has since remained roughly constant"* (p.29).

**Non-state actors are especially present in early childhood, technical, tertiary and adult education.** However, there remain unknowns about the full scale and state of non-state education, due to data gaps and the blurred boundaries between state and non-state provision.

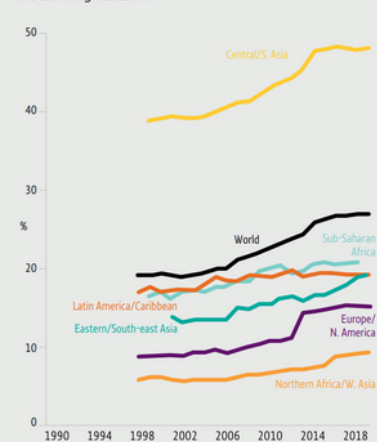
#### Private enrolment shares are highest in Southern Asia

Percentage of enrolment in private institutions, by education level, 1990–2019

a. Primary education



b. Secondary education



Source: UIS database.

**Without non-state actors, the education of 350 million more children would fall to the responsibility of the state**

# Key issues across state & non-state education sectors

## Equity

Ensuring equitable access to education remains a sector-wide challenge. Public education is often not free, and families face significant burdens and tough choices when it comes to funding education.

Globally, one in six families saves to pay school fees; about 8% of households borrow to pay for education, rising to 12% in low-income countries (p.91). The result is that *“many public education systems fail to prevent stratification and segregation”*(p.xiv).

## Quality

No one type of education provider delivers better quality than another. Schools do not necessarily improve when they compete, and some characteristics of non-state schools can give a skewed impression of better quality, eg, through selection criteria. Additionally, quality often does not always inform school choice: parents rarely have sufficient information about quality, and instead choose schools based on religious beliefs, convenience, and student demographic characteristics.

## Regulation

There is consensus that non-state education should be regulated, however countries tend to have low capacity for regulating key areas of this sector. Almost all countries regulate non-state school standards through school inspections, yet regulations are least likely to focus on quality or equity compared with other indicators like registration, approval or licensing, or teacher certification (p.xv).

## Financing

Governments vary in their decisions whether and how to fund non-state providers. In most countries, there is some sort of government funding available for non-state provision, whether through per-student or parent subsidies, school loans or gifts, or support for teacher and operational costs (p.66). Meanwhile, the use of aid for funding private education is actively debated (p.104-5).



**Globally, one in six families saves to pay school fees; about 8% of households borrow to pay for education, rising to 12% in low-income countries**



# Summary of report recommendations

## Equitable access to education

*“Fulfil the commitment to make 1 year of pre-primary and 12 years of primary and secondary education free – but publicly financed need not mean publicly provided if equity can be ensured.”*

## Quality assurance

*“Establish quality standards that apply to all state and non-state education institutions.”*

## Effective & feasible regulation

*“Establish common monitoring and support processes that apply to all state and non-state education institutions.”*

## Environment for nurturing innovation

*“Facilitate the spread of innovation through the education system for the common good.”*

## Representation of all stakeholder voices

*“Maintain the transparency and integrity of the public education policy process so as to block vested interests.” (pp.20-4)*

**Establish quality standards that apply to all state and non-state education institutions**

## Our response to the GEM Report

Overall, GSF believes that the GEM report brings a constructive new tone to the previously simplistic and unhelpful public-versus-private framing that has characterised education debates: the report urges governments to view *“all education institutions, students and teachers as part of a single system”* (p.2).

In doing so, it encourages the more useful question of how non-state provision can be harnessed to boost education outcomes and quality in an equitable way.

### Equitable access to education

We agree that it is critical to mobilise public financing to help ensure that quality education is available to all. Whilst the current public funding shortfall persists, there needs to be short-term action to ensure that poorest children have access to quality schools in contexts where this is currently financed through household spending and school fees. This could include cash transfers for low-income households, or public-private partnerships to remove costs for the poorest pupils attending non-state schools.

We do not support the report’s finding that *“profit making is inconsistent with the commitment to guarantee free pre-primary, primary and secondary education”* (p.21). There are many examples of fee-free education services provided by for-profit providers, with such services often financed by subsidies from governments.

### Quality assurance

Teachers are one of the most important inputs in education. Teachers should be good quality and well paid, however quality standards should give providers (state or non-state) the freedom to choose the best person and best salary to deliver quality education, and be regulated based on outcomes, not inputs.

### Regulation

We agree with the headline take-away that effective regulation can help to improve both quality and equity in education. There is a need for governments to develop system-wide regulatory systems that are proportionate, transparent to parents, and focused on learning outcomes. However, it is important to ensure that regulation is not so narrow that it homogenises education provision.

The international community should help provide the support needed by governments to establish effective regulation, including funding technical assistance and strengthening the educational planning guidance on engagement with, and regulation of, non-state provision.

### Environment for nurturing innovation

We welcome the recognition in the report of the potential for collaboration between the state and non-state sectors to maximise innovation system-wide. The non-state sector can provide an effective space for new ideas to be trialled and tested, with the potential for the most successful and impactful innovations to be scaled up and expanded into the wider education system.

### Representation of all stakeholder voices

We support the recommendation that “*all actors should have a genuine seat at the table*” (p.24), however changes are required to the governance of international education to realise this. There is a need for recognition of, and transparent engagement with, non-state actors and their representative organisations at an international and national level.



Photo courtesy: Luminos Fund

## The view from the GSF community

On 10 February 2022, Global Schools Forum hosted an online roundtable discussion to discuss the implications of the GEM Report to their work.

Non-state actors in our membership and across our wider community **support the shift towards viewing state and non-state actors as part of a single system.** Such a perspective encourages collaborative, pragmatic approaches that more accurately reflect the education landscape.

**The work of our members highlights the critical role that non-state actors play in education provision,** not only in low-resource, crisis- and conflict-affected contexts such as Afghanistan and Democratic Republic of Congo, but also across other settings. In Lagos, for example, non-state actors account for 90% of education provision, while for-profit organisations can be useful providers when offering government-subsidised education which is free at point of use.

**Given these important roles, our community calls for effective, outcomes-driven regulation** that applies appropriately to state and non-state sectors. Too often, regulation is not applied consistently across all operators, yet equitable governance is essential for creating high-quality, collaborative education systems.

Our community reminds us that high-level policy recommendations are often several layers removed from education settings on the ground, and that education provision does not exist in a silo.

**We must therefore contextualise universal recommendations to make them appropriate for individual settings,** and as ever, must centre the student and parent in decisions about how best to deliver equitable, quality education.



## About Global Schools Forum

**Global Schools Forum (GSF) is a catalytic community working to improve education outcomes at scale.**

We do this by supporting social enterprises in education through:

- Curated learning and networking opportunities
- Funding and coaching to scale innovations in partnership with government
- Generating evidence
- Strategic policy engagement

**Our network is currently 66 members strong**, each working in partnership with communities and governments in 51 countries. Our secretariat – spread across 4 continents – has expertise in school leadership, education innovation, and education financing. Our vision is that all children in low and middle-income countries have equitable and safe access to quality education so they can realise their potential.

### Our Supporters



### Questions?

If you have questions about this briefing, please write to [info@globalschoolsforum.org](mailto:info@globalschoolsforum.org).

