GLOBAL RESEARCH REPORT · 2026

The Global Open Schooling Report

India's $1.3 Billion Opportunity

How the world is reimagining where, when, and how children learn — and what it means for India.

3.93M	$1.3B+	2.3x
Open schooling learners, India 2026	Projected India market by 2031	Market Growth by 2031

PREPARED BY WONK OPEN SCHOOLING RESEARCH

openschooling.wonkapp.com/

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CEO's Message

Vidhu Goyal

Chief Executive Officer
WONK

PROACE EDU VENTURES LLP

THIS REPORT IN ONE LINE

The first rigorous sizing of India's open-schooling market — $557M today, $1.3B by 2031.

> ***"When we finally ran the numbers ourselves, the size of this opportunity surprised even us: India's open-schooling market — including a global-curriculum segment nobody had sized before — is on track to cross $1.3 billion within five years."***

Every year, millions of families quietly make a decision that would have seemed unthinkable a generation ago: they choose not to send their child to a conventional school. At WONK, we call this movement "open schooling," and this report began as an attempt to understand it. It became something more the day we asked a harder question: what is this market actually worth, and to whom?

No government body or analyst firm had published a rigorous answer for India, so we built one ourselves — directly from NIOS's own Annual Report and Academic Prospectus, Ministry of Education exam data, and Cambridge International's own disclosed figures. We found three distinct segments hiding inside one category: NIOS, the State Open Schools that operate entirely independently of it, and a fast-growing population of Indian students pursuing Cambridge and Edexcel qualifications as private candidates — a segment that, to our knowledge, has never been quantified before. Together, they point to a market of $557 million today, growing toward $1.3 billion by 2031.

India sits at the centre of this story, with the world's largest open schooling system and a National Education Policy that explicitly calls for it to be "expanded and strengthened." Every figure in this report is sourced and every assumption disclosed — because a number this size deserves to be checked, not just believed.

This is our contribution to that conversation — not as a vendor pitching a product, but as practitioners who have taught tens of thousands of hours of 1:1 lessons and are now putting a number on the market we work in every day.

Vidhu Goyal

Vidhu Goyal
CEO, WONK | ProAce Edu Ventures LLP

EXECUTIVE SUMMARY

Open Schooling Has Reached a Global Tipping Point

Open schooling — once a fallback for families the mainstream system couldn't serve — is now a first choice for a fast-growing, global population of families choosing flexibility, pace, and personalised instruction. Our own research — the first attempt, to our knowledge, to size this market rigorously — puts a number on this shift: **WONK Research projects India's combined open-schooling market (NIOS, State Open Schools, and Indian students pursuing global curricula through Cambridge/Edexcel private candidature) will grow from $557M to $1.3 billion in five years, as the learner base grows from 3.93 million to 4.69 million.** This report explains why, and what it means for the decade ahead.

0.1 WONK RESEARCH: INDIA'S TOTAL OPEN-SCHOOLING OPPORTUNITY, 2026–2031

LEARNERS, 2026 → 2031

3.93M → 4.69M

NIOS + State Open Schools + Global Open Schooling.

MARKET VALUE, 2026 → 2031

$557M → $1.3B

WONK Research base case, three segments combined.

COMPETITIVE POSITION

Early Mover

WONK is among the first providers built specifically for this white space.

LEARNERS — 2026

- **99.8%** Indian Open Schooling
- **0.2%** Global Open Schooling

VALUE — 2026

- **81.3%** Indian Open Schooling
- **18.7%** Global Open Schooling

LEARNERS — 2031

- **99.3%** Indian Open Schooling
- **0.7%** Global Open Schooling

VALUE — 2031

- **53.8%** Indian Open Schooling
- **46.2%** Global Open Schooling

Source: WONK Research, built on NIOS's own Annual Report 2022–23 and Academic Prospectus 2025–26, Ministry of Education exam-results data, and Cambridge International's disclosed India figures. Full three-segment model, methodology, and every assumption disclosed in Chapter 7.

WONK RESEARCH FINDING

Global Open Schooling holds a small fraction of learners but already generates nearly a fifth of total market value in 2026 — and by 2031, that share rises to nearly half. NIOS's 3.5% learner CAGR is grounded in its own realised admissions data (2019-20 to 2023-24), applied conservatively given the scale it has already reached; State Open Schools are assumed to track the same rate. Global Open Schooling's 28% learner CAGR reflects the low base this newly-quantified segment starts from, informed by interviews with MAS Advisory's international K-12 education experts on comparable growth trajectories in similar markets. The result: India's open-schooling market grows steadily in volume, while its global-curriculum segment grows disproportionately in value.

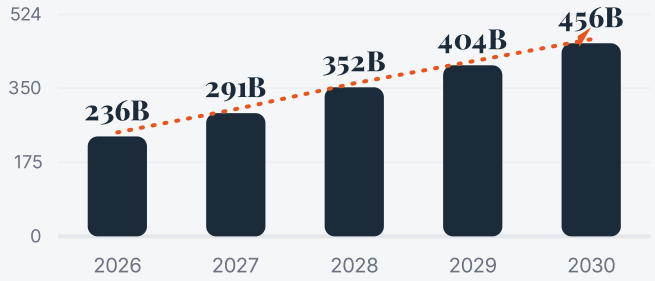
OUR CORE THESIS

Open schooling is transitioning from a system of last resort to a system of first choice for a meaningfully sized, fast-growing segment of globally-minded families — and the providers who combine curriculum credibility, human mentorship, and AI-personalised instruction will define the next decade of the category.

0.2 THE GLOBAL BACKDROP

Three forces are driving this shift worldwide: a pandemic that gave over a billion families a forced trial of remote learning; structural dissatisfaction with rigid, one-pace, exam-first schooling; and — most consequential for the next decade — artificial intelligence, which has made genuinely personalised, always-available tutoring affordable for the first time. The global EdTech market itself is on a clear growth trajectory, from an estimated $236 billion in 2026 to a projected $456 billion by 2030.

GLOBAL EDTECH MARKET (USD B) ▲ 17.9% CAGR



Within it, the AI-in-education segment is growing far faster still — every major analyst estimate points to AI-powered personalisation as the fastest-growing part of the category worldwide.

Source: WONK Research.

What This Report Covers

- The historical evolution of open schooling from correspondence courses to AI-personalised platforms.
- A landscape view of the major global systems — NIOS, US virtual charter schools, UK independent online schools, Australian distance education, and homeschooling ecosystems.
- Market trends, growth drivers, and the genuine challenges the sector must still solve.
- Case studies from six countries illustrating different models of open schooling in practice.
- India's specific opportunity — market sizing, key players, and student/parent profiling — and a strategic roadmap for capturing it responsibly.

KEY INSIGHTS

Eight Findings That Define the Category

Drawn from global research and WONK's own tutoring data — the patterns that matter most for where open schooling goes next.

A first choice, not a fallback

Families increasingly choose open schooling proactively — for flexibility, pace, and fit.

World's largest open school

NIOS: 23.56 lakh (2.36M) cumulative learners, 2019-24, across 11,000+ study centres.

AI is closing the old weak point

AI-supported tutoring roughly doubles learning gains vs. standard classroom instruction.

Homeschooling growth is durable

US homeschooling grew ~5% in 2024–25 — nearly 3x the pre-pandemic pace, and holding.

Dropout is falling, but retention still lags

Secondary (9–10) dropout has fallen to 8.2% (2024–25), yet only 47.2% of students reach the end of higher secondary.

Policy now pulls it mainstream

NEP 2020 commits to expanding NIOS, aiming to re-engage ~2 crore out-of-school children.

Capital is consolidating around AI

AI-in-education is growing far faster than broader EdTech, even as overall sector funding cools.

Credentialing is the real constraint

Not devices or content — trust in the credential is the leading barrier to growth.

Open schooling in practice: every learner finds their own mix of academics, creative pursuits, and community.

SECTION 1

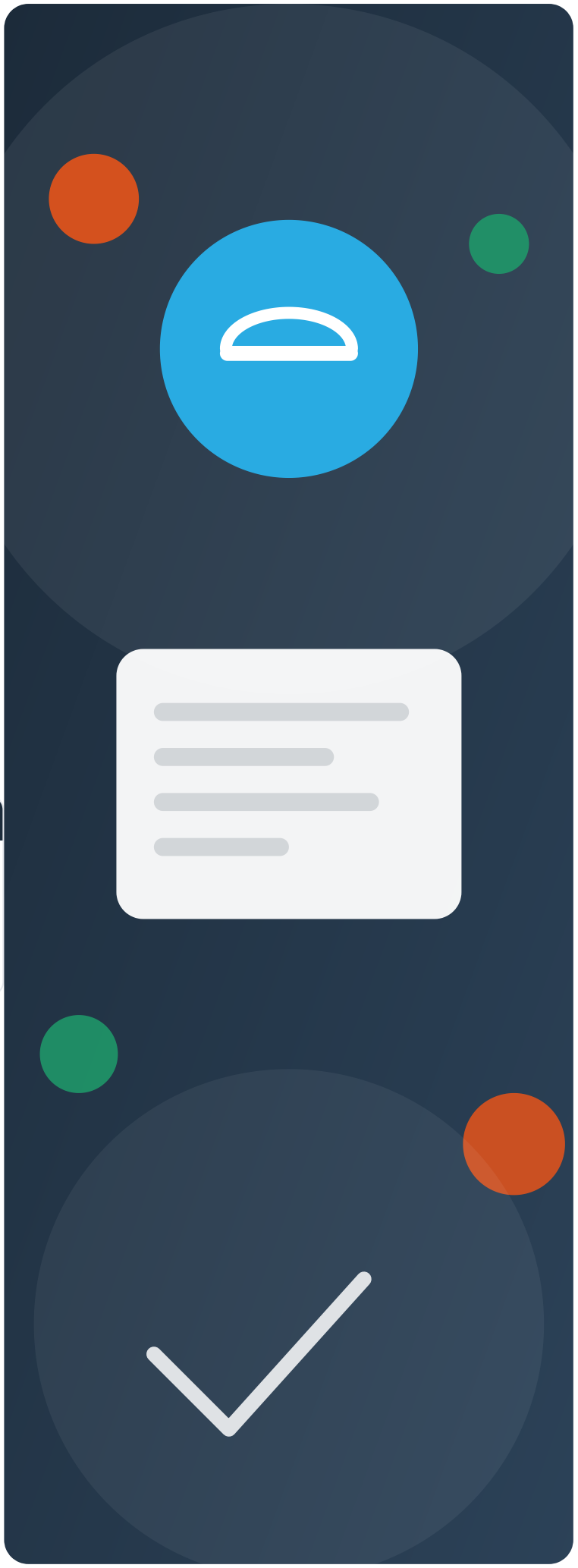
The Global Evolution of Open Schooling

From pedal-radio correspondence courses in the 1920s outback to AI-personalised platforms today — how open schooling became a global category.

WONK RESEARCH INSIGHT

1989 the year India's National Open School (now NIOS) was formally established out of a decade-old CBSE pilot.

Source: NIOS Institutional Records



CHAPTER 1

The Global Evolution of Open Schooling

Open schooling did not begin with the internet. Its roots lie in early-20th-century correspondence education — printed lessons mailed to isolated learners, from Australian outback cattle stations reached by pedal-powered radio in the 1920s, to distance courses run by state education departments for children of travelling communities. The underlying idea has always been the same: a school-quality education should not depend on a child's ability to physically show up at a building every day.

Three Waves of Growth

Wave 1 — Analogue (pre-1990s)

Radio lessons, postal correspondence, and national open schools built to reach remote or disadvantaged populations. India's own system traces here: a 1979 CBSE pilot was formalised into the National Open School in 1989.

Wave 2 — Digital, Asynchronous (1990s–2019)

CD-ROMs, early LMS platforms, and the first fully online K-12 schools. Florida Virtual School (1997) was among the first statewide public online schools anywhere, growing steadily for two decades — real, but niche.

Wave 3 — AI-Personalised (2020–)

Two shocks in quick succession: a pandemic forcing over a billion students into remote learning almost overnight, and generative AI making live, adaptive, one-to-one instruction available at a fraction of historical cost.

WHY THIS WAVE IS DIFFERENT

Unlike earlier growth spurts driven by necessity or crisis, this wave is increasingly driven by preference — parents actively choosing pace, curriculum, and mentorship quality once they've seen a credible alternative work.

Timeline: Milestones in Open Schooling

PERIOD	MILESTONE
1920s	Pedal radio enables Australia's earliest remote "School of the Air" correspondence model.
1979–89	CBSE's Open School pilot is formalised into India's National Open School (later NIOS).
1997	Florida Virtual School launches as one of the world's first statewide online public schools.
2000s	K12 Inc. (now Stride) and Connections Academy scale full-time virtual charter schooling across the US.
2020	COVID-19 forces over a billion students into remote learning; UK's Oak National Academy launches within weeks.
2020	NEP 2020 commits India to expanding and strengthening NIOS and State Open Schools.
2023–24	Generative AI tutors (e.g. Khanmigo) go from small pilots to hundreds of thousands of active users within a year.
2025–26	Post-pandemic homeschooling growth proves durable; AI-in-education market crosses $10B.

SECTION 2

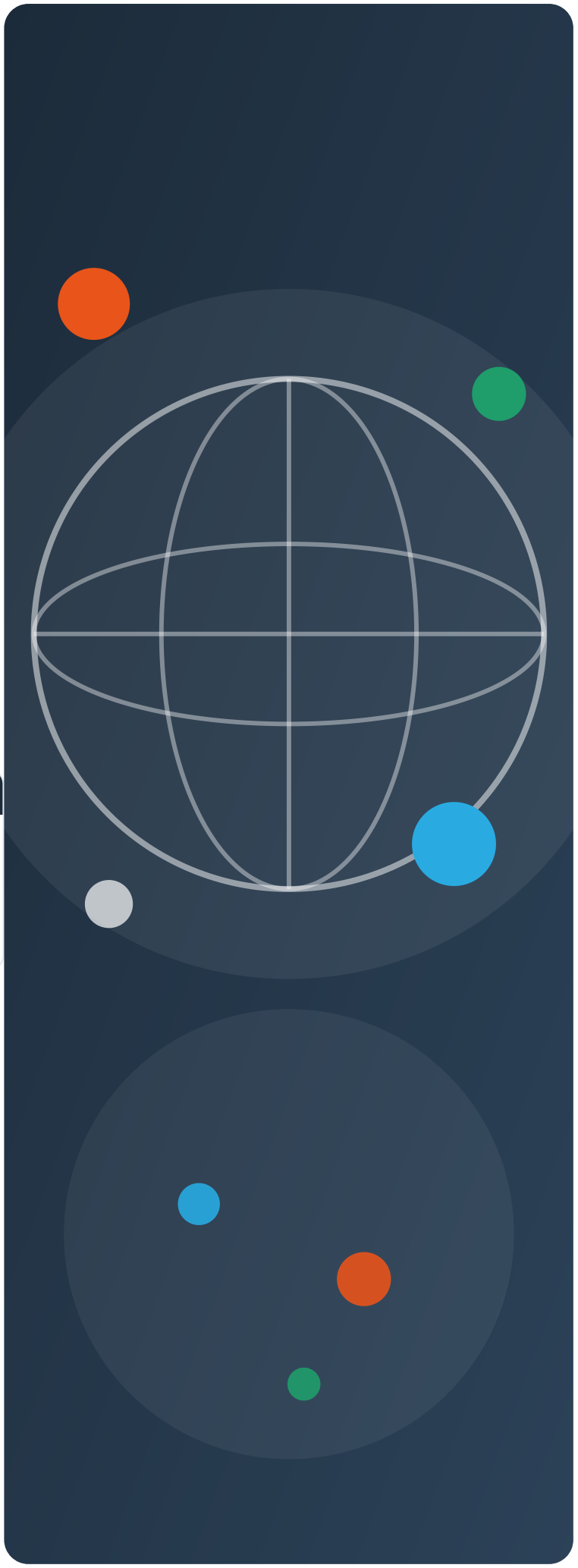
The Global Landscape

Four dominant models, six regions — mapping how open schooling actually works across the world today.

WONK RESEARCH INSIGHT

6 major open-schooling markets analysed in this report, each with a distinct dominant model.

Source: WONK Research Synthesis 2026



CHAPTER 2

The Global Landscape

Open schooling today spans a spectrum — from fully government-run open boards to independent accredited online schools to entirely parent-directed homeschooling. Each model solves a different problem for a different family.

2.1 THE FOUR DOMINANT MODELS

National Open Schooling Boards

Government-run, nationally recognised. No daily attendance. NIOS is the largest worldwide.

Full-Time Virtual / Distance Schools

Publicly funded or independent, complete curriculum online, e.g. Florida Virtual School.

Independent Accredited Online Schools

Private GCSE / A-Level / IB, serving globally distributed students, common in the UK and Gulf.

Structured Homeschooling

Parent-directed, supported by tutors and curricula. The fastest-growing, least-tracked segment.

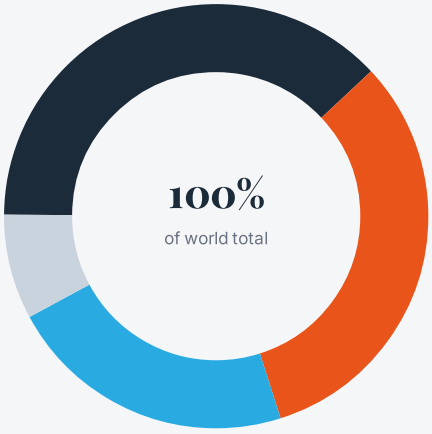
Comparative Snapshot

MARKET	DOMINANT MODEL	APPROX. SCALE
India	NIOS national open school	23.56 lakh (2.36M) learners, 2019-20 to 2023-24
United States	State virtual charters + homeschooling	~4.2M homeschooled (2024 est., NHERI/Johns Hopkins)
United Kingdom	Independent online schools (GCSE/A-Level)	~111,700 home-educated learners (autumn 2024 census, DfE)
Australia	State distance education / School of the Air	~45,858 registered homeschoolers (2024)
Gulf (UAE et al.)	UK-accredited online schools, private candidacy	Growing; no unified national count
Canada	Provincial distance ed. + homeschooling	~52,000 homeschooled students (2022–23, Statistics Canada)

A NOTE ON DATA QUALITY

Because open schooling spans government boards, private schools, and entirely unregistered home education, no single global dataset captures the category reliably. Figures here are directional, not exact.

2.2 REGIONAL CHARACTER



North America — 38%
Market value leader — deep accredited-provider density

Asia-Pacific — 32%
Enrolment scale leader, led by India

Europe / UK — 22%
Curriculum export leader

Gulf & Rest of World — 8%
Demand without domestic supply

Illustrative regional share of the global EdTech / open-schooling market, 2026, synthesised by WONK Research from multiple market intelligence sources (see Methodology).

North America leads in market value and the density of accredited providers, supported by decades of established virtual charter infrastructure. Asia-Pacific — led by India — leads in absolute enrolment, driven by scale and by open schooling's role as an equity mechanism for learners the mainstream system cannot reach. Europe and the UK lead in curriculum export, with British-accredited online schools serving internationally mobile families well beyond UK borders. The Gulf region is an important demand hub without a comparably mature domestic supply, relying heavily on UK- and India-accredited providers.

India leads Asia-Pacific in absolute enrolment — the region driving the category's next decade of growth.

SECTION 3

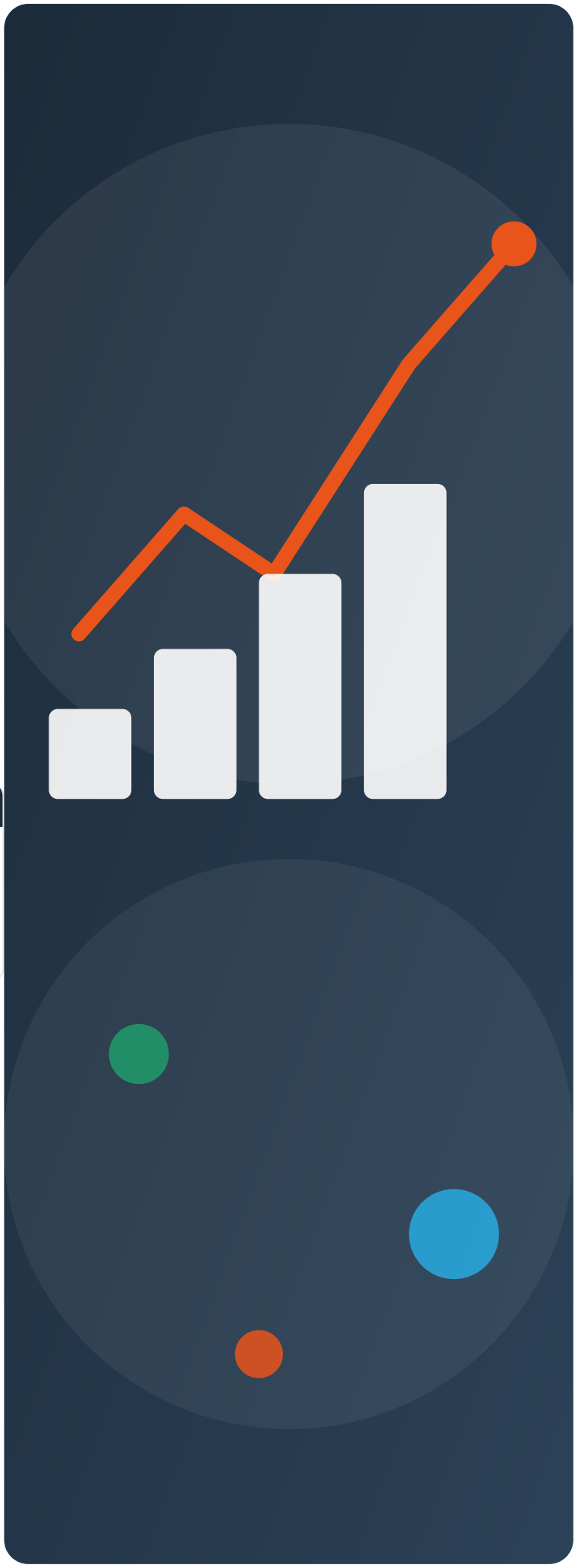
Market Trends & Growth Drivers

Four forces accelerating open schooling — and three headwinds the sector still has to solve.

WONK RESEARCH INSIGHT

41.5% projected CAGR of the global AI-in-education market through 2030, per Research and Markets.

Source: Research and Markets, AI in Education Market Report 2026



CHAPTER 3

Market Trends & Growth Drivers

MARKET SIZE 2026

$236B

Global EdTech market size.

MARKET CAGR

17.9%

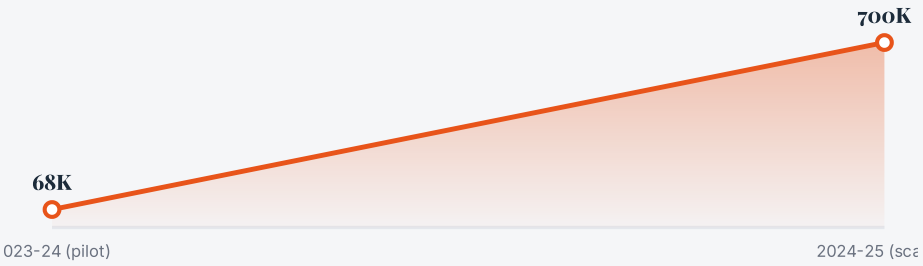
EdTech market growth through 2030.

AI SEGMENT CAGR

41.5%

AI-in-education segment, fastest-growing.

AI Tutoring Adoption Is Accelerating Fast



One leading AI tutor grew from roughly **68,000 users** in 2023–24 to over **700,000** in 2024–25 — nearly a 10x jump in a single school year, and among the fastest scaling trajectories referenced in this report.

Driver 1 — AI-Personalised Tutoring at Scale

A widely cited 2025 Harvard study found students using a well-designed AI tutor learned more than twice as much, in less time, than peers in a traditional active-learning classroom — directly answering open schooling's oldest criticism: learning without a present, responsive teacher.

Driver 2 — Durable, Not Temporary, Demand Growth

Homeschooling enrolment did not revert to pre-pandemic levels once schools reopened. US growth in 2024–25 ran at nearly three times the pre-pandemic rate, with over a third of reporting states posting record enrolment.

Driver 3 — Policy Tailwinds in Large Emerging Markets

India's NEP 2020 names open and distance learning expansion as a policy priority, aiming to bring roughly two crore out-of-school children back into education — a government actively championing open schooling as core infrastructure.

Driver 4 — The Rise of the Deliberate Chooser

Athletes, performers, gifted learners, and internationally mobile families are increasingly choosing open and online schooling as a considered first option rather than a last resort.

3.2 HEADWINDS THE SECTOR MUST STILL SOLVE

Fragmented Accreditation

Credibility varies by provider and geography — real risk of choosing the wrong pathway.

The Socialisation Question

Peer development is hardest to replicate; pastoral support still lags physical schools.

Capital Consolidation

Broader EdTech funding has cooled, even as AI-in-education keeps growing fast.

The Implication

Content is commoditising fast — credibility, mentorship, and community win instead.

WONK RESEARCH INSIGHT

The winning providers of the next decade will compete on credential credibility, human mentorship layered on AI-personalised instruction, and genuine peer community — not on content availability, which is rapidly commoditising.

The socialisation and parent-workload questions aren't abstract — they play out at kitchen tables every day.

SECTION 4

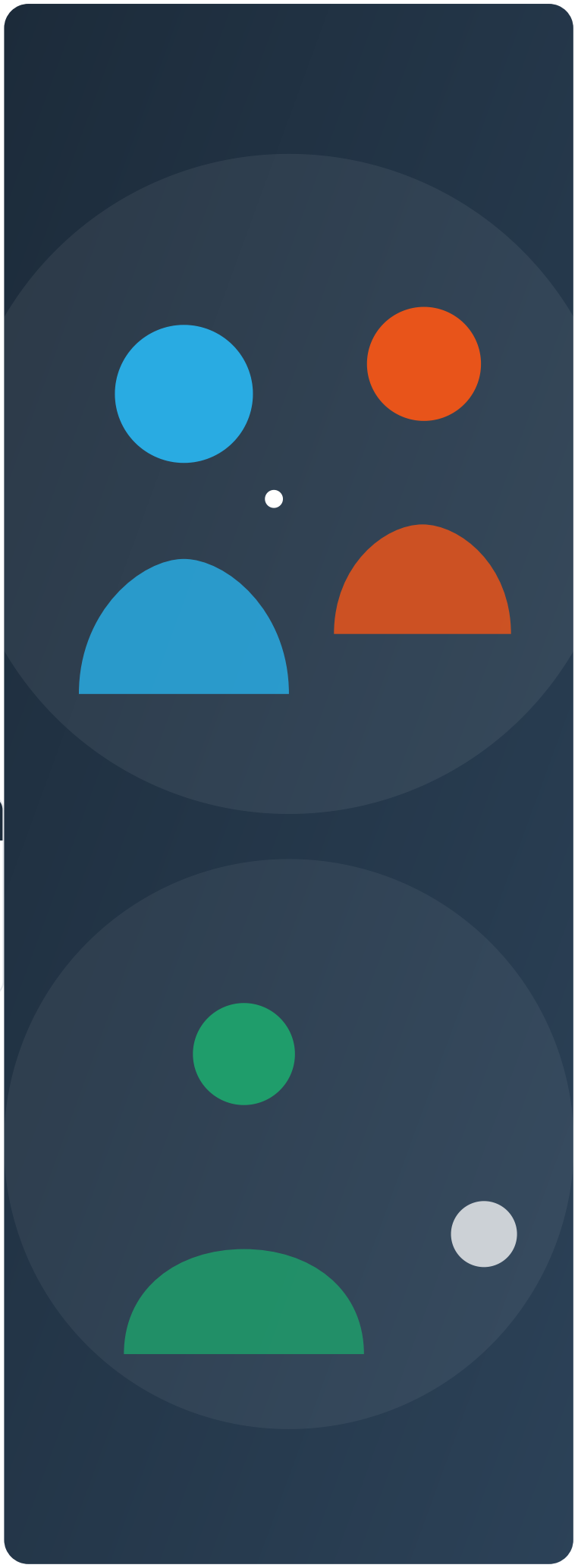
Challenges & Opportunities

Every strength of open schooling carries a corresponding challenge — an honest look at both sides.

WONK RESEARCH INSIGHT

5 in 10 open-schooling parents cite socialisation as their single biggest concern.

Source: WONK Research



CHAPTER 4

Challenges & Opportunities

Open schooling's central promise — freedom from a fixed daily schedule — is also its central risk. Without the scaffolding of a physical school, motivation, pacing, and consistency depend far more heavily on the family or the provider. This is precisely the gap that structured mentorship and AI-driven progress tracking are best positioned to close.

Challenges

- **Credential trust** — universities and employers still weigh open-schooling qualifications differently in many markets, despite formal equivalence.
- **Digital access inequity** — flexibility that helps a connected urban family can exclude a rural one without reliable devices.
- **Quality variance** among private providers — low barriers to entry mean real risk of paying for mediocre instruction.
- **Socio-emotional development** — replicating a physical school's incidental social learning remains the least-solved problem.
- **Parent workload** — home-directed models shift real planning burden onto parents, many of whom report feeling overwhelmed.
- **Regulatory ambiguity** — several fast-growing markets still lack codified national homeschooling policy.

Opportunities

- **AI-personalised instruction** can now deliver near one-to-one teaching quality at a fraction of historical cost.
- **Large underserved populations** — India's secondary dropouts, mobile families, athletes, neurodivergent learners — represent durable, structural demand.
- **Policy tailwinds** in India and elsewhere are pulling open schooling into mainstream infrastructure.
- **Hybrid models** — part open schooling, part cohort-based learning — are a credible answer to the socialisation gap.
- **Vocational integration** lets providers offer career-relevant pathways rigid conventional curricula struggle to accommodate.

THE OPPORTUNITY IN ONE SENTENCE

The provider that solves credential trust, human mentorship, and community — on top of AI-personalised content — will not just win market share; it will define what "school" means for a meaningful share of the next generation.

SECTION 5

International Case Studies

Six systems, six models — from India's national board to Australia's century-old outback classrooms.

WONK RESEARCH INSIGHT

700K+ users Khanmigo reached in the 2024–25 school year, up from ~68,000 the year before — the fastest scaling case in this report.

Source: Khan Academy / EdWeek, 2025

CHAPTER 5

International Case Studies

INDIA

NIOS — The World's Largest Open School

Established in 1989 out of a CBSE pilot begun a decade earlier, NIOS today operates through 20 regional centres and more than 11,000 accredited study centres across India and abroad, with on-demand exams and subject-wise credit accumulation.

23.56 lakh (2.36M) cumulative learners, 2019-20 to 2023-24 — the largest open schooling system in the world.

UNITED STATES

Florida Virtual School & the Stride/K12 Network

Founded in 1997, Florida Virtual School was among the world's first statewide, publicly funded online schools. Alongside the Stride/K12 network of state-chartered virtual academies, it forms the backbone of full-time public virtual schooling in the US.

Statewide virtual enrolment grew steadily for over two decades pre-pandemic, then surged sharply from 2020 onward — FLVS alone has logged more than 4.6 million semester enrolments since 1997.

UNITED KINGDOM

Oak National Academy & Independent Online GCSE Schools

Created within weeks of the UK's 2020 school closures, Oak National Academy became an independent public body providing free lessons for ages 4–16, alongside a cluster of UK-accredited online schools serving internationally mobile families worldwide.

UK home-education numbers rose from 92,000 at the autumn 2023 census to 111,700 by autumn 2024 — a 21% single-year increase, per the Department for Education.

AUSTRALIA

School of the Air & State Distance Education

Born from Alfred Traeger's 1920s pedal radio invention, Australia's Schools of the Air pioneered remote schooling for outback cattle-station children decades before the internet. State-run Schools of Distance Education carry the same mission today via video conferencing.

Registered homeschoolers in Australia rose from ~21,000 in 2019 to over 45,000 by 2024.

UAE & THE GULF

Cross-Border Reliance on UK- and India-Accredited Schools

The UAE has no explicit national homeschooling law, leaving families to rely on UK-accredited online schools for GCSE/A-Level pathways, or India-recognised boards like NIOS and CBSE, sitting exams as private candidates at authorised centres.

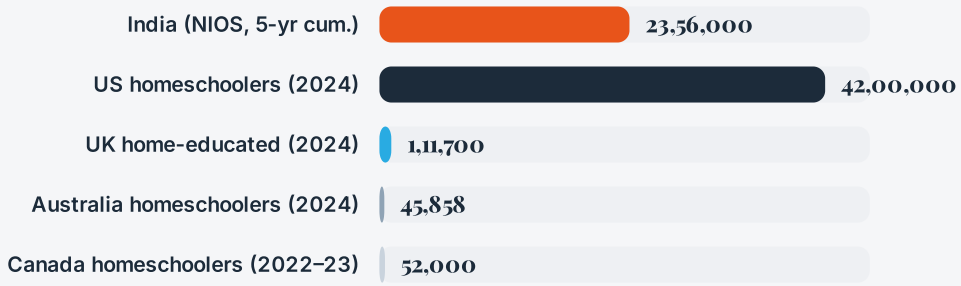
Cambridge, SAT, and AP private-candidate exam centres across the UAE serve a fast-growing homeschool population with no unified national count.

GLOBAL

Khan Academy's Khanmigo — AI Tutoring at Scale

Though not an open school itself, Khanmigo illustrates how quickly AI tutoring can scale once proven effective — a preview of the AI-tutoring layer every open schooling provider will need to build or integrate.

Grew from ~68,000 users (2023–24) to over 700,000 (2024–25), and from 45 to more than 380 school district partners in the same period.



Scale at a Glance

Figures are drawn from the most recent national estimate available for each market and use different counting methodologies (cumulative enrolment vs. point-in-time registration) — see Methodology.

SECTION 6

The Future of Open Schooling

Five forces that will reshape the category between now and 2030.

WONK RESEARCH INSIGHT

$456B projected size of the global EdTech market by 2030, up from $236B in 2026.

Source: Research and Markets, EdTech Market Report 2026

CHAPTER 6

The Future of Open Schooling

If the last decade of open schooling was about proving the model could work at scale, the next decade will be about proving it can work exceptionally well — matching or exceeding conventional schooling on the outcomes families care about most.

2026–2030: Five Forces Reshaping the Category

FORCE 1

AI Tutors Become the Default, Not the Add-On

AI-personalised instruction becomes embedded expectation rather than premium feature — the baseline layer every provider builds on top of.

FORCE 2

Credentialing Consolidates Around a Handful of Trusted Marks

Expect consolidation around a smaller number of internationally recognised, high-trust credentials (NIOS, Cambridge, established US accreditors) rather than continued fragmentation.

FORCE 3

Hybrid Micro-Schools Bridge the Socialisation Gap

Small, in-person or blended cohort models are emerging as the practical answer to open schooling's weakest point: peer development.

FORCE 4

Governments Formalise Open Schooling as Core Infrastructure

India's NEP 2020 is an early example of governments treating open schooling as deliberate infrastructure, not a tolerated exception.

FORCE 5

Vocational Pathways Integrate Directly Into Open Curricula

Deeper integration of coding, data, design, and entrepreneurship directly into curricula — an area open providers can move faster on than rigid physical-school timetables.

MARKET BY 2030

$456B

Projected global EdTech market size.

AI TUTORING GAIN

2x

Learning gains vs. active-learning classrooms.

NEP 2020 TARGET

20M

Out-of-school children the policy aims to re-engage.

WONK RESEARCH INSIGHT

By 2030, the meaningful distinction in school choice will no longer be "online vs. offline" or "open vs. conventional." It will be between providers who can prove learning outcomes and community outcomes together, and those who can only prove one.

SECTION 7

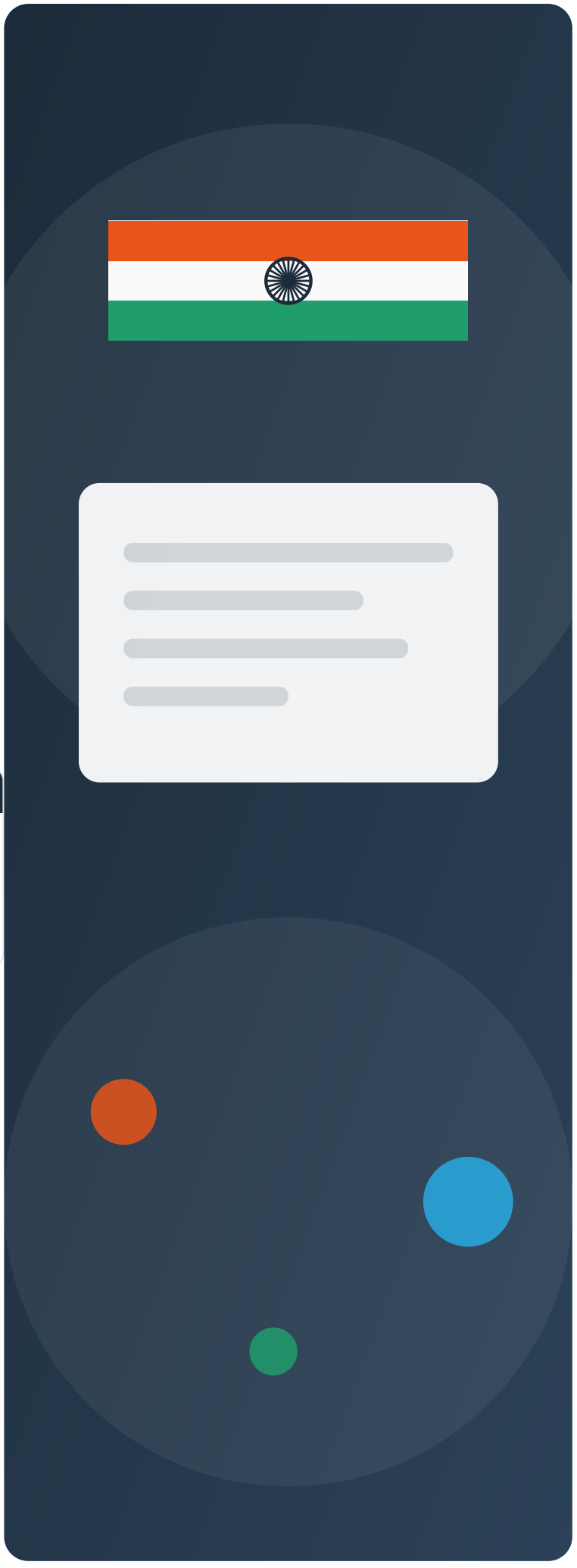
India's Opportunity

Scale without saturation — why India is the single most important market for open schooling's next decade.

WONK RESEARCH INSIGHT

47.2% of students who enter Class 1 are still enrolled and progressing by the end of higher secondary — the lowest retention point in the system.

Source: UDISE+ 2024–25, Ministry of Education



CHAPTER 7

India's Opportunity

India is simultaneously the world's largest operator of open schooling (through NIOS) and one of its largest sources of unmet demand. This dual position — scale without saturation — is what makes India the single most important market for the next phase of the category's growth. This chapter presents WONK Research's original sizing of that opportunity — the first attempt, to our knowledge, to put a rigorous number on it.

SECONDARY DROPOUT

8.2%

Grades 9–10 dropout rate, UDISE+ 2024–25 (down from 12.6% in 2021–22).

RETENTION RATE

47.2%

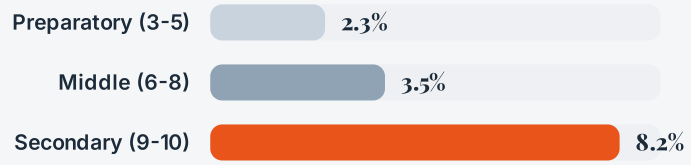
National higher-secondary retention.

NIOS SCALE

23.56L

NIOS cumulative learners, 2019-20 to 2023-24.

Where India Loses Students



UDISE+ 2024–25 data shows dropout falling at every stage — a genuine improvement — but the secondary level (9–10) still loses students at more than double the middle-school rate. More strikingly, a retention rate of just 47.2% means fewer than half of students who enter Class 1 reach the end of higher secondary — the gap open schooling, and NEP 2020, are targeting.

Why the Opportunity Remains Underserved

- **Perception gap** — NIOS is still widely perceived as a fallback despite formal equivalence for university admission and government employment.
- **Digital delivery gap** — NIOS's content and support infrastructure has not kept pace with the interactive, AI-personalised experience families now expect.
- **Fragmented private support ecosystem** — thousands of small, inconsistent tutoring providers, with no dominant quality-assured brand.
- **No one has sized this market before** — including the growing population pursuing open schooling through global curricula (Chapter 7.3), an opportunity this report is the first to quantify.

7.1 SEGMENT A — NIOS, VERIFIED FROM PRIMARY SOURCES

No government or analyst firm publishes a market size for India's open-schooling ecosystem — so WONK Research built one, bottom-up, in three segments. This is Segment A, built directly from NIOS's own Annual Report 2022–23 and Academic Prospectus 2025–26.

How We Calculated This — Verified Against NIOS's Own Data

1 REAL ADMISSIONS

2.36M

23.56 lakh cumulative, 2019-24 — NIOS Annual Report Table 5.2 + Prospectus 2025-26. Matches NIOS's own figure to within 0.01%.

2 BRIDGE TO 2026

639K

Realized ~3.9%/year growth rate (2019-2024) applied forward two years.

3 SPEND / LEARNER

₹11,780

₹7,790 tutoring (CMS 2025 survey) + ₹3,990 NIOS admission (₹2,340) & exam fees (₹1,650).

4 2026 VALUE

$90.7M

639,000 learners × ₹11,780/year ≈ ₹753 crore.

Source: NIOS Annual Report 2022–23, NIOS Academic Prospectus 2025–26, CMS Education 2025 (MoSPI), and NIOS's official fee notifications. Spend includes tutoring plus NIOS admission & exam fees. ***Growth rate applied through 2031: 3.5% learner CAGR / 8.4% value CAGR*** *— grounded in NIOS's own realised admissions trend (2019-20 to 2023-24), applied at a deliberately conservative rate given the scale NIOS has already reached.*

639,000 real students sit behind this number — each paying NIOS directly for admission and exams, on top of any private tutoring.

7.2 SEGMENT B — STATE OPEN SCHOOLS: AN ADDITIVE, INDEPENDENTLY-RECOGNISED POPULATION

State Open Schools (e.g. Rajasthan's RSOS, Madhya Pradesh's MPSOS, Bihar's BOSSE) are recognised **independently** by the Association of Indian Universities and Council of Boards of School Education — directly, not through NIOS affiliation. A State Open School learner never registers with NIOS. This makes Segment B genuinely additive to Segment A, with zero double-counting risk.

How We Sized This — Ministry of Education Exam Data + RSOS Fee Reference

1 BOARD RATIO (SC, CLASS 10)

5.14x

NIOS 15,607 of 95,801 total open-board appearances (Ministry of Education, 2025). State boards' share, aggressive end of the 1.88x–5.14x range found.

2 LEARNER COUNT

3.28M

639,000 (Segment A) × 5.14 ≈ 3,284,460 learners.

3 SPEND / LEARNER

₹9,140

₹7,790 tutoring (same as Segment A) + ₹1,350 RSOS-referenced admission/exam fee (Rajasthan reserved-category rate, used as national reference).

4 2026 VALUE

$361.7M

3,284,460 learners × ₹9,140/year ≈ ₹3,002 crore.

STATE OPEN SCHOOL LEARNERS, 2026

3.28M

5.14x NIOS, per Ministry of Education exam-results data.

VALUE, 2026

$361.7M

Tutoring spend + RSOS-referenced admission/exam fees.

GROWTH RATE APPLIED

3.5%/8.4%

Same as NIOS — same category, same tailwinds.

Source: Ministry of Education exam-results data (2025, via Careers360). RSOS (Rajasthan) fee schedule used as a national reference point for State Open Schools. 5.14x is the SC-category ratio; ST-category implies 1.88x. ***Growth rate applied through 2031: 3.5% learner CAGR / 8.4% value CAGR****, assumed to track NIOS's own realised admissions trend.*

7.3 SEGMENT C — GLOBAL OPEN SCHOOLING: INDIAN STUDENTS AS CAMBRIDGE & EDEXCEL PRIVATE CANDIDATES

Beyond NIOS and State Open Schools, a distinct population of Indian students pursue international curricula through **global open-schooling routes** — sitting Cambridge or Pearson Edexcel examinations as private candidates, without full-time enrolment at an international school.

How We Sized This — School-Network Base, Scaled to the Private-Candidate Share

1 TOTAL ENROLLED BASE

60,000

Cambridge's ~800 India-affiliated schools, plus Pearson Edexcel at a comparable regional scale, combined.

2 PRIVATE CANDIDATE SHARE

9,000

15% of the total base — a genuinely underserved, undermeasured population; see source note.

3 SPEND / LEARNER

₹9.6L

175 hrs/subject/year of 1:1 tutoring at ₹750/hour, plus annualised exam fees, across 7 subjects.

4 2026 VALUE

$104.2M

9,000 learners × ₹9.6 lakh/year ≈ ₹864 crore.

Source: Cambridge International and Pearson Edexcel school-network disclosures (India). Neither board publishes a private-candidate-specific breakdown for India — or for any market we reviewed globally. In the absence of published data, the private-candidate share and its growth rate are informed by interviews with MAS Advisory's international K-12 education experts, drawing on comparable growth trajectories observed in similar markets. ***Growth rate applied through 2031: 28% learner CAGR / 41.1% value CAGR****, reflecting the low base this segment starts from.*

IB, Cambridge, IGCSE, and other global curricula — the pathways Indian students increasingly pursue as private candidates.

7.4 THE COMBINED PICTURE: INDIA'S OPEN SCHOOLING & GLOBAL CURRICULUM MARKET

3,932,460	$557M	4,690,764	$1,260M
TOTAL LEARNERS, 2026	TOTAL VALUE, 2026	TOTAL LEARNERS, 2031	TOTAL VALUE, 2031

Same Learners, Very Different Stories — By Headcount vs. By Value

LEARNERS — 2026

- **99.8%** Indian Open Schooling
- **0.2%** Global Open Schooling

VALUE — 2026

- **81.3%** Indian Open Schooling
- **18.7%** Global Open Schooling

LEARNERS — 2031

- **99.3%** Indian Open Schooling
- **0.7%** Global Open Schooling

VALUE — 2031

- **53.8%** Indian Open Schooling
- **46.2%** Global Open Schooling

WONK RESEARCH FINDING

Global Open Schooling holds barely a fifth of a percent of learners in 2026 but already generates nearly a fifth of total market value — and by 2031, its faster growth rate lifts that value share to nearly half of the total. Indian Open Schooling (NIOS + State Open Schools) is the volume story; Global Open Schooling is the fastest-growing margin story. A serious provider needs both.

7.5 FIVE-YEAR PROJECTION, ALL SEGMENTS

YEAR	NIOS	STATE OPEN SCHOOLS	GLOBAL OPEN SCHOOLING	TOTAL LEARNERS	TOTAL VALUE
2026	639K / $91M	3.28M / $362M	9,000 / $104M	**3.93M**	**$557M**
2027	661K / $98M	3.40M / $392M	11,520 / $147M	4.07M	$638M
2028	685K / $107M	3.52M / $425M	14,746 / $208M	4.22M	$739M
2029	708K / $116M	3.64M / $461M	18,874 / $293M	4.37M	$869M
2030	733K / $125M	3.77M / $500M	24,159 / $413M	4.53M	$1,038M
2031	759K / $136M	3.90M / $542M	30,924 / $583M	**4.69M**	**$1,260M**

Growth rates: NIOS — 3.5% learner CAGR / 8.4% value CAGR, grounded in NIOS's own realised admissions trend. State Open Schools — assumed to track the same rate. Global Open Schooling — 28% learner CAGR / 41.1% value CAGR, informed by interviews with MAS Advisory's international K-12 education experts on comparable growth trajectories in similar markets. NIOS and State Open School values include tutoring plus admission & exam fees.

Two Different Growth Stories, By Design

This divergence reflects where each segment sits on its own growth curve. NIOS and State Open Schools already serve a combined base of several million learners — at that scale, sustained double-digit growth would be a genuine outlier, so a measured, single-digit pace is the more defensible assumption. Global Open Schooling, by contrast, is barely a rounding error against India's overall student population today; segments this early in their adoption curve have historically been able to sustain a faster pace for several years before growth naturally moderates.

MARKET	PENETRATION / RECENT GROWTH	WHAT IT MEANS FOR INDIA
India (combined open schooling)	~1.5% of ~26.5 crore K-12 students (3.93M learners)	Base case for comparison
United States (homeschooling)	~8.4% of ~50M K-12 students (~4.2M homeschooled)	~5.7x India's penetration — a mature, slower-growing market
United Kingdom (home education)	+21% in a single year (92,000 → 111,700, 2023→2024)	Even a mature market can spike fast off policy/awareness shifts
China (private tutoring)	Shrank 87–96% after 2021 "Double Reduction" policy ban	Cautionary tale: regulatory risk, not organic demand, ended growth

7.6 KEY PLAYERS & COMPETITIVE LANDSCAPE

India's NIOS-aligned tutoring and support ecosystem remains genuinely fragmented — this report's own Chapter 4 finding that "no dominant quality-assured brand" has emerged still holds. That fragmentation is precisely the white space WONK has built into:

National Open Schooling Boards

NIOS and State Open Schools — the institutions, not tutoring competitors. They certify; they don't teach 1:1.

Large Multi-Curriculum EdTech Platforms

Broad K-12 and test-prep players (e.g. BYJU'S, Vedantu, Unacademy, Extramarks) that touch NIOS learners incidentally, not as a core focus.

WONK — An Early Mover in This White Space

One of the first dedicated providers built specifically for NIOS-track and open-schooling families, with a 200,000+ tutor network spanning NIOS-aligned, CBSE, ICSE, IB, Cambridge, SAT & ACT — while continuing to serve learners across the world on every major international curriculum.

7.7 STUDENT & PARENT PROFILE: OPEN SCHOOL VS. CONVENTIONAL SCHOOL

A qualitative synthesis from WONK's own tutoring base and the themes documented across this report — not a census.

The Open-Schooling Family		The Conventional-School Family
Proactive choice, or re-engagement after a dropout — athletes, performers, competitive-exam aspirants	PRIMARY MOTIVATION	Default, location- and age-based enrolment — rarely an active "choice" at all
Relies on structured 1:1 or small-group tutoring — no daily classroom teacher	LEARNING SUPPORT MODEL	School provides default structure; coaching is a supplement, not the core
Highly involved in day-to-day academic planning and progress monitoring	PARENT INVOLVEMENT	Focused mainly on grades/ranking; day-to-day planning is the school's job
Actively seeks reassurance the certificate "counts" for admission & jobs	CREDENTIAL CONFIDENCE	A non-issue — the school's board already carries assumed trust
Price-sensitive, but pays willingly for support with visible outcomes	TYPICAL SPEND PATTERN	Concentrated sharply around board-exam years (10th, 12th)
Actively seeks out peer cohorts, clubs, and community to replace campus life	COMMUNITY & PEER ACCESS	Built in by default — classmates, teams, and campus social life

SECTION 8

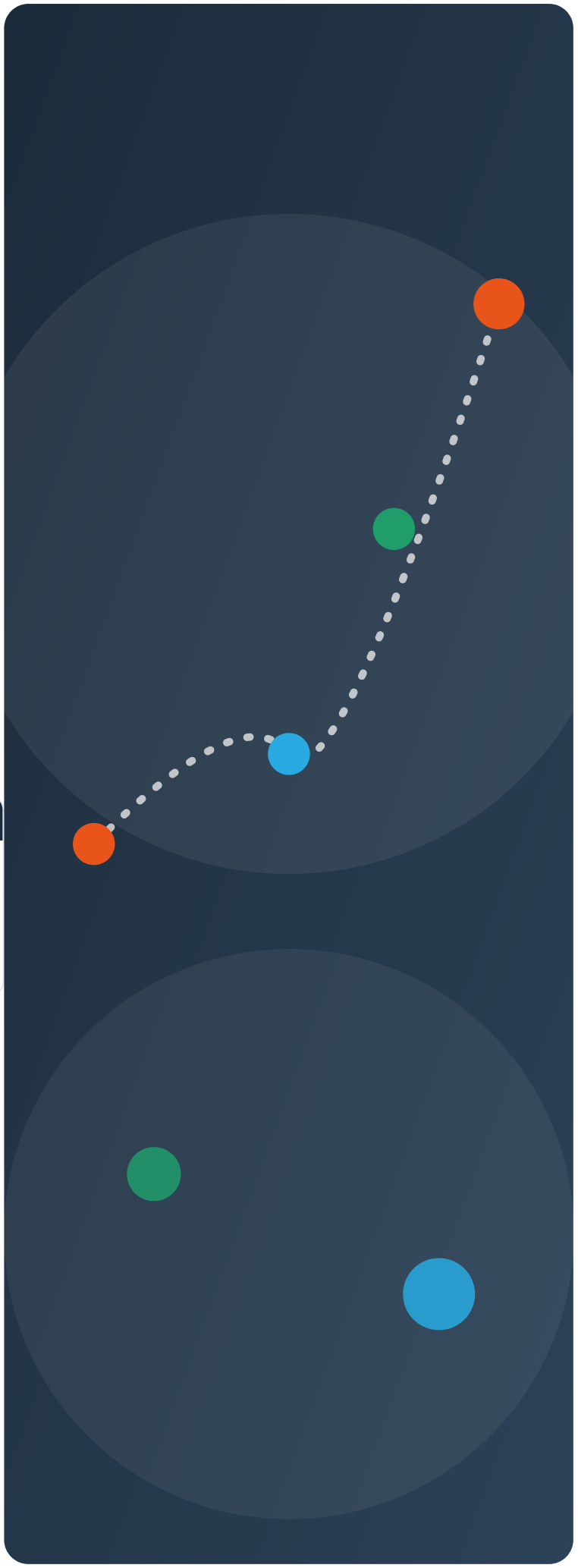
Strategic Roadmap & Recommendations

A practical roadmap for policymakers, providers, and platforms building the next decade of open schooling.

WONK RESEARCH INSIGHT

4 distinct audiences this roadmap speaks to: policymakers, providers, platforms, and families.

Source: WONK Research Synthesis 2026



CHAPTER 8

Strategic Roadmap & Recommendations

For Policymakers

- Fund a specific digital modernisation programme for NIOS and State Open Schools under NEP 2020.
- Run a public awareness campaign correcting the perception gap around NIOS equivalence.
- Set minimum quality and disclosure standards for private tutoring providers.
- Fund outcomes research tracking university admission and employment for open-schooling learners.

For Education Providers

- Treat AI-personalised tutoring as foundational infrastructure, not a differentiator.
- Invest deliberately in socialisation and community as a core product feature.
- Build transparent, outcomes-based reporting to build category-wide trust.
- Design explicit pathways from open schooling into competitive-exam and international-curriculum tracks.

Roadmap for the EdTech Sector at Large

NOW – 12 MONTHS

Make outcomes tracking table stakes, not a differentiator

Providers across NIOS-aligned, CBSE, ICSE, IB, Cambridge, SAT, and ACT curricula should treat visible, third-party-verifiable outcome tracking as baseline infrastructure — it is the fastest lever the sector has to close the credential-trust gap identified in Chapter 4.

12 – 24 MONTHS

Converge on a hybrid "AI + human mentor" model

The providers that pull ahead will layer AI-adaptive practice on top of human tutoring rather than choosing between them — matching this report's central finding that AI works best as an amplifier of mentorship, not a substitute for it.

24 – 36 MONTHS

Invest in structured community as core infrastructure

Peer cohorts, clubs, and study groups built around open-schooling and NIOS-track learners directly address the socialisation gap — the sector's most persistent unsolved weakness.

ONGOING

Normalise annual, public outcomes reporting

A sector-wide habit of publishing exam results, admissions outcomes, and family satisfaction data — not just enrolment numbers — would do more to build category-wide trust than any single provider's marketing.

CLOSING THOUGHT

Open schooling's next decade will not be won by whoever has the most content, or even the most advanced AI. It will be won by whoever families trust most to walk their child from wherever they are today to wherever they want to go next — with evidence, not just promises, to back it up.

ABOUT US

About WONK Open Schooling

WONK is an EdTech platform offering 1:1 online tutoring across IB, Cambridge, CBSE, ICSE, SAT, and ACT curricula — every board, every subject, every grade from Kindergarten through Class 12 and beyond, plus Spoken English, Python & Data Science, and 1-on-1 JEE/NEET coaching.

Built on a network of more than 200,000 verified tutors, WONK makes personalised, expert-led education accessible to any family, anywhere — open-schooling and NIOS-track families, homeschoolers, international-curriculum students without a local physical school, and conventionally schooled students seeking supplementary depth. One belief underlies all of it: a child's education should adapt to how they learn, not the other way around.

Explore WONK Open Schooling

Personalised, expert-led learning for every open-schooling family.

openschooling.wonkapp.com

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For school partnerships, curriculum collaborations, or research enquiries related to this report, please reach out via the channels above.

METHODOLOGY

Research Methodology & Editorial Note

How This Report Was Built

This report draws on three streams of evidence. The first is publicly available research — government data (including India's UDISE+ and NIOS statistical reports), market research from established industry analysts, peer-reviewed and institutional studies on AI-tutoring efficacy, and reporting from credible news and policy sources. The second is a series of qualitative conversations with industry experts, educators, and thought leaders across the open-schooling and EdTech landscape, whose perspectives helped shape our interpretation of the data and stress-test our conclusions. The third is WONK's own operational experience, drawn from years of delivering 1:1 tutoring across IB, Cambridge, CBSE, ICSE, SAT, and ACT curricula to students around the world.

Where this report cites a specific statistic, it reflects the most recent and credible publicly available figure at the time of research, cross-checked against the original primary source wherever possible (see Key Sources, next page). Because open and home-based schooling spans government boards, private accredited schools, and entirely unregistered home education, no single global dataset captures the category with precision — readers should treat cross-country comparisons as directional rather than exact.

Scope & Limitations

- This report focuses on K-12 / school-level open and distance education; it does not cover open or distance higher education.
- Homeschooling population figures are national estimates, not censuses, given the informal nature of home education in many jurisdictions, and different countries count them differently (cumulative enrolment vs. point-in-time registration).
- Market-size and CAGR estimates for EdTech and AI-in-education vary significantly by analyst firm and methodology — in some cases by 2–3x. Where this report cites a figure, it names the specific source; readers comparing to other reports should expect variance.
- This report reflects the landscape as understood in 2026; given the pace of AI-enabled education change, Chapter 6 should be read as a considered forecast, not a guarantee.

METHODOLOGY

Sources & Evidence Trail

Rather than a flat bibliography, we've grouped our sources by the role they played — so readers can judge not just *what* we cited, but *how much weight* it should carry.

Tier 1 — Government & Official Statistics

NIOS Annual Report 2022–23 and Academic Prospectus 2025–26 (primary source for year-by-year enrolment data); NIOS official admission and examination fee notifications, 2024–25; Rajasthan State Open School (RSOS) official fee schedule, used as a national reference point for State Open Schools; Ministry of Education board-wise exam-results data, 2025 (via Careers360 — a secondhand citation, not independently located); UDISE+ and NEP 2020; Comprehensive Modular Survey on Education 2025 (MoSPI, Govt. of India); UK Dept. for Education; Australian state education departments; Statistics Canada.

Tier 2 — Peer-Reviewed Research

Kestin, Miller, Klales, Milbourne & Ponti — "AI Tutoring Outperforms Active Learning," Harvard University, Scientific Reports (2025).

Tier 3 — Market Intelligence & Industry Data

Research and Markets / The Business Research Company — EdTech and AI-in-Education Market Reports, 2026; IMARC Group — India Private Tutoring Market Report; Cambridge International's own press releases and regional leadership statements on India and global entry volumes (2019, 2024, 2025, via Careers360/Tes/ANTARA); Rustomjee Cambridge School (India) published exam fees. India's open-schooling market sizing (Ch.7) is a WONK Research original model built on the above, methodology fully disclosed in-chapter, including which inputs are extrapolated.

Tier 4 — Practitioner & Industry Voices

Qualitative interviews with EdTech operators and educators; discussions with international K-12 education experts convened through MAS Advisory's network, informing assumptions for segments where no published data exists; Khan Academy leadership on Khanmigo adoption (Education Week, 2025); reporting on China's 2021 "Double Reduction" tutoring policy; WONK's own tutoring and engagement data.

Institutional Reference Points

- Johns Hopkins Institute for Education Policy (Homeschool Hub) & National Home Education Research Institute (NHERI) — US homeschooling trends
- Florida Virtual School and Stride Inc. — institutional and corporate disclosures
- Oak National Academy (UK) — institutional information

Regional & Contextual Reporting

- Reporting on UAE/Gulf homeschooling and private-candidate examination practices
- Cross-referenced news coverage used only to corroborate, never as a sole source for a headline statistic

Where a single statistic appears in more than one tier's sources with differing values, this report names the specific figure used in-chapter and flags the variance — see Scope & Limitations, previous page.

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This report would not have been possible without the contributions, perspectives, and support of a number of people and organisations.

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This report was prepared in partnership with **MAS Advisory**, a boutique education strategy, deals, and CSR consulting firm operating across three practice areas — Strategy & Implementation, Deal Advisory, and CSR Advisory & Monitoring. MAS Advisory's guiding philosophy, "Guiding decisions. Advancing education.," shaped much of the analytical rigour this report aims for.

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Industry Perspectives

We are grateful to the thought leaders and industry experts — convened with the support of MAS Advisory's network — who were interviewed as part of preparing this report. Their on-the-ground insight into what families actually experience navigating NIOS, State Open Schools, and international curricula informed the qualitative themes throughout, even where their input could not be individually cited against a specific statistic.

The WONK Team

Finally, thanks to the WONK team — our tutors, operations staff, and leadership — whose years of direct experience teaching open-schooling and international-curriculum students across India and beyond gave this report its practitioner's grounding.

The Global Open Schooling Report

India's $1.3 Billion Opportunity

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