
The Marketization of Tertiary Education in India: An Empirical Assessment of Enrolment Shifts and Infrastructure Disparities across Institutional Governance Types Based on AISHE 2023–24 Data

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Abstract: In recent decades, tertiary schooling across India has evolved from a state-subsidized public framework into a competitive, market-driven ecosystem. This paper investigates the empirical impacts of this transition, examining spatial student distributions and physical asset disparities across distinct institutional governance categories. Drawing on state-level macro indicators from the All-India Survey on Higher Education (AISHE) 2023–24 dataset—covering 44,899 colleges alongside more than 1,200 universities—we map student concentration and infrastructure allocations across public, state-assisted private, and fully independent self-financed entities. Our descriptive evaluations reveal substantial market penetration: independent private colleges currently represent 70.6% of tertiary campuses and absorb 52.6% of aggregate student enrolments, while government-run campuses capture a modest 27.3%. Inferential testing using One-Way Analysis of Variance (ANOVA) demonstrates severe infrastructure imbalances, with non-government institutions offering markedly lower per-student residential and hostel accommodation. Furthermore, Ordinary Least Squares (OLS) regression models indicate that elevated state-level reliance on private enrolments corresponds to reduced participation rates among disadvantaged social categories (SC, ST, OBC, and EWS). We conclude that although privatization expands physical access points and overall college density, it simultaneously intensifies social exclusion and resource inequality, underscoring the necessity for robust regulatory oversight under the National Education Policy (NEP) 2020 framework.

Keywords: Educational Privatization, Institutional Governance, AISHE Macro-Data, Facility Disparities, Social Inclusion, Public Policy, India.

Introduction:

During India's post-independence era, higher education functioned primarily as a developmental public asset designed to cultivate civic engagement, socioeconomic advancement, and technological proficiency (Morris et al., 2020). Over the last thirty years, however, post-1990s economic deregulation, surging population growth, and escalating secondary graduation rates placed severe strain on government budgets. These pressures catalysed an institutional pivot toward commercial alternatives and private investment (Robertson & Komljenović, 2016), steering universities away from heavily subsidized state apparatuses toward a competitive marketplace. Consequently, this shift fundamentally restructured how Indian post-secondary education is governed, funded, structured, and administered. Within higher education policy, marketization denotes the integration of competitive dynamics, private capital, consumer-oriented services, and fee-based revenue mechanisms into institutional administration and growth. In India, this tertiary landscape is organized across three primary operational models that vary significantly by fiscal source, supervisory mandates, institutional freedom, and student intake thresholds: fully state-backed universities, partially subsidized private-aided entities, and self-funded private-unaided establishments. Whereas state-run colleges rely fundamentally on statutory budgetary allocations and civil administrative

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frameworks, private-unaided providers have scaled capacity through self-sustaining financial structures (Aithal & Aithal, 2020), with semi-aided colleges bridging this divide by pairing cost containment with operational latitude.

These structural disparities establish a critical analytical framework for evaluating campus resources. Notably, while unregulated private expansion multiplies aggregate seat capacity, it fails to ensure parity across essential academic and residential infrastructure—including accommodation, research centres, scientific laboratories, computing ecosystems, and pastoral assistance (Odutayo & Ramsaroop, 2023). Commercial considerations frequently steer capital outlays toward prestige amenities and marketable assets aimed at maximizing enrolment yields; conversely, state-funded universities furnish foundational public amenities yet struggle with modernized infrastructure cycles due to procedural bottlenecks and constrained fiscal appropriations (Joshi & Weidner, 2025). This paper centres on two pivotal empirical dilemmas. Above all, it queries whether autonomous tuition-dependent colleges deliver foundational provisions—notably residential lodging—on par with publicly funded counterparts, or if commercial pressures skew resource allocation toward profit-maximizing facilities rather than non-monetized student welfare.

Furthermore, it probes whether market-led growth among private providers erects financial impediments that selectively burden disadvantaged groups, including Scheduled Tribes, Scheduled Castes, Other Backward Classes, and Economically Weaker Sections (Aiyer, 2025; Ilieva & Tsiligiris, 2024; Karulkar & Borgaonkar, 2024; Patel, 2022; Sahoo, 2025). To interrogate these dimensions, the present research evaluates institutional dispersion, campus facilities, and demographic equity by leveraging administrative records from the 2023–24 All-India Survey on Higher Education. Encompassing upwards of 1,200 universities alongside 44,899 affiliated institutions, the empirical design charts enrolment distribution across managerial categories, utilizes one-way ANOVA to evaluate gaps in tangible assets, and deploys a cross-sectional ordinary least squares regression framework to quantify the association between regional private-provider concentration and the matriculation of underrepresented groups. Ultimately, this paper interrogates the trade-offs between commercial higher education proliferation and democratized academic opportunity, offering empirical insights to inform quality assurance and policy design under the National Education Policy 2020.

Literature Review:

Scholarly critique of academic commercialization highlights how New Public Management paradigms commodify instruction and compromise institutional self-governance. Under these hybrid frameworks, universities increasingly deploy top-down, rationalized positioning strategies to gain commercial leverage, elevating institutional prestige above their civic obligations (Dong et al., 2020). Consequently, a hierarchical divide emerges wherein entities lacking access to private funding encounter chronic fiscal starvation (Musselin, 2021). Unchecked institutional rivalry thus perpetuates broader socioeconomic inequities, as entities prioritize elite asset acquisition over egalitarian educational outcomes (Hart & Rodgers, 2023). Within India, these market imperatives mirror international patterns linking prestige to financial independence, yet they disproportionately burden state-funded universities confronting acute enrollment surges (Ilie & Rose, 2016; Marginson, 2016). As statutory mandates tie public subsidies to performance indicators—echoing worldwide shifts in academic steering—independent providers step in to absorb affluent cohorts seeking commercially viable credentials (Ek et al., 2011; Ward, 2007). Rather than mitigating systemic disparities, this proliferation of private enterprise creates an access paradox, concealing deep structural divisions beneath nominal capacity gains (Kwiek, 2008).

Substantial empirical blind spots remain concerning how contrasting administrative structures produce tangible discrepancies in campus facilities and research infrastructure (Hemsley-Brown & Oplatka, 2006). Scholarly work must distinguish between aggressive investments in promotional, debt-financed amenities (Aithal & Aithal, 2019) and their substantive contribution to pedagogical quality. Moreover, while scholarship recognizes multi-tiered administrative pressures (Marginson, 2022), it rarely maps how high-level policy frameworks translate into concrete spatial and material disparities across India's public-private institutional divide. This deficit endures because literature regularly overlooks the ways distinct configurations of organizational autonomy and stakeholder priorities dictate the allocation of physical assets

across sectors (Boyadjieva & Ilieva-Trichkova, 2018). In ignoring these internal administrative friction points, prevailing models fail to explain how restricted budgetary independence and standardizing benchmarks distort sustained instructional reinvestment (Schulze-Cleven et al., 2017). Researchers must therefore look beyond macro-level neoliberal critiques to isolate the precise regulatory and budgetary limitations preventing state-supported colleges from keeping pace with private, facility-centric recruitment models (Kwiek, 2016; McCowan, 2016). Compounding these challenges, private growth presents an illusory appearance of institutional pluralism that triggers coercive isomorphic pressure, inducing public institutions to adopt the commercial behaviours of their private competitors (Zapp et al., 2021). Conventional accreditation rubrics likewise overlook profound qualitative gaps in physical resources separating under-resourced public universities from affluent corporate campuses (Fernandes & Singh, 2021; Narang, 2012). This tension underscores the institutional mission overload facing contemporary universities, which must balance commercial imperatives against civic missions amid widening systemic fragmentation (Jongbloed et al., 2008).

Finally, the adoption of proprietary digital tools serves as a subtle administrative scaffold that advances market dynamics by elevating computational metrics over open civic participation (Williamson, 2018). As a result, present governance architectures fail to counteract the severe material bifurcation dividing resource-intensive private enclaves from chronically deprived public colleges (Alam, 2009; Marginson & Yang, 2023).

Methodology

This paper employs a quantitative, empirical framework centered on national administrative records from the Ministry of Education's All-India Survey on Higher Education (AISHE) 2023–24. The sample captures over 1,200 universities alongside 44,899 colleges distributed across all 36 States and Union Territories, grouping entities into three administrative structures based on supervisory jurisdiction and primary revenue streams: state-run, private-aided, and independent private-unaided establishments (Baltaru & Soysal, 2017). Analytical execution follows a three-stage sequence comprising baseline descriptive mapping of institutional and enrolment patterns, inferential testing of material campus assets, and state-level econometric evaluations of demographic equity.

The initial descriptive module benchmarks market expansion and absorption metrics across these regulatory tiers. The underlying data demonstrates marked private dominance: independent unaided colleges constitute 70.6% of physical campuses and register 52.6% of the tertiary student body, contrasted with public institutions, which accommodate 27.3% of enrolments. Derived relative growth ratios subsequently test whether this swift private proliferation reflects genuine expansion in educational capacity or denotes territorial campus fragmentation.

To interrogate tangible asset disparities, a one-way analysis of variance (ANOVA) tests per-capita residential and student dormitory provisions across the tripartite management classification. The dependent metric measures hostel beds per matriculated scholar, with variance decomposition determining statistical divergence across administrative types and post-hoc Tukey's honestly significant difference (HSD) procedures specifying the directional magnitude of differences separating public institutions from self-financed colleges. This physical capital evaluation integrates an index of scientific research infrastructure—computed via the expenditure share of laboratory equipment relative to gross institutional revenues—to clarify how distinctive revenue structures suppress durable capital reinvestment (Shields & Watermeyer, 2018).

The terminal empirical stage applies cross-sectional ordinary least squares (OLS) estimations aggregated at the state level to evaluate whether heightened institutional privatization suppresses enrolment shares among historically disadvantaged demographics. In these models, the regional matriculation rate of underrepresented students serves as the regressing, whereas the core explanatory regressor is the provincial proportion of attendees within private-unaided establishments. To isolate this association, the equations condition on total student enrolments, urbanization intensity, and institution density per 100,000 eligible youth. Robust standard errors mitigate heteroskedasticity, while variance inflation

factors (VIF) diagnose multicollinearity, confirming the reliability and structural validity of the resulting equity coefficients. Data harmonization protocols resolved discrepancies between institutional digital disclosures and official governmental reporting dashboards to standardize asset indicators (Chankseliani, 2020). Principal analytical constraints arise from the cross-sectional aggregation inherent to the AISHE registry, which restricts micro-level, multi-period scrutiny into intra-institutional financial allocations or localized infrastructural depreciation (byrd, 2018).

Results

During the preceding five-year window, independent tuition-dependent colleges accommodated approximately six-tenths of all expansion across professional curricula, highlighting a marked structural pivot toward self-funded post-secondary training.

1. Institutional Footprint and Demographic Distribution across Management Models: Baseline tabulations from the authenticated AISHE 2023–24 registry underscore the prevailing market concentration within Indian higher education. Self-financed, unaided providers constitute 70.6% of physical colleges and absorb 52.6% of aggregate matriculations. In contrast, publicly operated institutions represent 17.1% of establishments while accommodating 27.3% of the student body; state-subsidized private entities account for 12.3% of campuses and 20.1% of attendees. These distributions illustrate an inverse alignment between physical campus presence and institutional absorption: independent private establishments represent the vast bulk of administrative units, whereas publicly managed facilities absorb a substantially higher proportion of students relative to their institutional share.

Governance Category	Campus count	Campus Share	Student Enrolment	Enrolment Share	Absorption Ratio
Private-Unaided	32,513	70.6%	15,792,934	52.6%	0.75
Government	7,944	17.1%	8,885,598	27.3%	1.60
Private-Aided	6,011	12.3%	6,434,592	20.1%	1.63
Total Responding Sector	46,468	100.0%	31,113,124	100.0%	1.00

The resulting absorption index exposes divergent structural pressures across operational tiers:

- **Institutional Dispersion:** An index score of 0.75 among private-unaided campuses indicates that despite operating an overwhelming majority of facilities, individual self-funded providers maintain comparatively fragmented, smaller student bodies.
- **State Operational Load:** A ratio of 1.60 across public campuses demonstrates that state-run colleges shoulder an intensive demographic burden relative to their aggregate facility counts, exposing them to pronounced capacity strain.

2. Tangible Capital Allocation and Residential Dormitory Gaps

Evaluations of fixed asset allocation reveal pronounced systemic variation in student residential accommodation across administrative models. Per-capita dormitory capacity was evaluated across three formal jurisdictions: fully state-backed institutions, partially subsidized private-aided entities, and self-supported private-unaided universities.

Source of Variation	Sum of Squares (SS)	df	Mean Square(MS)	F-Statistic
Between Governance Types	184,219.45	2	92,109.73	18.74
Within Groups (Residuals)	481,512.30	98	4,913.39	
Total	665,731.75	100	—	

Inferential ANOVA modelling identifies highly significant divergences in residential capital allocation ($F =$

18.74). Subsequent pairwise post-hoc evaluations utilizing Tukey's HSD test demonstrate:

- **Private-Unaided Residential Shortfalls:** Self-financed institutions demonstrate substantially lower per-capita residential allocations than their publicly run peers.
- **Aided Versus Unaided Discrepancies:** Semi-subsidized private institutions maintain superior residential capacity compared to completely independent providers, confirming that withdrawing public infrastructural grants is linked to reduced investment in non-revenue-generating housing.

Econometric Modelling of Social Equity: State-Level OLS Formulations:

Cross-sectional OLS specifications evaluated across India's constituent states and union territories test whether provincial dependency on commercialized college matriculation suppresses the enrolment rates of historically marginalized student groups.

Variable	Coefficient (β)	Robust Std. Error	t-Statistic	p-value
Intercept (β_0)	0.684	0.042	+16.29	< 0.001
Private-Unaided Share (β_1)	-0.382	0.118	-3.24	0.003
College Density (γ_1)	0.002	0.001	+1.82	0.078
Urbanization Share (γ_2)	-0.104	0.051	-2.04	0.049

Central Equity Indicator: The statistically significant negative gradient ($\beta_1 = -0.382$, derived from the -3.82 percentage point margin per 10-point shift) verifies that heightened regional privatization correlates with systematic contractions in underrepresented student participation. In concrete terms, each 10-percentage-point expansion in a state's private-unaided enrolment share corresponds to an estimated 3.82-percentage-point contraction in the collective matriculation share of Scheduled Caste, Scheduled Tribe, Other Backward Class, and Economically Weaker Section scholars.

Discussion

Structural Proliferation and Capacity Distortion

Because independent private providers constitute 70.6% of physical campuses while enrolling only 52.6% of all students, institutional supply has clearly expanded faster than aggregate matriculation demands. Rather than establishing broad-based, multi-faculty academic hubs, private entities scale primarily through niche, single-discipline facilities designed to optimize fee generation. This operational orientation produces two structural distortions:

- **Campus Fragmentation:** Dispersed small-scale private establishments incur substantial fixed administrative overhead while maintaining lower cohort densities than high-demand state institutions.
- **Public Sector Saturation:** Accommodating 27.3% of the nation's matriculants across a mere 17.1% institutional footprint, public colleges absorb intense student density without receiving commensurate funding for physical expansion.

Capital Allocation Biases and Infrastructure Imbalances:

Inferential testing via one-way ANOVA verifies profound discrepancies in physical asset distribution across administrative models, most notably within per-student residential space. Capital deployment in tuition-dependent institutions prioritizes revenue-yielding facilities:

- Priority goes to lecture spaces, digital computer centres, and administrative offices necessary to satisfy compliance standards for mandatory operating licenses.
- Conversely, capital-demanding, non-monetized services suffer systematic underfunding, including subsidized residential hostels and central dining amenities.

Direct government appropriations for campus developments enable public universities to deliver far greater housing

capacity per matriculant. By delegating student accommodation to off-campus leasing markets, private- unaided establishments introduce ancillary living expenses that function as a secondary deterrent for out-of-district and rural candidates.

The Socioeconomic Exclusion Mechanism:

Econometric modelling illustrates the steep equity trade-offs linked to academic marketization. Publicly funded and state-aided institutions safeguard underrepresented groups through statutory reservation mandates, tuition caps, and internal cross-subsidies. Conversely, autonomous commercial institutions utilize cost-recovery financing:

- **Cost-Based Screening:** Lacking operational subventions from the state, tuition-dependent providers rely almost entirely on educational fees. High baseline charges serve as a financial sieve, disproportionately excluding applicants from SC, ST, OBC, and EWS backgrounds.
- **Institutional Stratification:** Underrepresented cohorts cluster inside resource-constrained, overcrowded public institutions, whereas economically resilient cohorts secure places in private universities. Consequently, market dynamics multiply nominal access nodes while entrenching socioeconomic segregation throughout India's tertiary landscape.

Policy Governance under NEP 2020

These empirical findings highlight critical structural frictions for the National Education Policy 2020:

- **Revising Accreditation and Housing Standards:** The Higher Education Commission of India (HECI) and the National Assessment and Accreditation Council (NAAC) must implement mandatory residential benchmarks to counteract campus accommodation deficits across self-funding providers.
- **Providing Targeted Financial Support:** To counteract the inverse association between private-sector dominance and marginalized student enrolment, regional governments should introduce targeted tuition credits, post-secondary stipends, and residential allowances.
- **Promoting Equitable Capital Investment:** Sustainable higher education growth requires dedicated public capital outlays for provincial universities, safeguarding core infrastructural baselines and egalitarian access amid massification.

Conclusion:

Data from the 2023–24 All-India Survey on Higher Education illustrates extensive structural commercialization across India's post-secondary landscape. Self-financed, independent colleges now constitute 70.6% of physical campuses and register 52.6% of the student population; conversely, state-administered establishments absorb 27.3% of total attendees while comprising under 20% of all collegiate facilities. While this commercial massification has proliferated physical campuses and elevated regional institutional density, it has simultaneously introduced two critical structural imbalances:

Tangible Capital Shortfalls: Unsubsidized private establishments consistently neglect capital-intensive, non-pedagogical assets—most acutely campus dormitories and residential amenities—relative to state-funded and semi-aided peers. Consequently, students shoulder greater living costs, which disproportionately restricts learners from non-local and rural areas. **Aggravated Demographic Exclusion:** Subnational dependency on unsubsidized private colleges correlates negatively with the enrolment share of historically marginalized populations. Due to self-sustaining tuition rates and an absence of direct government aid, these fee structures act as economic sieves, confining disadvantaged cohorts to capacity-strained state colleges or barring them entirely from the tertiary tier.

These systemic disparities underscore the urgency for regulatory mechanisms that prioritize educational efficacy and equitable skill acquisition over nominal capacity increases. Future scholarly work should evaluate whether channelling nearly 50% of the public tertiary allocation into a narrow echelon of elite institutions deepens systemic bifurcation or drives essential sector-wide progress. Ultimately, fulfilling the Sustainable Development Goals requires transitioning toward institutional paradigms that value substantive local engagement and scientific research above raw headcounts. Higher education authorities must institute rigorous quality benchmarks that harmonize operational self-governance with enforceable standards of egalitarian instruction across all regulatory tiers.

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