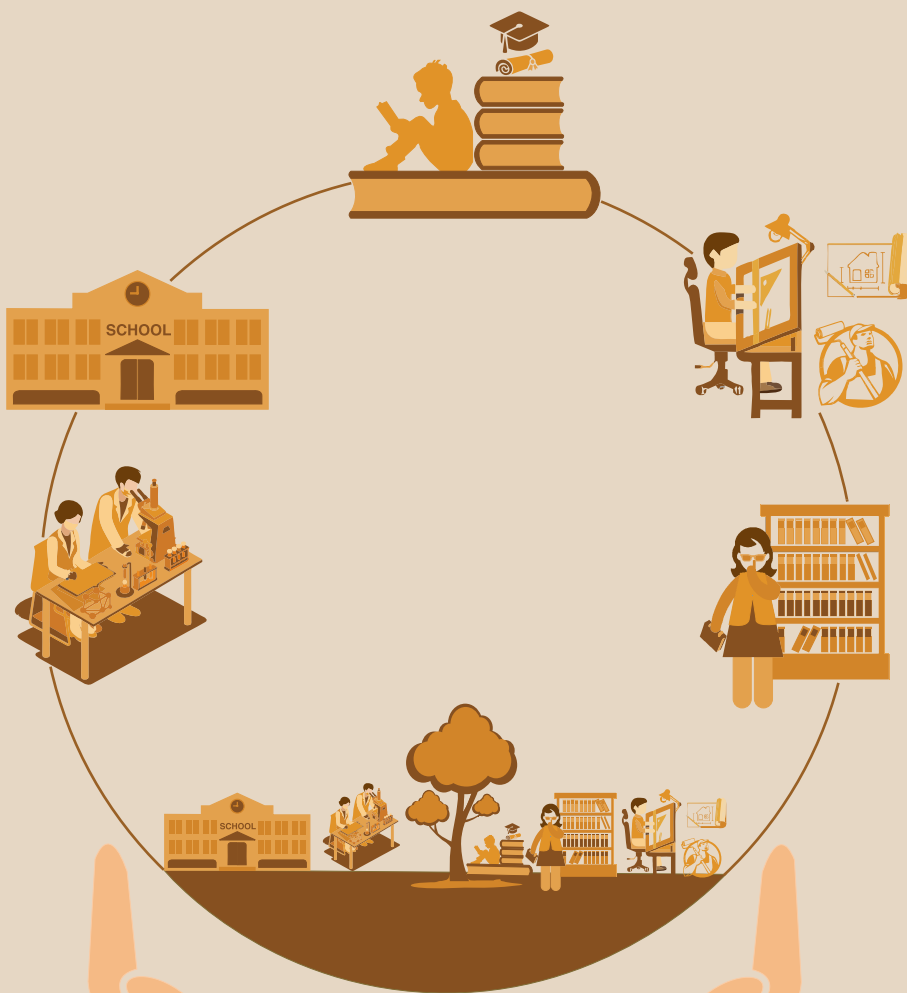


EDUCATION SECTOR PROFILE



**GOVERNMENT OF NEPAL
OFFICE OF THE INVESTMENT BOARD**



**GOVERNMENT OF NEPAL
MINISTRY OF INDUSTRY**

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FOREWORD

The promulgation of the constitution last year has punctuated Nepal's long political transition to a Federal Republic. The conclusion of this process marks the beginning of another process, that of economic transformation. The Government of Nepal has realized that its sources of funds, alone, will not meet the capital required to transform Nepal. Private investments, both domestic and foreign, will be key to Nepal's growth agenda.

In the recent years, Nepal has made great strides towards attracting private sector investments. The Investment Board, chaired by the Right Honourable Prime Minister, was established in order to fast-track large investments and act as a one-window facilitation agency. Similarly, Nepal is in the process of amending various laws and regulations to make them more investment friendly.

In an effort to attract investment, Investment Board Nepal, with the support from Ministry of Industry, has produced "Nepal Investment Guide". Building on to this initiative, the Investment Board has again taken lead to come up with this publication. This document highlights sector-specific opportunities for investment, policy environment, incentive structures, and licensing processes. This sector profile

has been produced at a very opportune time as Nepal embarks on the path of economic transformation.

I am confident that this document contains sector-specific information you would want to know in your search for potential investment destinations. Similarly, I believe that this document will give you a basic understanding of the issues and concerns you, as a potential investor, may have.

I would like to thank the Department for International Development (DFID) and Japan International Cooperation Agency (JICA) for providing financial support for this publication. Similarly, I would like to thank the staff at the Office of the Investment Board, Mr. Rob Taylor, Chief of Party, NHDP (peer reviewer), and others who have, directly or indirectly, contributed to the production of the document.

MAHA PRASAD ADHIKARI
CEO, Investment Board Nepal

ACRONYMS

| | |
|---------------|--|
| BIPPA | Bilateral Investment Protection and Promotion Agreement |
| CTEVT | Council for Technical Education and Vocational Training |
| DDC | District Development Committee |
| DEO | District Education Office |
| DOE | Department of Education |
| DTTA | Double Taxation Avoidance Agreement |
| FDI | Foreign Direct Investment |
| GDP | Gross Domestic Product |
| GoN | Government of Nepal |
| HSEB | Higher Secondary Education Board |
| JTA | Junior Technical Assistant |
| LDC | Least Developed Country |
| MOE | Ministry of Education |
| NCED | National Centre for Education and Development |
| ODL | Open Distance Learning |
| PCL | Proficiency Certificate Level |
| SEZ | Special Economic Zone |
| SMC | School Management Committee |
| TSLC | Technical School Leaving Certificate |
| UNESCO | United Nations Educational, Scientific and Cultural Organization |
| VAT | Value Added Tax |
| VDC | Village Development Committee |

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COUNTRY PROFILE

COUNTRY OVERVIEW

Country profile

Table 1. Country Profile

| | |
|----------------------------|---|
| Country name | Nepal (Federal Democratic Republic of Nepal) |
| Region | South Asia |
| Capital | Kathmandu, located in central Nepal |
| Population | 28.5 million ¹ |
| Area | 147,181 square km |
| Altitude | 59 - 8,848 m (Mt Everest) |
| Standard time | GMT + 5:45 hours |
| Governing system | Republic: multi-party parliamentary democracy with elected prime minister accountable to the parliament as executive head; constitution promulgated in 2015 |
| Language | Nepali, written in Devanagari script; English is widely used in business |
| Religion | Secular state; Hinduism 81.3%, Buddhism 9.0%, Islam 4.4%, Kirat 3.1%, Christianity 1.4% |
| Geography (south to north) | Terai region: Altitude 59–700 m Hilly region: Altitude 700–3,000 m Mountain region: Altitude 3,000–8,848 m |
| Currency | Nepali rupee (NPR), 1 USD = 108 NPR (as of 1 January 2017), 1 INR = 1.6 NPR (fixed rate) |
| ISD code | + 977 |
| Climate | Terai region: tropical/sub-tropical, hilly region: moderate, mountain region: sub-alpine/alpine |

Economic indicators

Table 2. Economic indicators of Nepal

| PARTICULARS | 2011 | 2012 | 2013 | 2014 | 2015 |
|------------------------------------|-------|-------|-------|-------|-------|
| Population (million) | 27.2 | 27.5 | 27.8 | 28.2 | 28.5 |
| GDP (USD billion) | 18.9 | 19.2 | 19.4 | 19.8 | 21.2 |
| GDP growth rate (%) | 3.4 | 4.8 | 4.1 | 5.9 | 2.7 |
| GNI per capita (USD) | 610 | 690 | 730 | 740 | 730 |
| GNI PPP per capita (USD) | 2,050 | 2,170 | 2,270 | 2,440 | 2,500 |
| Agriculture value added (% GDP) | 38.3 | 36.5 | 35.0 | 33.8 | 33.0 |
| Industry value added (% GDP) | 15.4 | 15.5 | 15.7 | 15.4 | 15.4 |
| Service value added (% GDP) | 46.3 | 48.0 | 49.2 | 50.7 | 51.6 |
| Workers' remittances (USD billion) | 4.2 | 4.8 | 5.6 | 5.9 | 6.7 |
| Inflation consumer prices (%) | 9.3 | 9.5 | 9.0 | 8.4 | 7.9 |

Source: World Development Indicators, 2016

¹ Estimated population in 2015

ECONOMIC OVERVIEW

Nepal is strategically located between India and China, two of the largest economies in the world. In 2015, the country adopted a new constitution that embraces multiparty democracy, federalism and private sector-led liberal economics. The government is committed to the promotion of foreign investment, providing a unique opportunity for foreign direct investment (FDI) in Nepal.

Although Nepal is classified as a least developed country (LDC) by the United Nations, its goal is to graduate from this status by 2022 and transition to a middle income country by 2030. To achieve these targets, an economic growth rate of 7–8% and investment in infrastructure of USD 13–18 billion by 2020 will be required. The Ease of Doing Business Index 2017 by the International Finance Corporation (IFC), World Bank Group places Nepal second only to Bhutan among all South Asian countries.² Nepal's investment potential, combined with these features, have led to an increase in interest in FDI in recent years.

Nepal has also put in place fiscal incentives and other arrangements to facilitate global trade. As a member of the World Trade Organization (WTO), Nepal offers one of the lowest import duties in the region. Nepal has also signed Double Taxation Avoidance Agreements with 10 countries and concluded Bilateral Investment Protection and Promotion Agreements (BIPPAs) with 6 countries. Fol-

lowing the entry into force of the Nepal-India Trade and Transit Treaty, Nepal enjoys duty and quota-free access to India's massive and growing market. China's rapidly growing economy also provides duty free access to approximately 8,000 products.

As a result of its prolonged political transition and inadequate infrastructure, Nepal's economic growth rate has remained at 3.8%, on average, for the past 10 years, which is below the South Asian average. Remittances continue to play a critical role in GDP growth for consumption. In FY 2015/16, remittances comprised approximately 29.6% of GDP. Remittances help to increase aggregate demand in the local market, despite low economic growth.³ Over the last decade, disposable income has increased by 14.4% per year on average, which has led to a comparable increase in consumption.

At present, with foreign currency reserves of USD 9.8 billion (as of July 2016), Nepal is in a good position to receive finance imports. However, the trade deficit, which reached 31.3% of GDP in FY 2015/16, continues to be of concern. It is expected that FDI will stimulate domestic production and gradually close this gap. Despite the catastrophic earthquake of 25 April 2015 and the transport blockade of the border that followed, Nepal has begun to rebuild and continues to be a highly attractive destination for FDI in various sectors.

² World Bank (2017) *Doing Business 2017: Equal Opportunity for All*. World Bank Publications

³ Rastra Bank Nepal (2016) *Current Macroeconomic and Financial Situation of Nepal 2015/16*. Available at: <https://nrb.org.np/og/current-macroeconomic>

THE EDUCATION SECTOR

OVERVIEW

The formal education system in Nepal dates back to 1853 when the Durbar High School was established. The nation's first college, the Tri-Chandra College, was established in 1918. During this period, education was accessible only to the ruling elites. For the general public, education dates back only to the historical changes of 1951.

By the time the Rana regime was overthrown in 1951, Nepal had 310 schools, 11 high schools, 2 colleges and a vocational school. It was only in 1956 that Nepal's first educational plan was issued. This plan paved the way for the development of Nepal's modern educational system. Further development of Nepal's education sector gained momentum in 1971 with the promulgation of the Education Act.

Education structure of Nepal is divided into two levels; school education and higher education. School education is divided into two levels, basic level and secondary level. Early grades to grade 8 is called basic level and grade 9 to 12 is called secondary level. Similarly, higher education is divided into 4 major levels. There are 3-5 years' Bachelors level, 2 years' Masters level, 1.5 years MPhil and 3-5 years PhD level.

The Ministry of Education (MoE) establishes policies and regulates the nation's education system. The MoE provides overall policy direction for the implementation and management of the GoN's education policies and programs. For their part, universities are governed and managed by specific university acts, whereas the Education Act 1971 regulates and governs school management. In the case of School Education, the Department of Education (DoE) is the principal administrative body responsible to develop and monitor school educa-

tion programs and activities. The DoE implements all educational programs in the districts through District Education Offices (DEOs). The School Management Committees (SMCs), established in each school are responsible to plan and implement that school's specific activities.

Under the MoE, there are central level agencies concerned with curriculum development, teacher development, examination, Non-formal education, and Teacher's records management. Under GoN's educational training center, the National Center for Education Development is one of the central level agency for teacher training. Under this organization there are 29 educational training centers across the country in order to encourage and promote teacher quality. In addition, there are 1,053 resource centers functioning under the District Education Offices (DEOs) across the country, established in order to support teachers.

Legally, there are two types of educational institutions in Nepal. The first type is the public institution, which receives regular government funding grants. The second type, comprised of private institutions which are comparatively smaller in number. Private institutions are funded either by the fees collected from students, from donor support, or both. Private educational institutions are established either as non-profit trusts or for profit companies.

Institutional Arrangement

Policy Level

- Ministry of Education

Regulatory and Implementation Level

- Department of Education
- Curriculum Development Center
- National Center for Education and Development
- National Examination Board
- Non-Formal Education Center
- Center of Technical Education and Vocational Training (CTEVT)
- University Grant Commission (UGC)

Current Status

In 2014, the literacy rate of Nepalese people above the age of five years was 57.4 % among females and 75.1 % among males. This clearly indicates that females have a much lower level of involvement in the educational system.

Out of the total literate population of 2014, 39% have primary education, 20 % have lower secondary education, 10.2 % have secondary education, 10.2% have higher education, and non-formally educated literate are at 4.2 %. The take-away is clear. There is a much greater participation in primary and secondary education than higher education. In Nepal there are 34,837 schools, 3,656 Higher Secondary schools and 1,369 colleges.

Table 3: Educational level of Nepalese Population (in % of the total population)

| | | Female | Male | Total |
|---|------------------------------------|--------------|--------------|--------------|
| Total Literates of 5+ Years | | 57.4 | 75.1 | 65.94 |
| Educational Attainment of 5+ Years | Primary | 20.23 | 28.06 | 39.04 |
| | Lower Secondary | 20.61 | 20.03 | 20.09 |
| | Secondary (9-10) | 11.28 | 11.75 | 11.54 |
| | SLC or Equivalent | 9.69 | 10.55 | 10.16 |
| | Intermediate or Equivalent | 5.94 | 6.85 | 6.44 |
| | Graduate or Equivalent | 2.08 | 3.47 | 2.84 |
| | Post Graduate or Equivalent | 0.55 | 1.35 | 0.98 |
| | Non-Formal Literate | 4.95 | 3.49 | 4.15 |

Source: Ministry of Education, 2015

Table 4: Educational Institutions in Nepal

| | Community | Private | Constituent | Total |
|---|----------------|--------------|-------------|----------------|
| ECD/PPCs | 30,4484 | 5,543 | - | 35,991* |
| Schools (Grade 1-12) | 29,014 | 5,823 | - | 34,837* |
| Higher Secondary Schools (Grade 11-12) | 2,705 | 952 | - | 3,656* |
| Universities | 9 | - | - | 9** |
| Campuses | 433 | 838 | 98 | 1,369** |
| Medical Institutions (Deemed Universities) | 4 | - | - | 4 |

Source: Higher Secondary Education Board, 2014

*Flash I 2014/15, DOE

**University Grants Commission, 2015.

The higher educational institutions are categorized either as community, private or constituent institution (appertaining to the university). Community Institutions are privately funded but are not for profit institutions, while private institutions are privately funded and are for profit institutions. For their part, constituent institutions are publicly owned and fully funded by the public sector.

At the Primary level, the educational enrolment is comparatively high. However, enrollment gradually decreases at higher levels of education. This is largely owing to the fact that many students drop out of schools because of exam failure, distance of the school from home, lack of access to educational materials, early entry to the employment market, and pressure to help with household work.

All 75 districts of Nepal have at least one higher education campus with the exception of Mustang and Manang. By far the largest number of campuses is found in Kathmandu district (273) whereas Humla, Dolpa, Jajarkot, and Rasuwa have one campus each. The distribution of different types of campuses (i.e., constituent [publicly funded], community [privately funded but not for profit], and private [privately funded and for profit]) across various districts. Among the different types of campuses, community and private campuses are more evenly distributed (70 and 61 district respectively) with a coverage in 93.3 % and 83.3 % districts respec-

tively, while constituent campuses can be found in 35 districts.

A large number of constituent campuses (20 campuses) are in Kathmandu district. Likewise, 25 of the community campuses are in Kathmandu district. This is comparatively higher than other districts. Similarly, 228 private campuses (32.2 % of total private campuses) are also in Kathmandu. Districts such as Humla, Bhojpur, Saptari, Manang and Mustang do not have community campuses.

INVESTMENT OPPORTUNITIES

VOCATIONAL EDUCATION

Vocational education in Nepal is developing rapidly, largely due to the GoN's increased focus on developing the population to meet industry needs for skilled laborers. The Council for Technical Education and Vocational Training (CTEVT), established in 1989, is the administrative body responsible for technical and vocational education and training. Its role is to develop policy, control quality of services, prepare competency based curriculum, develop skill standards of various occupations, carry out testing, and to conduct studies and training needs assessments. The total enrollment capacity of CTEVT in long term programs (29 month TSLC program, 15 month TSLC program and Diploma and PCL program) is 40,735. The total number institutions providing long-term courses is 529 (among which 421 (79.58%) are private institutes). There are 442 institutions providing short-term courses (6 day skill upgrading training to 1380 hours short term trainings). The courses provided by these institutes range from nursing courses to diplomas in engineering. Curriculum include courses in Civil Engineering, Laboratory Technician, Agricultural Science, Computer Engineering, Mechanical Engineering, Ayurveda General Science, Forestry, Food technology, Auto mechanics and Biomedical Equipment Engineering. The CTEVT also provides short term courses for Auxiliary Nurse Midwifery, JTA Plant science and Refrigeration and Air-conditioning.

There is an emerging market for the institutes providing vocational training. Currently, most players on the supply-side are organized as stand-alone entities and operate in market in small and fragmented way. The number of these vocational training entities can be expected to rise in the near term. This can also be justified by the number of people migrating for domestic and labor re-

lated jobs in the Middle East and Asia. Many of these jobs require vocational training. A total of 2,723,587 labor permits were issued by the Department of Labor and Employment from 2008/09 through 2014/15⁴. Most labor migrates (33%) went to Malaysia, followed by 19% to Qatar. Nearly three quarters of the absent population left their home in search of employment of which 62.4 % left for countries other than India. The 2012 Technical and Vocational Education and Training Policy also recognized the need for skill-development training programs to adjust to the demands of the labor market and make Nepali workers more competitive in the international labor market.

⁴ Department of Foreign Employment. 2014/15.

EDUCATION CITY

Education city is a new concept in Nepal. It is an area dedicated for all kinds of education institutes and for all levels to provide their services in a common space. Benefits of common facilities including libraries, canteens, research centers and playgrounds can be enjoyed through education city. There are a number of institutions that are increasing their capacity to receive students. These institutions are largely confined to large metropolitan areas. In addition to these, a greater number of students are also pursuing higher education outside of Nepal. The most popular destinations for students are USA, UK, Australia and other English speaking countries. In 2014/15 the number of students receiving no objection letters totaled 28,763. The no objection letter from Ministry of Education is a mandatory document for students going abroad for higher studies.

In addition, the open border allows many students to go to India for studies without formal authorization. These include not only students pursuing higher education, but also primary education (schooling). Schools in hilly areas of India such as Darjeeling are a popular choice.

An “education city” can be established in a peaceful environment in the outskirts of any major city. It might have common facilities including libraries, canteens, research centers and playgrounds. A multi university campus can open opportunities for the advancement of knowledge and research across all disciplines.

RESEARCH CENTERS

Research centers have crucial roles to play in the development of differentiated and effective academic systems, and in making it possible for their countries to join the global knowledge society and compete in sophisticated knowledge economies. While research universities in Nepal have not yet achieved the top levels, they are nevertheless extremely important and rapidly improving their reputations internationally. Tribhuvan University currently has 22 research centers working in such fields as bio-gas, wind energy, flora and fauna among others. Nepal lacks research centers that are committed to the creation and dissemination

of knowledge, in a range of disciplines and fields, and featuring the appropriate laboratories, libraries, and other infrastructures that permit teaching and research at the highest possible level. Most countries have recognized that research universities are key to the knowledge economy.

LAWS AND REGULATIONS

LAWS AND REGULATIONS

NEPAL EDUCATION ACT 1971

Education Act together with its amendments has effectively merged the higher secondary school and school levels. This Act is expedient to promote quality education through improvement in the management of existing and future schools all over Nepal in order to prepare human resource for national development and to maintain good conduct, decency and morality of the people in general. Any person seeking to open a school must apply to the relevant administrative body pursuant to this act for an authorization to open an Educational Trust.

CTEVT ACT 1988

The CTEVT Act is expedient to establish and manage the Council for Technical Education and Vocational Training for arrangement of technical education and vocational training in the planned way and set standard of skill and certifying the same in order to produce basic, middle level and higher level technical human resource.

Sub-section 6.2 of Section-6 states that the Council for Technical Education and Vocational Training (CTEVT) is authorized to grant the right to open and manage technical education and vocational training institutions.

THE UNIVERSITY GRANTS COMMISSION ACT 1993

The University Grants Commission is established for the appropriate distribution of grant amount received from various sectors for operation and development of Universities in Nepal and for carrying out functions to motivate for providing quality education according to the academic standard of the Universities.

ANNEX 1 : INVESTMENT INCENTIVES

| Category | Incentives and Subsidy Provision |
|------------------------|---|
| Value Added Tax | <ul style="list-style-type: none">• Schools and universities are exempt from VAT.• Research conducted by schools and universities are exempt from VAT.• Income earned from professional or vocational trainings conducted with non-profit earning motive are exempted from VAT. |
| Others | <ul style="list-style-type: none">• Education Service Tax @ 1% is levied on Admission fee and Tuition fee collected by Educational Institutions operated by Private Sectors. |

ANNEX 2 : RELEVANT AGENCIES AND ORGANIZATIONS

OFFICE OF THE PRIME MINISTER AND COUNCIL OF MINISTERS

Singha Durbar, Kathmandu, Nepal
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MINISTRY OF INDUSTRY

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MINISTRY OF LABOUR AND EMPLOYMENT

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MINISTRY OF SCIENCE, TECHNOLOGY AND ENVIRONMENT

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NATIONAL PLANNING COMMISSION

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NEPAL RASTRA BANK

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DEPARTMENT OF IMMIGRATION

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Email: dg@nepalimmigration.gov.np
Website: www.nepalimmigration.gov.np

INLAND REVENUE DEPARTMENT

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SECTOR PROFILE : EDUCATION

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