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"EDTECH MONOPOLIES AND PEDAGOGICAL COMMODIFICATION: REGULATORY CHALLENGES OF PRIVATE TUTORING PLATFORMS IN INDIA COMPARED TO WESTERN REGULATORY FRAMEWORKS"

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ABSTRACT

The rapid platformization of private supplementary tutoring in India has concentrated market power among a handful of venture-backed entities, converting pedagogical processes into scalable, data-extractive commodities while formal schooling remains under-resourced. Drawing on Bray's comparative analyses of shadow education and recent scholarship on platform capitalism in education, this study interrogates how the absence of sector-specific legislation—relying instead on fragmented consumer-protection notices, the Digital Personal Data Protection Act 2023, and state-level coaching guidelines—permits predatory pricing, opaque algorithmic personalization, and the redefinition of learning as a private good. Western counterparts, by contrast, embed stronger guardrails: the United States' FERPA and COPPA frameworks impose institutional control over student records and parental consent for minors, while the European GDPR and emerging AI Act classifications treat adaptive tutoring systems as high-risk processing requiring data-protection impact assessments and purpose limitation.

Through a multi-method comparative design—critical policy discourse analysis of Indian guidelines and NEP 2020 alongside doctrinal examination of U.S. and EU instruments, supplemented by secondary quantitative indicators of market concentration and enrolment disparities—the inquiry maps institutional voids that enable monopoly formation and equity erosion1. Results demonstrate that India's laissez-faire posture accelerates pedagogical standardization and socioeconomic stratification, whereas Western regimes, despite their own limitations, better constrain secondary commercial uses of learner data and preserve residual public oversight2. These asymmetries underscore the necessity of hybrid regulatory architectures that combine competition remedies, child-specific data protections, and pedagogical quality standards to re-embed private tutoring within a public-interest educational ecology rather than allowing it to operate as an unaccountable parallel system3.

KEYWORDS: EdTech Monopolies, Pedagogical Commodification, Private Tutoring Platforms, Shadow Education, Regulatory Asymmetry, Educational Equity

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I. NAVIGATING THE SHADOW CURRICULUM: EDTECH CONCENTRATION, PEDAGOGICAL COMMODIFICATION, AND THE REGULATORY ASYMMETRY BETWEEN INDIA AND WESTERN FRAMEWORKS

In India, the rapid growth of private tutoring platforms has turned supplemental education from a peripheral "shadow" activity into a dominant, platform-mediated market that challenges the state's ability to protect education as a public good, alters pedagogical relations, and increases inequality. This phenomenon, which is sometimes referred to as "shadow education," entails fee-based academic help that functions

Original Research

primarily outside of traditional education's ethical and legal frameworks4.

The post-pandemic rise in venture-backed EdTech platforms in India, along with the long-standing need for high-stakes test preparation, has led to a notable concentration of the industry. Platforms have converted pedagogical contact into standardized, scalable digital goods by utilizing network effects, data extraction, and aggressive customer-acquisition techniques to grab significant portions of the tutoring business. The reduction of teaching and learning to quantifiable, marketable units optimized for engagement metrics, subscriber retention, and investment returns rather than comprehensive educational aims is an example of pedagogical commodification. Due to the significant correlation between household income and access to high-quality digital tutoring, these dynamics increase academic pressure on pupils and worsen educational disparities5.

India's regulatory remedies are still disjointed and insufficient. The Ministry of Education's 2024 Guidelines for the Regulation of Coaching Centers include regulations for registration, age limitations (no enrollment under 16), and minimum qualifications for tutors, fee transparency, mental health provisions, and bans on deceptive guaranties. However, because state-level action within India's federal framework is required for implementation, these rules are advisory rather than legally enforceable national law, which leads to unequal enforcement and limited coverage of exclusively digital platforms. The Digital Personal Data Protection Act of 2023 and consumer protection regulations are complementary tools that deal with data and advertising activities but do not include sector-specific pedagogical or structural competition safeguards. Industry consortiums' self-regulatory efforts have not been enough to combat predatory pricing, data monetization, and quality opacity4.

Western regulatory structures, on the other hand, provide more robust safeguards for students and academic integrity. The Children's Online Privacy Protection Act (COPPA) and the Family Educational Rights and Privacy Act (FERPA) in the United States place strict restrictions on the gathering, use, and disclosure of student data by EdTech providers, especially for minors. Schools are still largely responsible for overseeing these regulations. The General Data Protection Regulation (GDPR), which requires data minimization, purpose limitation, explicit consent (or parental consent for children), and strong individual rights, is implemented in European jurisdictions. Additionally, national authorities' education-specific guidelines further restrict the commercial exploitation of learner data. These regulations create more explicit fiduciary standards and enforceable accountability mechanisms that are lacking in the Indian setting, notwithstanding their flaws and primary focus on privacy rather than competition or pedagogy6.

Therefore, a critical asymmetry is revealed by comparative analysis: Western systems, despite their own market pressures, anchor EdTech within established data-protection and consumer-rights architectures, while India's high-stakes examination culture and rapid platformization have outpaced regulatory capacity, allowing monopolistic tendencies and commodification to advance with limited counterweights. Stronger, enforced regulation of tutoring platforms is necessary to close this gap, as is a reaffirmation of education's public nature in opposition to simply commercial reasoning.

II. THE SHADOW ECONOMY OF LEARNING: MONOPOLISTIC CONSOLIDATION AND PEDAGOGICAL COMMODIFICATION IN INDIAN EDTECH

In India, private tutoring platforms have developed into a parallel system worth billions of dollars that commodifies education by turning knowledge into scalable digital products and consolidating market power among a small number of powerful companies. This literature study places India's regulatory gaps against more structured Western frameworks, drawing on Bray's substantial comparative studies on shadow education. It shows how under-regulation exacerbates injustices and pedagogical distortion4.

a. Platform Dominance and the Commodification of Pedagogy

According to academic investigations, Indian EdTech is a prime example of platform capitalism in the educational sector. By using venture financing for aggressive client acquisition and predatory pricing, dominant businesses created network effects that marginalized independent instructors and smaller suppliers. The transition of instruction into standardized, algorithm-driven material packages optimized for retention and upselling rather than equity or deep learning is an example of commodification5. Neoliberal logics reframe academic knowledge as marketable commodities, widening digital disparities and undermining teacher autonomy, as demonstrated by recent research on EdTechs in India and the UK during and after the epidemic5. Parallel research on shadow education demonstrates how private tutoring both "shadows" and threatens official education by emphasizing test scores above overall growth7.

b. India's Fragmented Regulatory Landscape

The majority of private tutoring centers in India are treated more like businesses than like educational institutions, allowing them to avoid the standards of quality, equity, and accountability that apply to schools. The National Education Policy 2020's focus on technology and blended learning has unintentionally increased commercial opportunities without matching regulation, creating a legal void in the industry1. State-level initiatives at regulating are still inconsistent and mostly advisory; the Ministry of Education's 2024 rules on coaching centers include age limitations and offline safety but mainly ignore online platforms. Partial controls on advertising and children's data are introduced by consumer-protection measures and the Digital Personal Data Protection Act 2023, but enforcement is still multi-agency and reactive4.

c. Western Regulatory Contrasts

Counterarguments from Western jurisdictions are instructive. In addition to FTC regulation of unfair practices, the United States depends on FERPA and COPPA to safeguard student information and children's online privacy. While the UK's Age Appropriate Design Code include child-centric design criteria, the European Union's GDPR adds strict rules for data minimization, permission, and purpose limitation6. Despite their flaws, these frameworks see platform behavior and educational data as issues of public interest rather than just business. Comparative research emphasizes how these focused, rights-based strategies stand in stark contrast to India's laissez-faire attitude8.

d. Toward Regulatory Coherence

The compilation of research agrees that sector-specific regulations on market concentration, educational standards, algorithmic transparency, and children's data must be combined with current competition and consumer protection laws to create hybrid governance. Under the pretense of technical advancement, pedagogical commercialization runs the risk of solidifying educational inequity in the absence of such safeguards9.

III. RESEARCH METHODOLOGY

a. Epistemological Anchoring and Critical Comparative Design

This investigation examines the structural creation of EdTech monopolies and the commercialization of teaching using a critical realist epistemology in conjunction with comparative institutional analysis. The article presents private tutoring platforms as hybrid organizations that serve as both educational mediators and data-extractive market actors, drawing on shadow education literature (Bray, 20254) and platform capitalism frameworks. The design is multiscalar and multijurisdictional, using the regulatory environment in India as the main case and a few Western frameworks (the United States, the European Union, and the United Kingdom) as comparative references.

b. Case Selection and Analytical Scope

Three prominent Indian platforms—Physics Wallah, Unacademy, and Byju's—are analyzed as classic locations of market concentration and pedagogical commodification. These are contrasted with Western regulatory frameworks, such as the UK's Age Appropriate Design Code and Online Safety Act, the EU's GDPR–Digital Services Act–Digital Markets Act ensemble, and the U.S. FERPA–COPPA system and FTC enforcement proceedings. While maintaining the existence of sizable private supplemental tutoring markets, jurisdictional selection employs a most-different-systems logic that maximizes variety in state capability, federal structure, and data-protection intensity.

c. Data Corpus and Collection Strategy

The main corpus consists of (a) statutory and softlaw instruments (Digital Personal Data Protection Act 2023 and its 2025 Rules; Consumer Protection (E-Commerce) Rules; EU DSA 2022 and subsequent guidelines on minors; U.S. COPPA Rule and FTC 2023 Edmodo order); (b) policy briefs and decisions from competition authorities, such as, ORF Issue Brief No. 879, 2026; Sarkar, 2025; Misra & Trivedi, 2024; UNESCO, 2025. No media or non-peer-reviewed sources are accepted as secondary resources; only official reports and academic publications are accepted.

d. Analytical Procedures

A methodology-based technique that is stacked is used. Firstly, doctrinal legal analysis maps formal regulatory coverage along four axes: consumer protection measures, learner-data governance, pedagogical quality assurance, and market-structure monitoring. Secondly, Faircloughian critical discourse analysis looks at how policy texts present education as a public benefit as opposed to a commercial business. Thirdly, structured comparison matrices operationalize aspects of enforcement capability, regulatory intensity, and residual gray areas, including the way online and offline tutoring are treated differently. The path from India's laissez-faire regime to the 2024 Guidelines and its partial extension to pure digital platforms is reconstructed using process tracing.

e. Validity, Reflexivity, and Limitations

Internal validity is improved by triangulating law texts, competition records, and independent academic evaluations. The researcher's positionality within the creation of knowledge in the Global South is given reflexive attention. By anchoring the analysis in publicly verifiable instruments as of mid-2026, limitations such as limited access to private platform algorithms and the quickly changing nature of secondary laws are lessened.

IV. MONOPOLY DYNAMICS AND PEDAGOGICAL COMMODIFICATION IN INDIAN EDTECH

Private tutoring platforms in India have developed into concentrated market structures where venture-backed companies control the test-preparation and supplemental learning areas by utilizing network effects, data collecting, and aggressive client acquisition. This perspective commodifies pedagogy by turning curriculum design, assessment, and instructional delivery into scalable digital objects intended for profit rather than formative learning or equity. Platform logics that prioritize engagement metrics, standardize material, and turn parental worry into subscription models exacerbate shadow schooling, which has long been ingrained in India's culture of high-stakes exams. As a result, educational segregation along class and regional lines is exacerbated by a pedagogical shift from relational teaching to algorithmic customization that prioritizes quantitative outcomes above critical inquiry.

a. Regulatory Asymmetries: India's Fragmented Response versus Western Frameworks

In comparison to the size of the industry, India's regulatory framework is still inadequate. Although the Ministry of Education's 2024 Guidelines for Regulation of Coaching Centers set forth requirements for registration, fee transparency, tutor qualifications, age limitations, and bans on deceptive claims, their main purpose is to serve as model frameworks for state-level adoption within a federal system. Online platforms frequently evade cogent monitoring, implementation is inconsistent, and competition policy instruments have only just begun to engage in consolidation. Western frameworks, on the other hand, show more institutionalization of quality control and consumer protection. Professional groups with partial government recognition, such the Australian Tutoring Association and The Tutors' Association, uphold rules of conduct pertaining to advertising ethics, tutor standards, and client contracts in both Australia and the UK. Instead of focusing solely on market laissez-faire, European and North American models prioritize data protection, advertising rules, and, in certain situations, integration with public tutoring programs. China's 2021 "Double Reduction" policy, which forbids for-profit academic tutoring in mandatory education, is a more restrictive extreme, but also highlights the lack of political will in India's progressive strategy.

b. Crucial Findings and Comparative Insights

Only a small percentage of countries uphold educational rules for tutoring businesses, according to a comparative examination of UNESCO Global Education Monitoring data and cross-national regulatory surveys. Due to India's dependence on voluntary industry norms and consumer protection bodies, structural monopoly issues and educational commodification are mainly ignored. Enforceable rules on openness, data governance, and instructor competency can reduce excesses without reducing supply, as shown by Western self-regulatory and hybrid approaches. Key findings show that unregulated platform dominance accelerates credentialism and undermines the legitimacy of public schools, whereas coherent regulation—which combines pedagogical quality benchmarks, data rights for minors, and competition oversight—better aligns private provision with public-good goals.

c. Policy Imperatives for Balanced Governance

Mandatory algorithmic audits, structural separation of content and data layers, enforced refund and advertising regulations, and integration with National Education Policy 2020 equitable goals are all necessary for effective solutions that approach huge platforms as systemic players. India has to go beyond suggestions in favour of legally enforceable, federally coordinated regulation that limits monopolistic power while maintaining legitimate supplemental assistance, based on global evidence and Western professionalization experiences. Then and only then can pure market extraction not compromise pedagogical integrity.

V. DISCUSSION

The rapid ascent and subsequent recalibration of India's private tutoring platforms illuminate profound tensions between market-driven innovation and the public-good character of education. This discussion synthesises the empirical patterns of concentration, the processes of pedagogical commodification, and the comparative regulatory deficits relative to Western frameworks. It argues that the absence of sector-specific, education-centred regulation in India has permitted oligopolistic structures and extractive practices that Western jurisdictions have mitigated through layered privacy, consumer-protection, and competition instruments. The analysis proceeds under three interrelated headings: market concentration and monopoly dynamics; pedagogical commodification and equity implications; and regulatory asymmetries with Western frameworks, concluding with policy implications grounded in the evidence.

a. Market Concentration and Monopoly Dynamics in Indian EdTech

India's EdTech sector, particularly the private supplementary tutoring (PST) segment oriented toward high-stakes examinations, exhibits pronounced concentration. At its peak in 2022, BYJU'S attained a valuation of approximately USD 22 billion and commanded a dominant share of the digital learning market through aggressive acquisition strategies and network effects. Subsequent insolvency proceedings, valuation collapse to near-zero, and creditor disputes underscore the fragility of blitzscaling models reliant on continuous capital inflows rather than sustainable pedagogical value (UNESCO Global Education Monitoring Report analyses; company filings referenced in competition discourse). Concurrently, Physics Wallah has emerged as a leaner, high-volume contender, reporting revenues exceeding ₹2,800 crore in FY25, while consolidation moves such as the Competition Commission of India (CCI)-approved upGrad–Unacademy combination signal a shift toward a "two-horse" oligopoly.

Table 1 quantifies the trajectory of leading platforms, illustrating both the scale of capital concentration and the subsequent correction.

Table 1: Selected Indian EdTech Platforms: Valuation and Revenue Trajectories (2021–2025)

Platform	Peak Valuation (USD)	Approx. FY25 Revenue (₹ crore)	Key Post-Peak Development
BYJU'S	22 billion (2022)	N/A (insolvency)	NCLT proceedings; valuation ≈ 0
Unacademy	3.4 billion (2021)	~820	Merger pathway with upGrad; offline retreat
Physics Wallah	~5 billion (IPO 2025)	~2,887	Profitability focus; multi-format expansion
upGrad	Multi-billion	Combined entity ~2,400	CCI clearance for Unacademy acquisition

Sources: *Aggregated from CCI statements, company disclosures, and sector analyses consistent with market-study methodologies (Competition Act 2002 framework).*

Network effects inherent to platform architecture—data accumulation, content lock-in, and brand-mediated parental trust—have amplified first-mover advantages. Predatory pricing during the funding boom, followed by aggressive sales practices (including EMI-linked enrolment and misleading outcome claims), generated substantial consumer grievances. The Central Consumer Protection Authority (CCPA) has issued dozens of notices and imposed cumulative penalties exceeding ₹1 crore on coaching entities for deceptive advertising, yet these interventions remain reactive and under-powered relative to the sector's turnover. In contrast to traditional brick-and-mortar coaching hubs (Kota, Sikar), digital platforms scale nationally without corresponding infrastructural or pedagogical accountability, intensifying monopoly risks under the Competition Act 2002's abuse-of-dominance provisions. The structural predisposition of digital markets toward mono/oligopolies, previously noted in analyses of technology layers (infrastructure, data, AI), is acutely visible here.

b. Pedagogical Commodification and Equity Consequences

Pedagogical commodification refers to the transformation of teaching-learning processes into standardised, monetisable products optimised for retention metrics, completion rates, and lifetime value rather than holistic educational aims. Indian PST platforms operationalise this through subscription models, cohort-based premium programmes, and data-driven personalisation that prioritise examination scores over critical thinking, socio-emotional development, or curricular alignment with the National Education Policy (NEP) 2020. Students and parents are recast as consumers; knowledge becomes a private good purchased according to ability to pay.

Empirical patterns of private tutoring uptake underscore equity distortions. National Sample Survey and ASER-linked data indicate that private supplementary tutoring reaches 26–32 % of rural students by upper-primary grades, with markedly higher incidence in competitive-examination corridors. The unregulated status of PT centres as commercial establishments—rather than educational institutions—permits circumvention of teacher-qualification norms, fee transparency, and mental-health safeguards. Guidelines issued by the Ministry of Education in 2024 address registration, age restrictions (no enrolment under 16 in certain contexts), counselling provision, and advertising standards, yet remain non-binding across India's federal structure. State-level experiments (Rajasthan Coaching Centres Bill, earlier Maharashtra drafts) have been fragmentary.

Commodification exacerbates existing inequalities. High-fee digital packages and offline franchise models systematically exclude lower-income households, while the residual public system absorbs residual demand without commensurate resource augmentation. Data-privacy dimensions compound the problem: platforms process extensive children's data under the Digital Personal Data Protection Act 2023, yet consent-based models effectively transfer ownership of learning analytics to private entities. Academic critiques emphasise that such arrangements invert the socially transformative purposes of education articulated in constitutional and NEP frameworks, substituting growth metrics for equity and quality.

Comparative Regulatory Frameworks: India versus Western Jurisdictions

Western regulatory architectures, while imperfect, embed education-technology activities within multi-layered protective regimes that India lacks. Table 2 contrasts key instruments.

Table 2: Comparative Regulatory Instruments for EdTech / Private Tutoring

Dimension	India	European Union / United Kingdom	United States
Data protection	DPDP Act 2023 (phased; children's data rules)	GDPR + Age Appropriate Design Code (UK)	FERPA, COPPA, state student-privacy laws
Consumer protection	CCPA notices; general Consumer Protection Act	Strong unfair-commercial-practices directives	FTC enforcement; state AG actions
Competition / monopoly	Competition Act 2002 (ex-post); no sector-specific ex-ante	Digital Markets Act (ex-ante gatekeeper rules)	Antitrust (Sherman, Clayton); FTC scrutiny

Education-specific	MoE 2024 guidelines (non-binding); state variation	Member-state education authorities; accessibility directives	IDEA accessibility; state curriculum oversight
Tutoring regulation	Fragmented; commercial-establishment treatment	Variable; some licensing of centres	Largely market-driven with consumer safeguards

Sources: *UNESCO GEM surveys (2021 responses on tutoring regulation); GDPR framework; US federal statutes; Indian MoE guidelines and Competition Act jurisprudence.*

In the European Union, the General Data Protection Regulation imposes strict data-minimisation, purpose-limitation, and parental-consent requirements, reinforced in the UK by the Age Appropriate Design Code. The Digital Markets Act introduces ex-ante obligations for gatekeeper platforms, addressing self-preferencing and data advantages that Indian platforms currently exploit without equivalent restraint. United States frameworks combine federal privacy statutes (FERPA for education records, COPPA for under-13 users) with state-level student-data protections and vigorous consumer-enforcement actions. Although private tutoring itself remains lightly regulated in most Western jurisdictions—consistent with the UNESCO finding that only approximately 24 % of surveyed systems reported educational regulations for tutorial enterprises—the surrounding consumer, privacy, and competition architecture constrains extractive behaviour more effectively than India's predominantly commercial treatment of platforms.

China's 2021 "Double Reduction" policy, which imposed non-profit status and severe operational limits on compulsory-education tutoring, represents an extreme counterpoint; Western approaches favour calibrated oversight rather than prohibition. India's federal diversity and NEP 2020 emphasis on technology integration create both opportunity and risk: without binding national standards on pedagogical quality, fee structures, and data governance, platform monopolies can deepen the very inequalities the policy seeks to ameliorate.

c. Policy Implications and Pathways Forward

The evidence indicates that self-regulatory codes (India EdTech Consortium under IAMAI) have proven insufficient against aggressive commercial practices and concentration dynamics. A coherent response requires three complementary measures. First, statutory elevation of the 2024 MoE guidelines into binding national legislation, with a dedicated Coaching Institutes Regulatory Authority empowered to enforce registration, qualification norms, fee caps relative to public expenditure, and mental-health protocols. Second, explicit incorporation of EdTech platforms into competition-policy scrutiny under an updated Digital Competition framework, addressing network effects and data advantages. Third, community-oriented data-governance models that vest ownership of student learning analytics with schools and parent bodies rather than platforms, aligning with DPDP principles while preventing proprietary lock-in.

Comparative experience demonstrates that regulation need not stifle innovation. Western privacy and consumer regimes have coexisted with vibrant EdTech ecosystems; India's challenge is to embed similar guardrails before oligopolistic structures become irreversible. Failure to do so risks entrenching pedagogical commodification as the dominant mode of educational provision, undermining the constitutional commitment to equitable, quality education. Future research should prioritise longitudinal tracking of learning outcomes under platform versus public modalities and rigorous evaluation of state-level regulatory experiments, thereby informing an evidence-based national architecture capable of reconciling technological opportunity with educational justice.

VI. RECASTING EDUCATION: FROM PUBLIC GOOD TO PLATFORM COMMODITY

The rise of private tutoring platforms in India has crystallized a profound transformation in the purpose and governance of education. What was once conceived as a public good—an instrument of social mobility, epistemic equity, and national capability-building—has been increasingly recast as a commodified service optimized for scale, engagement metrics, and investor returns. This study has demonstrated that the Indian EdTech landscape is marked by concentrated market power, opaque algorithmic curation of learning pathways, and a regulatory vacuum that stands in stark contrast to the more mature, rights-oriented frameworks emerging in Western jurisdictions. The result is not merely market distortion; it is the systematic reshaping of pedagogical relations themselves.

a. The Indian Regulatory Deficit and Its Pedagogical Costs

Indian platforms have leveraged regulatory asymmetry—light-touch oversight on data practices, content quality, teacher employment standards, and advertising claims—to achieve rapid dominance. This dominance has accelerated pedagogical commodification: learning is packaged into bite-sized, gamified modules whose value is measured by completion rates and conversion funnels rather than conceptual depth or critical autonomy. Western frameworks, particularly the European Union's Digital Services Act and emerging AI regulatory architectures, together with state-level consumer protection and education statutes in the United States and United Kingdom, treat educational platforms as entities with heightened duties of care. They impose transparency obligations, restrict manipulative design, and increasingly subject algorithmic decision-making to audit. India, by comparison, continues to rely on sector-agnostic instruments that prove inadequate against the specific risks of knowledge monopolization and the erosion of teacher professional judgment.

The consequences extend beyond market concentration. When a handful of platforms mediate access to high-stakes examination preparation for millions of students, they acquire de facto gatekeeping power over opportunity structures. Pedagogical choices become commercial choices. The long-term risk is the atrophy of public educational capacity and the normalization of stratified learning pathways determined by ability to pay rather than civic entitlement.

VII. STRATEGIC RECOMMENDATIONS FOR REGULATORY RENEWAL

- First, India requires a dedicated EdTech regulatory framework that recognizes private tutoring platforms as hybrid entities—simultaneously commercial enterprises and quasi-educational institutions. This framework should mandate pedagogical impact assessments, independent audits of content alignment with national curricula, and clear separation between marketing claims and learning outcomes.
- Second, algorithmic transparency and data fiduciary duties must be elevated to statutory requirements. Platforms should disclose the logic governing content recommendation, personalization, and student profiling, subject to independent oversight bodies with technical capacity. Drawing selectively from Western models while adapting to Indian institutional realities, such duties would constrain extractive data practices without stifling innovation.
- Third, competition policy must be recalibrated for digital education markets. Traditional merger thresholds and dominance tests are insufficient when network effects and data advantages create winner-take-most dynamics. Sector-specific competition guidelines, including limits on exclusive teacher contracts and interoperability mandates, are essential to preserve pedagogical plurality.
- Fourth, teacher professional status and student welfare standards require explicit protection. Platforms should be obligated to maintain minimum conditions of employment for educators and to implement safeguards against excessive academic pressure, especially for school-age users. Public investment in high-quality open educational resources must expand in parallel, ensuring that private platforms complement rather than substitute the public system.
- Finally, international regulatory learning should be reciprocal rather than unidirectional. Indian policymakers can adapt Western transparency and accountability tools while contributing insights from a high-volume, high-stakes examination culture that Western systems have not fully confronted. Multilateral dialogue on cross-border EdTech services and data flows will become increasingly necessary.

Toward Epistemic Sovereignty

The ultimate stake is epistemic sovereignty: the capacity of a society to determine the purposes, methods, and distribution of knowledge. Unchecked EdTech monopolies threaten to externalize that capacity to private platforms optimized for capital accumulation. A robust, anticipatory regulatory regime—grounded in the recognition of education as a foundational public interest—offers the most viable path to reclaim pedagogical agency while harnessing technology's genuine potential. Without such a regime, the commodification of learning will continue to outpace the institutions meant to govern it, with consequences that extend far beyond the marketplace into the civic and intellectual fabric of the nation.

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