

PwC Middle East Education sector capability statement

September 2015





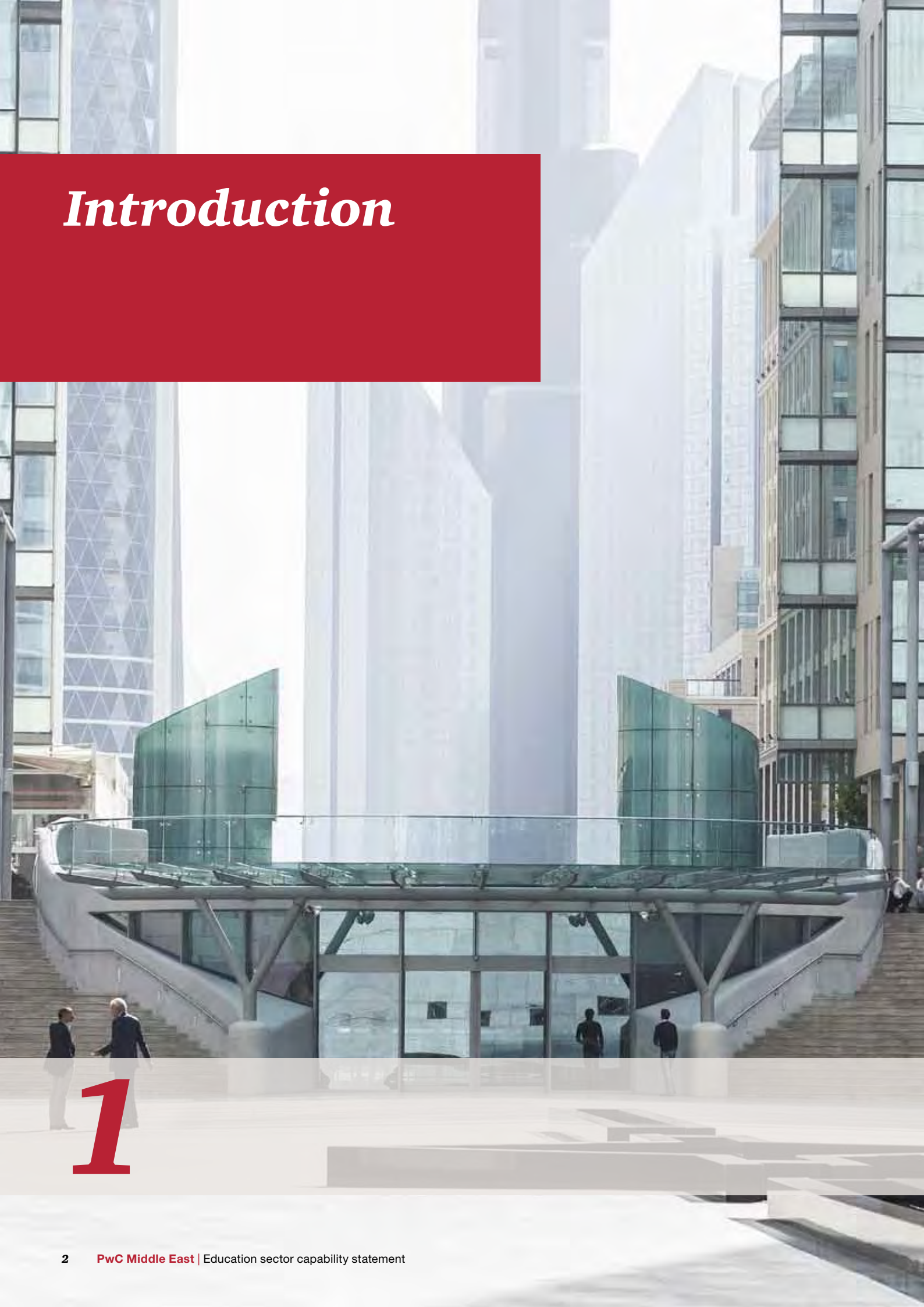


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Introduction



PwC's Middle East education practice



Global, regional and local education expertise

- PwC works nationally and internationally in the education sector with private and public sector providers, regulators and funding agencies. We have a team of dedicated education specialists who bring together our knowledge, expertise and experience. We offer deep strategic and operational expertise in all the key sectors, from primary and secondary through to vocational and higher education
- In the Middle East, we work with governmental and regulatory organizations, in addition to a wide range of large employers and private sector investors. Our practice works alongside other PwC lines of services such as: corporate finance, risk and audit, capital projects & infrastructure, and HR and change management, to deliver strategy through execution projects. We have developed some niche areas of deep expertise including: medical education, how Arabs learn, STEM education, innovation and entrepreneurship
- The global education practice is particularly strong in the UK, USA, Australia and Canada, and advises international bodies such as the World Bank and the European Commission as well as supporting some of the leading universities, colleges and school networks. We have an unparalleled higher education network; we audit over 200 universities globally, eight of which are in the world's top ten on both the Times Higher Education '2014 World University Rankings' and Shanghai Jiao Tong University's '2014 Academic Ranking of World Universities (ARWU)'. In the US, PwC audit seven of the eight Ivy League institutions
- We provide advisory and assurance services including: sector strategy, reform and policy development, quality inspection and fee regulation, strategic planning and implementation for new education institutions; curricula design and programme accreditation; operational efficiency; education technology, market entry strategy and expansion planning. We also have the resources to conduct in-depth research into education sector issues such as labour market readiness and national curricula reform
- We also have our own training institutes operating in the Middle East:
 - **MEPSI (Middle East Public Sector Institute)** – provides customised and standard training and research services
 - **The PwC Academy** – provides training leading to international accounting certification



Sally Jeffery

Education Practice Partner

Sally has over 20 years of consulting experience focused on sector expansion and reform, strategic planning, governance, performance improvement and partnering models.

She has worked extensively in the education and healthcare sectors, with both public and private institutions. Her experience spans the US, Europe and most of the GCC markets.

Sally is supported by an outstanding delivery team of education sector specialist consultants and a network of senior international academic experts in higher education, vocational education, schools and children's services.



PwC is one of the world's largest networks of professional services firms

- The firms of the PwC global network (www.pwc.com) provide industry-focused assurance, tax and advisory services to enhance value for our clients. More than 195,000 people in 157 countries across the PwC network share their thinking, experience and solutions to develop fresh perspectives and practical advice
- Our service offerings have been organised into Lines of Services, with highly qualified, experienced professionals, who have industry specific experience and focus. The diagram below summarises our key service offerings

PwC Middle East Client Lines of Service

Consulting

- Consumer Industry Products & Services
- Education
- Financial Services
- Government
- Healthcare
- Oil & Gas

Deals

- Financial Due Diligence -FDD
- Valuation & Economics -V&E
- Corporate Finance -CF
- Forensics
- Business Recovery Services – BRS
- Strategy

Assurance

- Internal and external audit
- Capital Markets & Accounting Advisory Services
- PwC Academy

Tax

- Local and regional and international tax advice
- Legal services

Strategy&

- Strategy consulting by sector and industry
- Formerly Booz and co





“One region, one firm” across the Middle East



12
countries

23
offices

4,000
+ staff

5,589
Clients

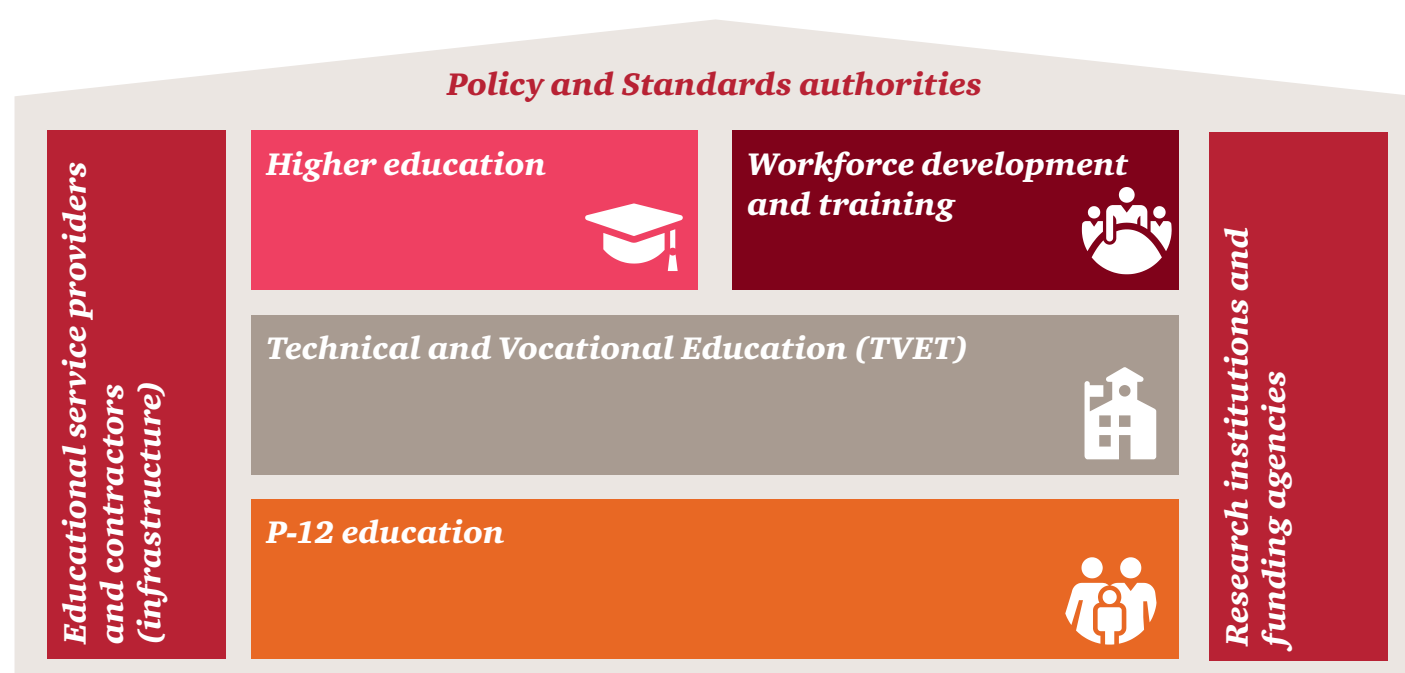


We provide the full range of PwC capabilities across all education segments

Our services

Deals and financial feasibility	Strategic planning	Research studies
Operating model and partnering strategy	Market assessment	New institution project management
Governance and risk management	Enrolment management	Educational and institutional technology
Institutional licensing and program accreditation	Program and curriculum development	Academic planning and quality assurance
Education delivery and implementation	Operations and performance improvement	Facilities and infrastructure (campus planning)
Organisational design and development	Tax and audit services	Legal services (Government policy/regulation)

The sectors we work in





Our propositions

2

A smiling woman wearing a black hijab is the central focus of the image. She is looking directly at the camera with a warm expression. The background is a blurred, bustling market scene with various people and colorful items, suggesting a vibrant, everyday environment. A red rectangular box is overlaid on the top left, containing the text 'Institutional implementation'.

Institutional implementation

2.1



We work with clients across the region and internationally to create world-class P-12, higher education, vocational, and research institutions from strategy through execution



Feasibility Studies (market assessment, needs analysis, benchmarking, financial viability analysis)



Strategy (strategic planning, business planning, market entry and growth strategy)



Programme design and accreditation (localisation of internationally accredited course content and pedagogy, curriculum development)



Faculty and student affairs (Faculty management, student experience, support services)



Partnerships (technical and delivery partnership identification and management, stakeholder engagement for improved outcomes)



IT systems (Administrative and Academic, digital learning strategies)



Governance and organisational effectiveness (Committee structures, funding models, HR planning, performance management)



Regulations and licensing (Quality and fee regulation, risk management – safety and health, environmental security, building/land designation)



Land and facilities (plot size, built up area, land use, area per student, campus experience, master campus planning)



Communications (marketing, student recruitment, outreach strategy)



Finance and business modelling (revenue, Opex, Capex, ROI etc.)



Operational Effectiveness (policies, procedures, outsourcing, administration, KPI monitoring)

Example credentials

Client	Overview
Ministry in The United Arab Emirates	PwC is working with a UAE Ministry to establish a new Diplomatic Academy offering post-graduate degree programs to aspiring diplomatic corps members, as well as a series of executive training courses and research capabilities in foreign policy. PwC is managing the entire process of program design in partnership with Johns Hopkins School of Advanced International Studies, through to implementing the full range of institutional operational capabilities.
Major Police Agency in the GCC	PwC was engaged with a major police agency to assess, benchmark, and develop improvement plans for its Police Schools. PwC partnered with the UK College to deliver the assignment. A tailored school assessment framework was applied to evaluate the school, covering both internal and external stakeholders. The school was benchmarked against 11 international leading police schools.
Major Transport Authority in the GCC	PwC was engaged by a major transport authority to conduct a feasibility study for setting up an Academy for transport related training and degree programme delivery, as well as a research institute. This engagement involved benchmarking global and regional equivalent transportation organizations and tier 1 universities, market attractiveness and recommendations on viable operating and partnering models for the Academy.
National University in the GCC	PwC, in partnership with Stanford Research Institute (SRI) and faculty from Stanford University and University of California San Diego Medical School, are currently designing and planning for the implementation of a new national university with a strong multidisciplinary focus on STEM, entrepreneurship, medicine and research. PwC's education practice are engaged by the Ministry of Higher Education and are responsible for: strategic and financial planning, academic programs roll-out and accreditation, research agenda and framework, student segmentation and targeting, foundation programs design, stakeholder engagement and communications planning, governance and organization structure, facilities planning and university culture. Other PwC specialists are also developing and delivering IT infrastructure, HR planning, financial modelling, and all administration requirements. The university is due to open in 2018.



<i>Client</i>	<i>Overview</i>
<i>A Top-tier U.S. University in Oman</i>	PwC conducted a feasibility study for a university branch campus in Oman. On a subsequent assignment, PwC assessed the university's development of a Medical Center and a College for Health and Rehabilitation Services in Abu Dhabi.
<i>Leading University in Kuwait</i>	PwC was engaged to conduct a benchmarking exercise, covering various indicators. The purpose of this was to assess University's current capabilities and assist the executive management to identify areas of optimization. PwC benchmarked the cost of operations against leading global universities.
<i>Leading College in Kuwait</i>	PwC was approached to develop a fully operating MIS system and assist in documenting all of the College's operations. PwC was asked to review current policies, processes, procedures and reporting for business functions and identify gaps and areas for improvement. PwC is also now assisting the College in developing its 5-year strategy in response to new opportunities and new competition.
<i>Major Foundation in the GCC</i>	PwC was contracted by the Foundation to develop a business plan to set up a regional business management institute in partnership with international tier 1 universities. PwC also worked closely with the Foundation to develop a five year strategy for a single university offering postgraduate qualifications.



An aerial photograph of Dubai, United Arab Emirates, showing a mix of modern skyscrapers in the background, mid-rise commercial buildings in the middle ground, and a large, well-maintained park with a winding road and palm trees in the foreground. The water of theDubai Marina is visible at the bottom of the frame.

School quality improvement and regulation

2.2



We understand the challenges facing education systems in the Middle East and we recognise the clear characteristics of some of the world's most successful systems

Some of the challenges in the Middle East

Quality gaps between private and public schools:

Learning gaps between private and public schools, such as English language provision and access to Higher Education.

Nationals studying abroad and range of curricula:

There is a clear need and drive to give nationals better skills and improved outcomes wherever they choose to study.

Lack of school places:

Supply is not keeping pace with the increasing demand for quality, predominantly private, education from locals and expats alike. This is driving up school fees.

Reaching assessment targets:

Stretching PISA/TIMSS and other assessment goals are in place, with insufficient focus on whole pupil development.

Quality of Arabic language and civic/national education:

Balancing the emphasis on Arabic language, religion and culture teaching with multicultural, globalized curricula and quality is leading to new models of delivery.

Local teachers:

Attracting and retaining high quality local teachers that local students can relate to and meeting nationalizing agendas has proven difficult.

A number of characteristics have been identified from successful global education systems

High quality leadership and management:

- Professionalised management and highly qualified leaders
- Independence for schools and leaders

Outstanding teachers:

- Attractive salaries and benefits
- Appropriate teacher training and development plans
- Supportive, collaborative, organized and safe environment
- A focus on the quality of education courses at universities
- Rigorous standards for entrance into the teaching field

Clear regulations:

- Challenging but fair curricular standards
- Clear expectations for teachers in terms of outcomes and processes
- Open and clear policy development

Clear and fair evaluation:

- Clear and consistent expectations for evaluation of students, teachers and management
- Linkage between evaluation and improvement policies, and fee increases



Example credentials

Client	Overview
Governmental Education Agency in Qatar	PwC supported reviewing the private schools fee regulation and implementation. The project aimed at creating an interim fee increase assessment framework including financial and performance metrics. The framework was implemented on 144 schools and recommendations made for the clients final award decisions. A permanent framework was developed to cater for long-term strategic directions.
Educational oversight entity in The Kingdom of Saudi Arabia	PwC developed international benchmarks and a costing model for the delivery of evaluation and quality improvement services for public and private schools in the Kingdom. The work has helped the client to analyse the services it wishes to provide as a new government entity and understand the process involved in bringing global leading practice to bear on the local context in KSA.



A photograph of the Dubai skyline featuring several prominent skyscrapers. On the left is the Burj Khalifa, a tall, slender tower with a curved facade. In the center, a tall building is under construction, with a large orange crane extending from its top. To the right, another skyscraper with a distinctive circular top is visible. The sky is clear and blue.

Market entry and growth strategy

2.3



There is a clear case for investment in education in the GCC. But where to start and how to expand?

A clear case for investment:

A growing population

The 3–18 population in UAE, KSA, Qatar and Kuwait is forecast to rise by one million by 2025.



More expatriates

Ex-pat families are looking for international curricula, as their access to public schools is limited.



Pressure on infrastructure

Governments are encouraging private sector participation to alleviate the burden.



Shifting preferences

A shift of Nationals from the public sector into the private education sector can be seen in falling public school enrolment.

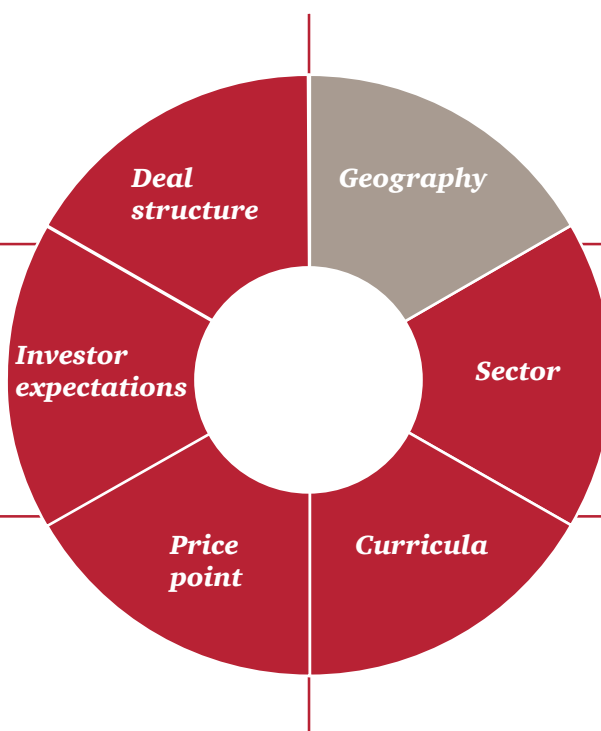


Where and how to enter?

- Topco
- Management
- Operations
- Construction
- Land purchase/lease

- Provision type
- Legacy
- Return on investment
- Exit strategy
- Greenfield or acquisition
- Structure and involvement

- Premium
- Mid market
- Low fee
- Public Private Partnership



- Regulations
- Demographics
- Supply and demand
- Government attitude
- Cultural/legal

- Day care/Pre-K
- K-12
- Vocational
- Higher education
- Teacher training
- Ed tech
- Testing
- Publishing

- Specialised
- International
- Local
- Combined
- Licensing and accreditation



Example credentials

Client	Overview
Feasibility study for a public joint stock company under incorporation	Feasibility study on the firm's potential business plan. One part concerned a market feasibility report presenting information on the private education sector in the UAE, supply and demand for private schools in Dubai and Abu Dhabi, and a suggested portfolio of schools and potential broader opportunities for expansion in the GCC. There was also a financial feasibility showing expected capital expenditure outlays, revenues from the development of school campuses and profiled returns over 10 years.
GCC private investor K-12 premium school feasibility study	PwC's study included primary research on gaps in K-12 school provision in the GCC, and attitudes towards introducing a high-discipline school concept. PwC also developed a financial feasibility model and business plan to support identifying operating partners and applying for an operating license. In a second phase, PwC assisted the client identify operating partners from top tier schools in the UK.
International K-12 Operator	PwC was engaged to assess market attractiveness in six identified countries, and to recommend viable school models for each market. PwC developed a market entry strategy and high level roll out plan for each market by analysing market dynamics for each market, defining a strategy that would be successful in these markets and defining operational imperatives and actions required to successfully execute the recommended strategy.
Feasibility analysis for private schools in The Kingdom Of Saudi Arabia	PwC was engaged with a private sector investment agent who is looking to build 4–6 high end private schools in KSA. Our client will work with an international schools operator to deliver international curriculum in the schools and have asked PwC to conduct analysis to provide evidence to support their business planning. PwC assessed site locations for the planned schools, competition for places in each area, market sizing and demographic trend analysis.





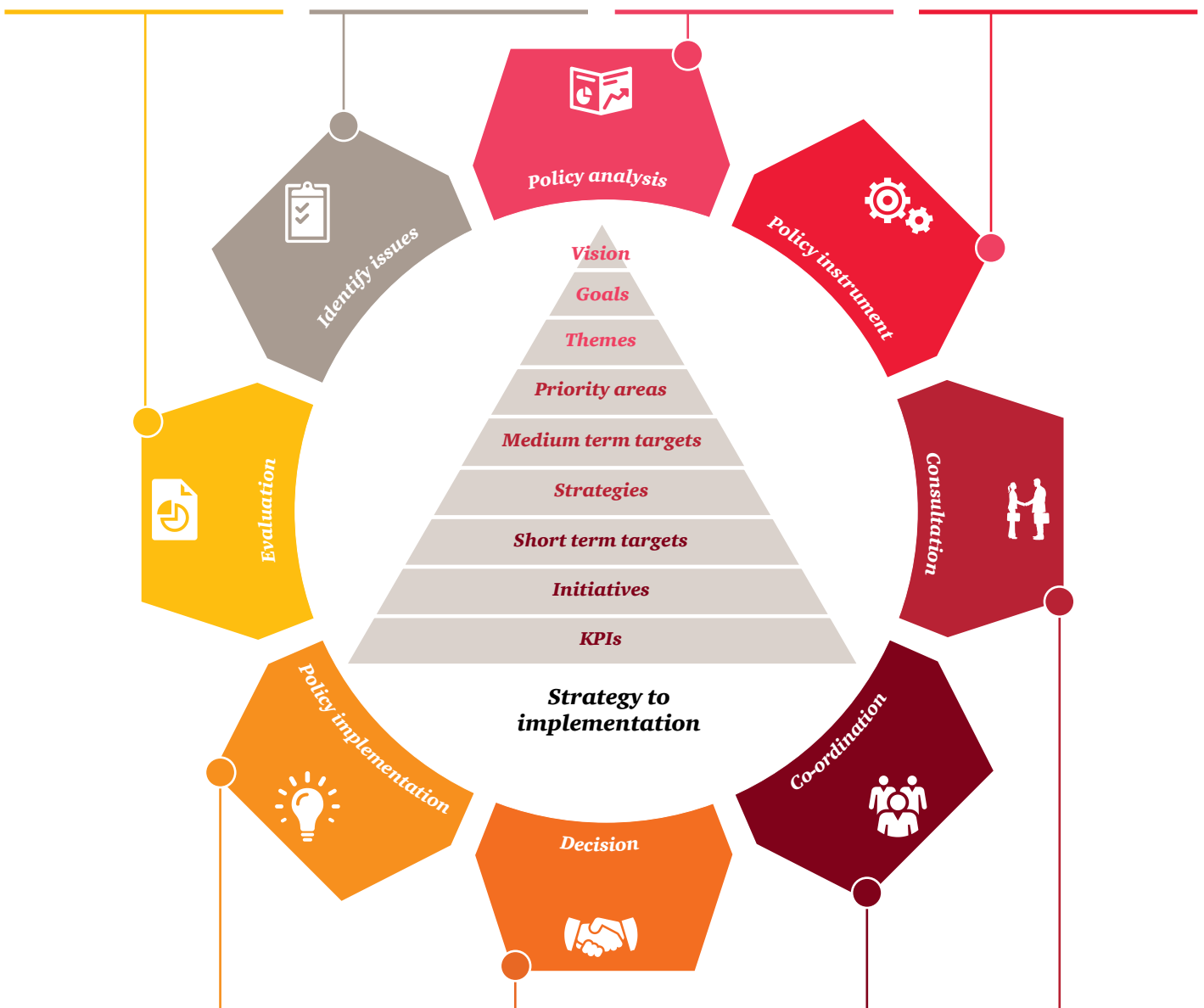
Strategy and policy development and implementation

2.4



We deliver strategy through execution for government and private clients and across the entire policy cycle

- Assessing the implemented policy
- Finding unintended consequences of new policies
- Identify problems that require action
- Defining nature of problem
- Determining which policy will achieve goals
- Regulatory instruments (laws and regulations)
- Economic instruments (fees, subsidies etc.)



- Employing the right parties to take responsibility for implementation
- Making sure policies are carried out as planned
- Choosing a specific path over another
- Coordination between e.g. local federal government
- Consulting stakeholders

Example credentials

Client	Overview
Major GCC education non-profit organization	PwC worked alongside research partners and the World Bank for the ARAIEQ Project “Integrating Entrepreneurship Education in the K-12 sector for the MENA Region”. Outputs included an Entrepreneurship Education Benchmark Report that includes 238 global entrepreneurship initiatives across 7 countries; and Entrepreneurship Education Strategic Considerations report containing policy recommendations and an integration framework for regional ministries of education.
Large non-profit organization in the United Arab Emirates	PwC developed a report based on a survey of 600 Arab CEOs from 18 countries and 12 sectors, to understand the challenges CEOs face in recruiting local talent. The report highlighted the gap between market need and capacity and provided a set of recommendations for the education sector.
Government Agency nurturing the next generation of Emirati women leaders	PwC was brought in to conduct mixed (qualitative and quantitative) research on Emirati women not in the workplace to identify decision making barriers and analyse the obstacles being faced by them in terms of economic participation. The search report also helps construct and target projects and initiatives to adopt non-participating women into the workforce.
Non-profit organization focusing on developing Young Arab Leaders	PwC developed the strategy for the organization, focusing on education, entrepreneurship, leadership and dialogue exchange. Furthermore, PwC helped the organisation in the design and delivery of their annual forum.
Independent government healthcare agency in the Kingdom of Saudi Arabia	PwC was engaged to produce a five year strategic business plan for the agency responsible for classification, registration, regulation and CPD training of all healthcare professionals in Saudi Arabia.



Client	Overview
Local education government agency in Abu Dhabi	PwC worked on an assignment to formulate strategic objectives, design the organizational structure and develop the Human Resources and Financial policies and procedures. PwC also developed a funding model for the higher education institutions arm of the agency, which was based on comprehensive international best practice research into cost and revenue drivers.
Ministry of Education in the GCC	PwC was engaged by the Higher Education division of the ministry to design a 10-year higher education strategy for the country. The strategy included thematic and functional objectives stressing on the need to balance access, quality, and affordability, while addressing key challenges facing the sector including the employability of graduates, diversity of the offerings, alignment with national priorities, and potential for attracting international students. Additionally, PwC addressed institutional and regulatory arrangements necessary for strategy implementation.
Ministry of Education in the GCC	<p>PwC was engaged with the ministry to assess its strategic plan, recommend the necessary changes, and develop a new strategic planning process framework.</p> <p>The ministry also asked PwC to establish a Strategic Program Management Office (SPMO), and develop the SPMO competency framework and tools. PwC was assigned to train the SPMO staff and work with them hand-in-hand for 12 months to develop their skills, enhance the internal capabilities of the ministry, and ensure that the knowledge transfer is successful.</p>
Labour governmental agency in the Kingdom of Saudi Arabia	PwC developed a national vocational training program strategy and PPP operating model for the Strategic Partnership Program (SPP). The SPP focuses on training partnerships for short courses predominantly in the services sector. PwC's work also included: research into qualified training providers, global benchmarks and standards research, development of a life skills (workforce readiness) program strategy, as well as guidelines for employing women.



Education digital transformation



2.5



Digital strategy

Know your constituents and your ecosystem

We help you understand the current status of your digital services and your constituents expectations, consumption and potential

Protect your institution from the risks of the digital services

We help you quantify the value of the digital assets you increasingly rely on, and protect you from the risks associated with online security and cyber crime

Accelerate your usage of technology in teaching and learning

We help you accelerate the adoption and usage of learning technology in your teaching and learning

Define what your success looks like

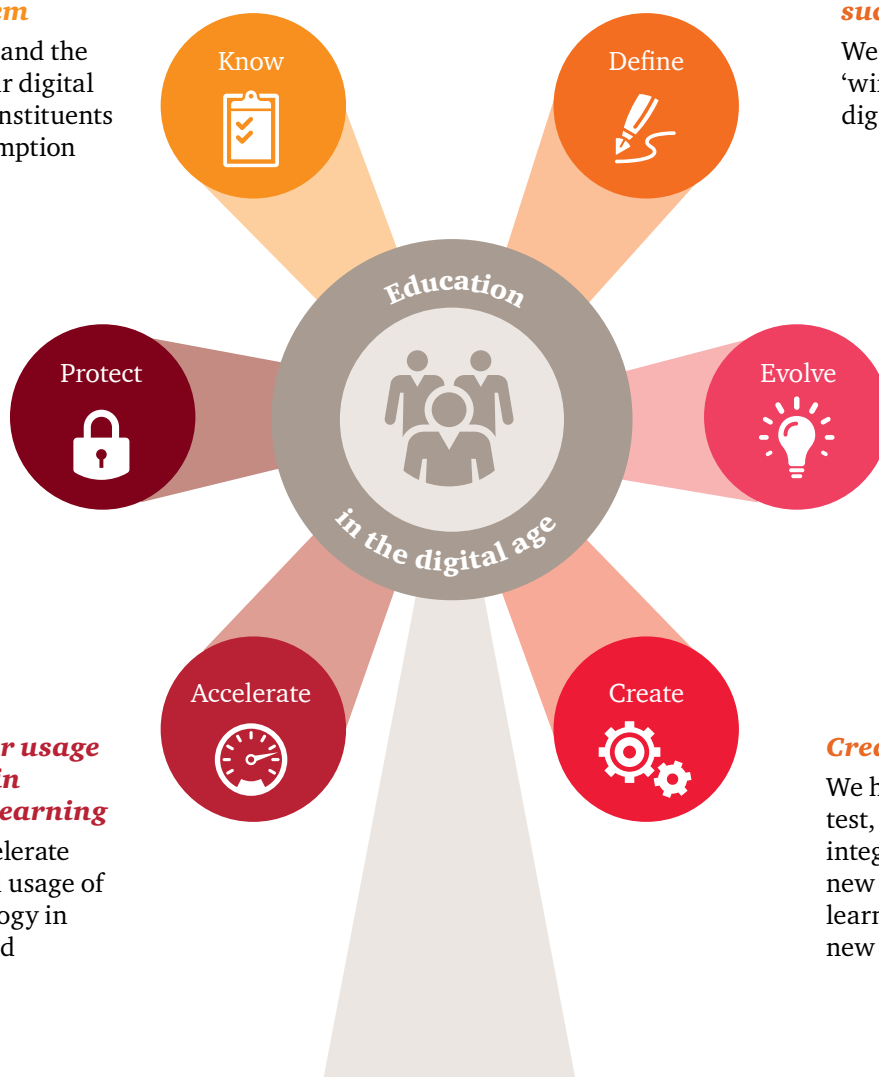
We help you define your 'winning play' in the digital age

Evolve your institution digital experience

We help you evolve your institution digital experience

Create new value

We help you generate, test, implement, and integrate new technology, new teaching and learning methods, and new digital services



Global, regional and local education expertise

Stage 1:

What is your current status?
How do you measure up globally?

Stage 2:

What are the opportunities and what do we need to change?

Stage 3:

What is the roadmap for change?



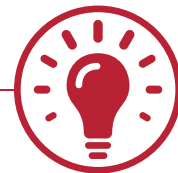
Example credentials

Client	Overview
Governmental Smart Learning Programme in the GCC	The client was seeking the assistance of a professional services firm to obtain appropriate personnel to create a PMO, using industry best-practice, proven methodologies, governance and reporting, while complying with local regulatory requirements and organizational practices. The ultimate objective was to both establish, as well as operate, a Project Management Office for 24 months. PwC's approach was mobilizing our professionals with extensive experience in project management practice, who were responsible for PMO operations, management, control and administration. PwC professionals operated the PMO plan to monitor and supervise the successful implementation of the clients' strategy, as well as conducted PMO periodic QA reviews to provide feedback on the overall delivery for effective projects implementation.
Public transport agency in the GCC	PwC was engaged with requirements to enhance school transportation operations by capitalizing on information assets, deliver smart services to school transportation customers, deliver business insights to support strategic goals and sustain relationships with the clients partners and stakeholders by delivering services to their customers.
Major telecommunication Company in the Kingdom of Saudi Arabia	PwC developed a benchmark report on the newest trends in the integration of e-learning in higher education and in up-skilling and re-skilling the workforce. The report included the opportunities, challenges and relevance to the MENA region.
Labour governmental agency in the Kingdom of Saudi Arabia	PwC develop the first regional workforce enhancement portal for KSA. The Portal was comprised of a competitive online virtual market between e-learning vendors and learners through a voucher system sponsored by the government to enhance workforce skills for up-skilling and re-skilling new job market entrants and existing workforce.

A photograph of a modern building with a glass facade. In the foreground, there is a large, shallow water feature with a person standing on a platform. To the left, there are trees and a curved structure. The text "Our training institutes" is overlaid on a red background in the upper right.

Our training institutes

2.6



MEPSI:

Devoted to serve the Middle East Public Sector



PwC Middle East Public Sector Institute “MEPSI”

Background

The Middle East Public Sector Institute “MEPSI” was established in 2010, as a comprehensive Centre of Excellence for Thought Leadership and a Learning and Development institute dedicated to **human capital performance improvement** in the Middle East region.

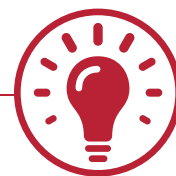
Purpose

Over the past few years, **the Middle East has experienced significant social and political changes** that have directly influenced the public policies of countries and governments in the region. As a response to these strategic changes and as part of **PwC’s commitment to support the transformation**, the Middle East Public Sector Institute (MEPSI) was established **to partner with government entities, public organisations, and public private partnerships** to equip their cadre with business, professional, and technical skills necessary to cope with the evolving changes through offering distinctive services, utilising andragogy and public sector knowledge and research.

Approach

Through **applying innovative and flexible learning methods, processes, and a network of educators**, MEPSI helps its partners in achieving their human capital developmental goals and aspirations. We work closely with leading international and regional thought leaders and are uniquely placed to benefit from PwC’s extensive expertise as well as latest insights gained from strong relationships developed through **working with government and public sector organisations across the globe**.

“The Institute’s driving focus is to become the leading regional learning and development (L&D) solution provider and research centre dedicated to the public sector”



PwC Academy

Creating value for our clients, people and communities in a changing world

PwC's Academy is the educational business of PwC. Our goal is to help improve the knowledge, skills, competence and expertise of people in finance and business; to help organisations across the region grow and retain their talent. Our foundation is our team of expert professionals who convey their wealth of knowledge and the practical experience they have gained within leading organisations around the world.

PwC's Academy is committed to supporting the sustainable growth of local talent across the region. Our expanding Academy currently operates across the Middle East from seven countries: UAE, Oman, Egypt, Lebanon, Jordan, Qatar and Kingdom of Saudi Arabia. PwC's Academy in the Middle East is part of a growing network of Academies present in over 30 countries worldwide. We offer a variety of training courses, based on the best practices of PwC Global and the individual experiences of our experts. We constantly adapt our courses to meet the needs of modern business, customising them to our clients' requirements and assisting our clients in reaching their organisational training and strategic objectives.

PwC's Academy's global network of professionals sets us apart from other providers. We communicate constantly, exchange best practice, ideas and experience. We take this knowledge and evolve our courses to meet the ever-changing needs of modern businesses and their people in the region; this way we make sure that we are providing the very best training programmes for our clients, our students and sponsors.

Our capabilities at a glance

<i>Business and finance</i>	<i>Taxation</i>	<i>Banking and financial markets</i>
<i>Financial awareness</i>	<i>Assurance and audit</i>	<i>Financial reporting</i>
<i>Leadership and personal development</i>	<i>Corporate Governance</i>	<i>Mini MBA</i>
<i>Professional qualifications</i> (ACCA, FIA, CPA, CFA, CMA, CIMA, CIA, ICAEW, ASC, DipIFRS)		

Thought leadership



3



Thought leadership



Building digital trust in higher education

Such is the speed of technological advancement that organizations in all sectors are struggling to keep pace with demand. Whilst cyber security is the 'hot topic' on the radars of most university councils, the pace of change in technology and the education sector itself means keeping up is key not just to thrive but to survive. This briefing draws on key themes which are being discussed around information systems and technology across the education sector.

<http://www.pwc.se/sv/offentlig-sektor/assets/building-digital-trust-information-systems-and-technology-challenges-for-higher-education-institutions.pdf>



Skilled for the future: simplifying the UK skills system

We should see skills as an essential way to improve citizens' lives and wellbeing, providing them with more employment and career options. But does the current system provide the skills that businesses and their future employees need to compete in their markets? This Talking Points publication considers whether the current skills system is really working for its stakeholders and what changes could be made to its administration to make the UK skilled for the future.

<http://www.pwc.co.uk/assets/pdf/skilled-for-the-future-simplifying-the-uk-skills-system.pdf>



Leveraging technology in education

In recent years, a vision to transform, revamp and retool education through technology has emerged and several classrooms around the world are ushering in this new and necessary phase in education. While the potential benefits of effective Educational Technology (EdTech) employment are invaluable, the challenges of navigating this uncharted territory and the high monetary cost of failure at the expense of student learning warrant a close examination. PwC initiated this paper to help the public, specifically school districts, benefit from lessons learnt in other technology projects and our proposed framework for effective EdTech implementation.

<http://www.pwc.com/us/en/about-us/corporate-responsibility/assets/pwc-leveraging-technology-education-2014-paper.pdf>

Thought leadership



Perspectives in Higher Education 2014

In our current edition of “Perspectives in Higher Education,” we have highlighted several of the pressing challenges and the related opportunities facing colleges and universities in the US from a financial as well as operational perspective. We believe the pace of change within higher education will remain robust and embracing change will be imperative. This will require focused efforts by many within an institution. To this end, this edition also provides a glimpse into the future of higher education as it might be influenced by certain global trends (or “megatrends”) identified by PwC’s Board of Governance.

<http://www.pwc.co.za/en/assets/pdf/perspectives-in-higher-education-2014.pdf>



Middle East & North Africa Talent Competitiveness Index 2015

Technological advances, and ever-increasing global interconnectedness have created a knowledge economy which, today, relies more on talent than ever before. In the Middle East & North Africa, where large youth populations are coupled with high unemployment rates, there is an urgent need to understand what skills must be developed and used in order to achieve progress on economic and social goals. This report seeks to examine and present actionable recommendations in six areas where the MENA region must focus its efforts in order to address labour market inefficiencies, develop national talent and ultimately drive long-term sustainability.

<http://www.pwc.co.za/en/assets/pdf/perspectives-in-higher-education-2014.pdf>



Pearl Initiative: Women's Careers in the GCC

The report follows a GCC-wide research programme on women in senior management conducted by the Pearl Initiative in collaboration with PwC, United Nations Global Compact and the Sharjah Business Women Council. The research polled more than 600 senior businesswomen across the GCC and makes five key recommendations for senior management to fully utilise the pool of talent that women in the GCC represent.

http://www.pwc.com/m1/en/publications/documents/pearl_initiative.pdf



Enabling job creation in the Arab world - a survey on behalf of the Arab Thought Foundation

The Arab world is bursting with a young and ambitious population, who rightly have high hopes for the future. Fulfilling these expectations presents the region with a great challenge, not least in creating an environment in which each young person can fulfil their professional potential. This survey covers a host of issues that are pertinent to youth unemployment, and we hope to stimulate fresh debate on this topic by presenting insights from the survey on how regional integration might play a role in addressing youth unemployment.

<http://www.pwc.com/m1/en/publications/enabling-job-creation-in-arab-world.pdf>



Education Matters Fifth Edition

One of the greatest challenges for Canadian education is to continue to provide high quality service, while meeting increasing budgetary restraints and demands. One way to tackle this is by engaging staff to help identify wasteful activities that prevent them from focusing on student needs. This edition of Education matters looks at 'Lean' operational excellence and continuous improvement projects that are helping do just that. The edition includes interviews with Dan Florizone (Deputy Minister of Education and Lean, Saskatchewan), Tom Jessome (Lean Project Manager, Mohawk College) as well as PwC partners.

<http://www.pwc.com/ca/en/public-sector-government/publications/pwc-education-matters-fifth-edition-2014-11-en.pdf>



Getting smarter about cities

Being a Smart City is about much more than technology. Planning alongside execution are key to unlocking the potential of smart cities: a road map must be developed before embarking on the smart city journey so cities can prioritise and strategically manage their investments. This report discusses the various elements that contribute to successful smart cities, which are places where new smart technologies are adopted; but also where basic safety, security, and environmental needs are met, the economy is productive, educational attainment and knowledge production thrive, and performance is maximised across all capitals and building blocks.

<http://www.pwc.com/m1/en/publications/smartcities.pdf>

Thought leadership



The 2018 University- making the right choices, making it happen

Higher Education is facing a future that is challenging but also presents more opportunities for innovative organisations than ever before. Universities have a stark decision- make the right choice, embrace the new opportunities and succeed or make the wrong choice and get left behind. This new Talking Points publication considers the challenges universities are facing and how new ways of working will give higher education the choices it needs to succeed in the future.

<http://www.pwc.co.uk/government-public-sector/education/assets/2018-university-making-the-right-choices-making-it-happen.pdf>



Adapt to Survive

Economies survive by continually adapting to the world around them. In countries where a workforce lacks the skills that are suddenly in demand we see a skills gap emerge. Today, talent adaptability is more critical than ever. “Adapt to Survive” for the first time brings together the two most comprehensive sources of talent data in the world: the realtime behaviours drawn from LinkedIn’s 277 million members and employer information from PwC’s Saratoga database of people and performance metrics. The report sets a new benchmark for evaluating a country’s ability to match talent with opportunity and the movement of people between industries – the Talent Adaptability Score and evaluates how the Score impacts economic performance in 11 countries.

<http://www.pwc.com/gx/en/hr-management-services/publications/assets/linkedin.pdf>



18th Annual Global CEO Survey: A marketplace without boundaries?

PwC’s Annual Global CEO survey gives business leaders and governments across the world a unique insight into the vision and decisions of the global CEO. As in past years, we have extended and deepened our research for PwC’s 18th Annual Global CEO survey by including a selection of interviews with senior decision makers in governmental organisations around the world.

<http://www.pwc.com/gx/en/ceo-survey/2015/assets/pwc-18th-annual-global-ceo-survey-jan-2015.pdf>



HE Matters - Spring 2015

In this spring 2015 edition of HE Matters, we have articles considering the VAT minefield when delivering education across international borders, our annual look at the emerging themes from HE Audit Committees, and we highlight potential claims that can be made from Research & Development Expenditure Credit (RDEC).

<http://www.pwc.co.uk/industries/government-public-sector/education/he-matters.html>



Cities of Opportunity - 6

Cities of Opportunity 6 analyses the trajectory of 30 cities, all capitals of finance, commerce, and culture—and, through their current performance, seeks to open a window on what makes cities function best. We also investigate both the urbanisation and demographic megatrends that shape our cities.

Dubai ranks 16th out of 30 in this latest Cities of Opportunities report and performs remarkably well across several indicators, demonstrating the range and depth of its strengths.

http://www.pwc.ru/ru/real-estate/assets/cities_of_opportunity_6_eng.pdf



Putting a value on early childhood education and care in Australia

Too often we measure success or failure on too short a time horizon when we know that the gains that are likely to accrue from high quality Early Childhood Education and Care (ECEC) will be realised over a longer time period. In this context, PwC has undertaken economy-wide modelling to help meet the need for an Australian evidence base around the value of ECEC. This publication models three impacts of ECEC on the Australian economy: the impacts of an increase in female labour force participation, productivity impacts of participation in quality ECEC and the impacts of increasing vulnerable children's participation in ECEC.

<http://pwc.docalytics.com/v/putting-value-on-ecec>

Our team

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Our team



Sally Jeffery
Partner

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Educational background:

- MBA (Honors) The Carlson School of Management, University of Minnesota, USA
- MSc – Applied Psychology, University of Liverpool online (graduation Dec. 2015)
- BA (Honors) in European Business Administration Loughborough University of Technology, UK

Sally joined PwC's ME advisory practice in early 2007. Prior to PwC, Sally worked for over 15 years as a strategy consultant with a Big Four Firm, and has worked extensively across the US and Europe.

Since moving to the Middle East, Sally has focused mainly on strategic planning, market entry studies, organizational re-design and performance improvement, as well as sector regulatory reform. She leads the education team and works with both public and private institutions. Her experience spans most of the GCC markets. Sally has a personal interest in the topic of innovation and has contributed towards various PwC thought pieces on the subject.

Representative assignments include:

- Ministry of Higher Education Oman – Design and implementation planning of a new elite, multi-disciplinary national university focused on science, technology and medicine
- Ministry of Education Kuwait - Development, training and implementation of the strategic planning programme management office for reform in the K-12 sector
- Private school investors - Market entry and feasibility studies for a variety of investors in K-12 schools in the Middle East and developing markets. Including national capacity planning and operating partner search, selection and negotiation
- Bahrain Ministry of Higher Education – Development of a strategic plan for the higher education sector
- Abu Dhabi Education Council - Funding model for higher education. Current state assessment, international best practice research, funding model options analysis and implementation support
- Ministry of Labour/HRDF, KSA - Design and implementation support for the strategic partnerships programme under the HRDF. Developing partnerships with leading employers to expand training and job opportunities for Saudi's
- T4E – Tatweer for Education (KSA) - SME for organisational structure re-design to support reform strategies and initiatives
- Public Education Evaluation Commission (KSA) – development of an evaluation framework for an independent government funded entity responsible for improving K-12 education quality
- Qatar Supreme Education Council – Design and implementation of a private sector school fee approval system, based on international best practice



Chris has 20 years' experience in the education and skills sectors, from both a public and private sector perspective. Chris recently joined PwC from GEMS Education Solutions, which he founded and led. This business provides strategy, school improvement, school design build and fit outs and outsourced school and college management for governments and private school groups across the world. From its Headquarters in London Chris led a team of around 200 consultants, teachers and staff, who are based in UK, US, Africa, Middle East and Asia.

Prior to GEMS, Chris spent 11 years at PwC where he led the UK School Education practice and the Government Strategy competency. Chris' work focused on designing and implementing educational and skills policies and programmes. Previously Chris was in the UK Government's Department for Education and Skills, where he was a graduate of the Civil Service Fast Stream.

Representative assignments include:

- Secured a contract to set up and run three Colleges in Saudi Arabia, which will serve 6,000 Saudi women aged 18-26. This is through 'The Oxford Partnership', a UK-based consortium established specifically for this opportunity
- Established 'Making Ghana Girls Great (MGCubed)'. Funded by the UK Department for International Development, this is billed as sub-Saharan Africa's first Synchronous Distance Learning Platform, in which around 10,000 Ghanaian children in 100 rural schools are taught over a satellite link
- School Leadership Succession Planning for the National College of School Leadership (UK)
- Behaviour Improvement Programme for the UK's Education Department (DCSF)
- Efficiency Reviews of DCSF, Investors in People UK, the Qualifications and Curriculum Authority
- Large scale quantitative research studies: the UK school funding grant; the impact Information and Communications Technology on teacher workload; the 'Salt Review' of UK provision for students with special needs



Chris Kirk

Education: Strategy Lead – PwC UK

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Educational background:

- University of Surrey – BA (Hons)
- Affiliate Member of the Institute of Chartered Accountants
- Inlingua Idiomas TEFL Certified,
- Financial Services Authority Professional Practice Certificate,
- Civil Service Fast Track programme

Our team



Roland Hancock
Director

roland.hancock@ae.pwc.com

Educational background:

- MSc London School of Economics
- BA University College London
- PRINCE 2 accredited Project Manager

Roland is an education specialist working across the Middle East with K-12, higher education and vocational training clients. He leads strategy and implementation projects for both public and private sector clients. An emerging theme in the GCC is institutional development and Roland works with investors, schools, universities and other providers on market assessment and implementation planning for new provision to service the changing needs of young people across the region.

Roland joined PwC ME from the UK where he led the UK schools account and before that worked in college performance management and funding. His experience extends across the public sector with deep education and strategy experience, managing and delivering projects including the development of a new university in the GCC. Before joining PwC, Roland was employed in the public sector first at the Office of the Deputy Prime Minister and then at the Learning and Skills Council (LSC) in the UK. He led on policy areas including college funding, Offender Learning and the Olympics, designing and implementing the LSC's Sustainable Development Programme in London and project and contract management.

Representative assignments include:

- Market assessment and strategy for a new university in Bahrain, assessing employment market student demand and competitive environment to create a compelling concept and moving towards partnership and implementation planning
- Developing a framework for assessing school fee increase requests from private schools in Qatar to provide transparency, parity and a robust methodology for implementation
- Business feasibility and market entry strategies for private sector investors and school operators in GCC and globally. Demand and supply assessments, identifying competitive advantage and managing risk as well as financial models for assessing returns over time
- Assessing and benchmarking a GCC police agency recruit training school against international good practice and providing improvement plans across all areas
- Developing and implementing major public sector initiatives: new inspectorate for a GCC country, Skills legacy planning for London Olympics, reporting on youth employment and social mobility programme implementation for ministers; writing the London regional Offender Learning and Skills Service Strategy and development plan; implementing a qualifications framework for a national skills funding body



Cate has over 12 years of experience of establishing, managing and delivering a wide range of complex projects and programmes across public, private and not-for-profit sectors.

Particular expertise within the education and skills sector in designing programmes and leading change across education Ministries and their agencies, and with groups of schools and colleges.

In addition, Cate has experience in establishing and leading a start-up education services and consulting business which established presence in 11 countries across four continents.

Representative assignments include:

- Ministry of Education, GCC: led the strategy and design for a national Academy for Professional development for teachers and school leaders. This included the transition of existing delivery functions into a new organisation
- Education and Skills Ministry, GCC: design and mobilisation of a \$100m public private partnership to establish 3 women's further education colleges, within a joint venture with two UK colleges. Acted as a strategic advisor to the board
- Ministry of Education, South-East Asia: designed the teacher professional development component of a national teacher recruitment programme, which included both local and international workforce
- Education Agency, GCC: led the development of an organisational blueprint for a new school inspection unit. This design led to similar work for other GCC Governments
- Education Agency, GCC: designed a year-long training programme for new teachers using blended learning approaches. The programme included international accreditation and a train-the-trainer component
- Education Foundation, UK and UAE: led the design and implementation of a low cost, high impact teacher training programme that in its first year trained 9,000 teachers and school leaders in Uganda. The programme has now attracted additional funding, which has enabled it to be trialled through online distance learning, and piloted in Ghana
- National Aid Agency, UK: overall responsibility for the design, implementation and operational delivery of Sub-Saharan Africa's first satellite based, solar powered synchronous distance learning programme, providing maths, English and female empowerment programmes in rural primary schools
- Education Investors, MENA: oversight of a portfolio of school management contracts for private school investors across the Middle East and North Africa, from strategy through design, implementation and operation
- Education Company, India: design and implementation of a chain of mid-market private schools across India



Cate Noble

Education and Skills Consulting

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Educational background:

- BSc University of Durham
- MSc University of Durham

Qualifications:

- Managing Successful Programmes Practitioner



Our team



Hani Abujabeen
Director

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Educational background:

- Postgraduate Certificate in Business Administration, University of Leicester, UK
- BSc Computer Science, University of North Texas, Denton, TX

Hani has over 27 years of experience in Information Technology and Systems Integration. He has spent the last 14 years working on large scale IT projects for the Higher Education sector in the Middle East. He has an extensive experience in ERP solutions, Student Management Systems, Learning Management Systems, University Portals, Business Process Automation, CRM, Business Intelligence, and Enterprise Content Management in the Higher Education sector. Hani has recently joined PwC and he is focused on Technology Consulting for the Higher Education Sector.

Representative assignments include:

- Led the implementation of the Student Management System at 17 Universities in the Middle East
- Led the implementation of ERP at 9 Higher Education institutions
- Led the implementation of eLearning solutions and Smart Classroom technologies at 8 Higher Education institutions
- Led the implementation of CRM, Portal, BI, ECM, and BPM for several Universities in the Middle East
- Developed IT Strategy for Education clients
- Supported Education clients in the implementation of their IT strategies and provide program and project management of key IT projects in ERP, SIS, and eLearning
- Assessed education clients in the acquisition and evaluation of administrative and teaching and learning IT solutions
- Supported education clients in providing IT support services to their constituents which employ industry best practices in IT operation management
- Developed IT business continuity strategies and plans

Notes

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This image shows a full page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page, providing a template for handwriting practice. There are no margins, text, or other markings on the page.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



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