

Understanding Middle East Education

Egypt Country Profile

PwC Education and Skills Practice

First Edition, 2018/2019





Egypt has the largest education system in the Middle East and North Africa (MENA) region

This series of infographics provides a country by country overview of the education sector in the Middle East

In 2016/17, the total enrolment at the K-12¹ level amounted to 20.6 million, while total enrolment at the Higher Education (HE) level amounted to 2.4 million students². Egypt represents an excellent opportunity for investors and education providers looking for growth in the MENA region due to favourable investment fundamentals and conditions which include:

- A sustainable demand for education due to steady population growth, in a culture that has long valued education as the means to social and economic mobility
- An improving macroeconomic setting showing strong signs of recovery
- The Government of Egypt (GoE) actively encouraging private-sector participation to help relieve budgetary strains
- A stable institutional setting owing to the maturity of Egypt's education system³
- A need for investment in bridging skills gaps through vocational training and enhanced higher education offerings

Whilst there is a lot to cover in the Egyptian education system, we have chosen to focus on two main topics in this report:

1. The status of Egypt's education system across its multiple stages
2. The opportunity for growth in private provision

¹ Total K-12 student enrolment in public and private schools. Enrolment at the General Education stages, excluding religious education in the Al-Azharite system and technical secondary education, amounted to 19.4 million

² Central Agency for Public Mobilisation and Statistics (CAPMAS) Statistical Yearbook 2018

³ Egypt has one of the oldest universities in the world (Al-Azhar)

Overview of the Education System

There is a strong reliance on the government as the main education provider in Egypt. In 2016/17, 90% of the total K-12 student population attended public schools and 94% of total HE students attended public universities⁴.

The GoE's Education Strategy in Vision 2030 acknowledges that the system is yet to deliver high quality education which is essential to meet the country's labour market needs and respond to the evolving social and political systems. The Ministry of Education and Technical Education (MoETE) developed an education reform program (2018-30) with a total expected cost of USD 2 billion.

Figure 1: Structure of the Egyptian Education System

		Grade/ Year	Age	National System (Public & Private)	Total Enrolled Students	Key Regulators
		5	22	Higher Education	2.4 million students (2.3 million in public universities, 150 thousand students in private universities)	Ministry of Higher Education (MoHE)
		4	21			
		3	20			
		2	19			
		1	18			
Key Assessments	Thanawiya Amma Certificate: Grade Point Average (GPA) accumulated through 12 quarterly tests between Grades 10-12.	12	17	Secondary	20.6 million students in total: 19.4 million students in the general education system excluding Al-Azharite system and technical secondary education (18.6 million in public schools and 2 million in private schools)	Ministry of Education and Technical Education (MoETE)
		11	16			
		10	15			
	Basic Education Certificate: Grade 9 examination.	9	14	Preparatory		
		8	13			
		7	12			
	Primary Education Certificate: Grade 6 examination.	6	11	Primary		
		5	10			
		4	9			
		3	8			
		2	7			
		1	6			
		KG2	5	Kindergarten		
	KG1	4				

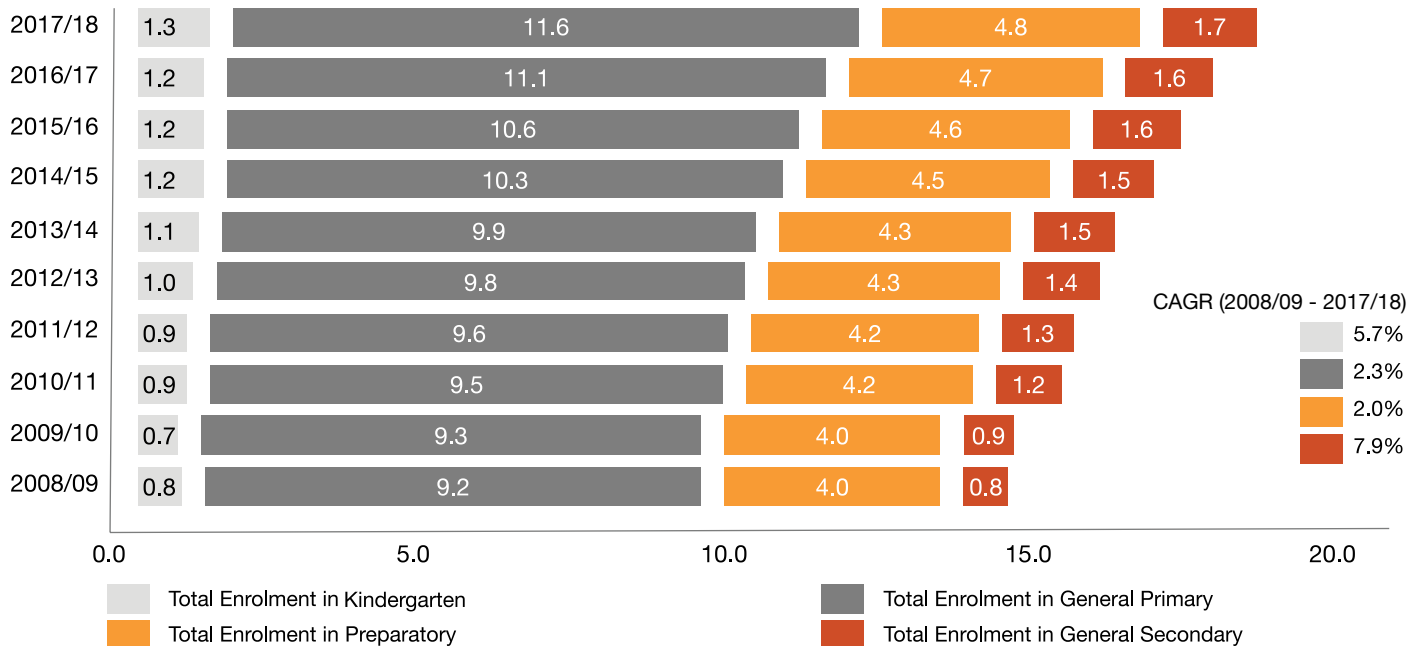
Source: CAPMAS Statistical yearbook 2018

⁴ CAPMAS Statistical Yearbook 2018



Over the last decade, enrolment in Egypt's K-12 education system grew by 32% with a compound annual growth rate (CAGR) of 2.8%. Excluding religious education in the Al-Azharite system and technical secondary education, there are 19.4 million students enrolled in Egypt's general education system. Net enrolment in primary and secondary stages reached 97% and 81%, respectively, well above the global averages of 89% for primary education and 66% for secondary education⁵.

Figure 2: Student Enrolment between 2008/09 and 2017/18 (in millions)⁶



Source: CAPMAS Statistical yearbook 2018

Table 1: The World Economic Forum's Global Competitiveness Report 2017/18, Progress in International Reading Literacy Report 2016 and United Nations Development Programme Human Development Report 2017

Enrolment		Quality	
Indicator	Rank/137	Indicator	Rank/137
Primary education enrolment	33	Quality of primary education	133
Secondary education enrolment	84	Overall quality of the education system	130
Tertiary education enrolment	76	The PIRLS 2016 (Progress in International Reading Literacy Study) Grade 4 results	60 (out of 61 participating countries)
		Human Development Index (2017) ⁷	115 (out of 189 participating countries)



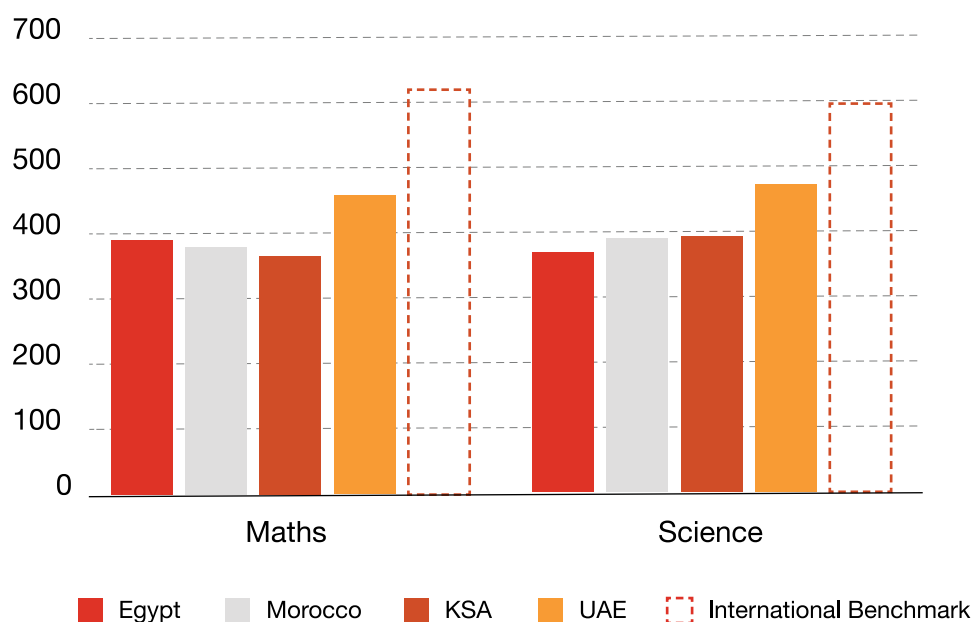
Such rapid growth in enrolment has ultimately affected learning outcomes as it placed increasing pressures on school facilities and in some occasions necessitated the hiring of insufficiently qualified teachers. Moreover, demand for education surpasses the current level of available resources which adversely affects quality of service provision. While Egypt is ranked among top performing economies in enrolment particularly at the primary level, it is consistently ranked amongst the poorest performing economies in education quality.

⁵ CAPMAS Statistical Yearbook 2018

⁶ Student enrolment in both public and private schools, preparatory student enrolment in general, professional and sports education

⁷ Egypt's HDI value for 2017 is 0.696 – which put the country in the medium human development category

Figure 3: 8th Grade TIMSS Maths and Science Achievement in 2015⁸



Egypt's performance in 8th grade TIMSS in 2015, similar to other countries in the region, was poor. The results also showed no significant improvement relative to 2007 results. Only 1 in 20 Egyptian 14 year olds reached a high level of science ability compared to over 50% in many top performing countries in Asia.

Source: TIMSS 2015 International Results in Mathematics Report and TIMSS 2015 International Results in Science Report

The MoETE's education reform strategy aims to improve the above mentioned learning outcomes through the following two approaches⁹:

1. EDU 1.0 which includes a set of initiatives aiming to structurally adjust and reform the existing education system
2. EDU 2.0 which includes a set of bold interventions that aim to improve educational outcomes and modernise the education system to deliver on Egypt Vision 2030 targets

The reform program, which began implementation in the academic year starting in September 2018, adopts modern technology for teaching and learning, student assessment and data collection. Some of the associated interventions include:

- The Egyptian Knowledge Bank: an online library archive that is accessible with national ID and provides educational, research and cultural resources to all citizens.
- Technology based learning: nationwide distribution of one million tablets among 10th grade students, teachers and school directors with relevant content to improve learning engagement.
- Modernised student assessment: the reform program changed the assessment method for national high school (Thanawiya Amma) certificate, which determines the education pathways students will follow - end of year exams at G10-12 have been replaced with a cumulative 3 year GPA. To avoid any potential leaks of exam questions, paper exams will be replaced by electronic tests which improve and standardise student evaluation.

⁸ TIMSS is undertaken every 4 years and therefore provides an important rolling view of how the education system is performing. The next TIMSS test will take place in 2019

⁹ The World Bank, Supporting Egypt Education Reform Project, 2017

Scope for Increasing Private Provision in Egypt's Education Sector

Egypt has a highly subsidised public education system. In 2014, Egypt's newest constitution stretched the years of state funded compulsory education till the end of secondary or its equivalent. This resulted in an increase in annual public expenditure on education which amounted to EGP 107 Billion (USD 6 Billion)¹⁰ in FY 2017/18, compared to EGP 81 Billion in FY 2013/14¹¹. However, public expenditure on education as a percentage of total expenditure declined to represent only 9% in FY 2017/18 compared to 12% in FY 2013/14¹².

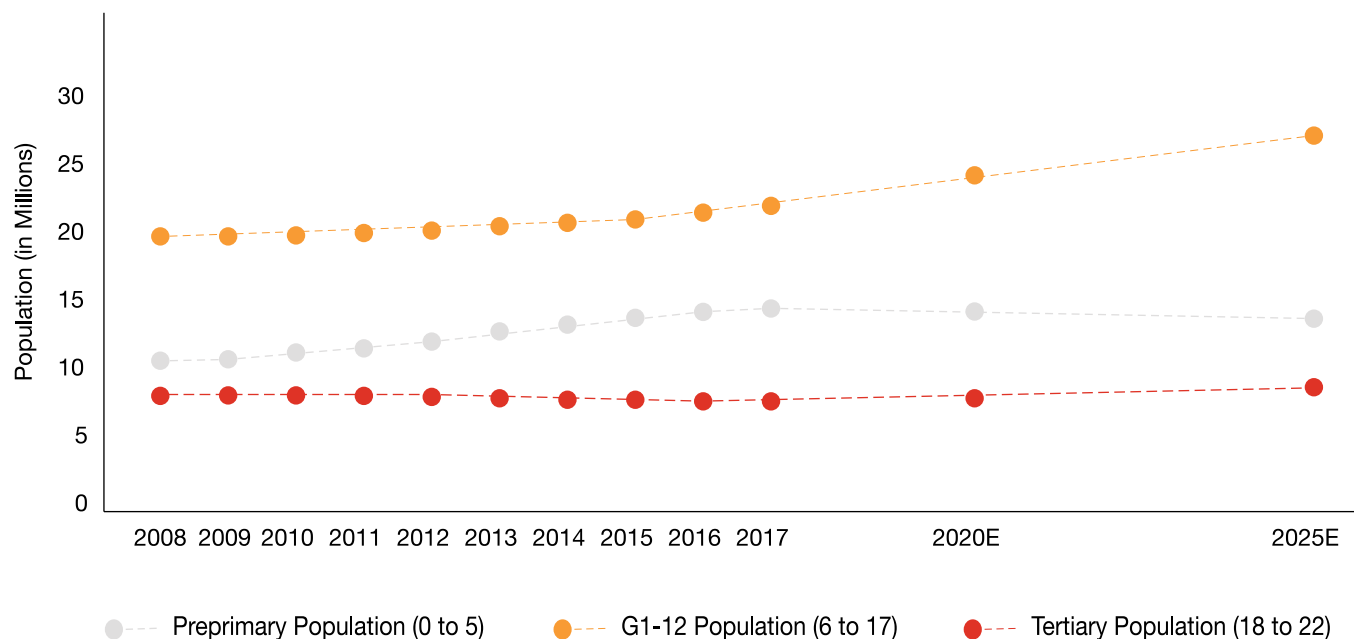
The GoE began actively encouraging private sector participation and investments in the education sector to help relieve budgetary strains. In FY 2017/18 the overall budget deficit represented nearly 10% of GDP, and total public debt reached 109% of GDP in March 2017¹³.

Currently, the private sector constitutes only 10% of total enrolment in Egypt's K-12 education system. Private schools accommodate 24% of kindergarten students, 8% of primary school pupils, 7% of middle school students and 13% of general secondary school students¹⁴. It is anticipated, however, that the provision of private education in Egypt will increase driven by the following favourable investment fundamentals and conditions:

1. A sustainable demand for education due to steady population growth

Egypt has a young and growing population. Over the last decade, Egypt's population grew steadily at an average annual rate of 2.4%. In 2017, 51% of Egyptians were below 25 years old. According to UN data forecasts, the growth trend for Egyptians eligible for G1-12 and HE is forecasted to accelerate over the next decade. Such growth alongside increasing participation will put further pressure on provision.

Figure 4: Egypt's Population by Education Stage (in millions)



Source: CAPMAS Statistical yearbook 2018 and UN World Population Prospects 2017

¹⁰ Based on January 23rd 2019 exchange rates

¹¹ The Egyptian Constitution, 2014

¹² CAPMAS Statistical Yearbook 2018

¹³ The Ministry of Finance, The Financial Monthly Statistical Bulletin, December 2018

¹⁴ CAPMAS Statistical Yearbook 2018

2. An Improving Macroeconomic Setting

In an attempt to address the significant macroeconomic imbalances that Egypt faced since 2011 and restore fiscal and monetary stability, the government embarked on a comprehensive economic reform program. In November 2016, the IMF approved a financial assistance package for Egypt amounting to USD 12 billion. Some of the key fiscal and monetary reform measures undertaken by the GoE are highlighted below.

Figure 5: Fiscal and Monetary Changes in the Economic Reform Agenda¹⁵

Reduction of Energy Subsidies



In FY 14/15, the government launched an energy subsidies reform program which reduced subsidies and fuel prices have since increased multiple times. In November 2016, fuel prices increased by 38% before being increased by an additional 55% in June 2017. A year later in June 2018, fuel prices increased an additional 51%.

Increasing Utility Prices



The government also increased electricity, water and sewage prices. The government iterated its initial plans to phase out electricity subsidies entirely by the end of FY2020/21 instead of FY 2018/19.

Introducing the Value Added Tax (VAT) Law



In September 2016, the government introduced a new VAT law which included the previously exempted services sector and private professionals. The standard tax rate was also increased to 13% in FY 16/17 and 14% in FY 17/18 onwards.

Increasing Customs Tariffs



Customs tariffs were increased in 2016 by Presidential Decree no. 538 for some 'luxury' imports to reach a range between 40-60% which included cosmetics, electronic gadgets and household appliances.

Floating the EGP



The Central Bank of Egypt (CBE) floated the EGP in November 2016 which subsequently led to the currency losing more than 100% of its value versus all foreign currencies. This immediately impacted inflation which peaked in 2017, where annual inflation rates hovered around 30%, before gradually decreasing to reach 11.1% in December 2018. The devaluation also led to a hike in tuition fees, which is expected to increase inbound and decrease outbound university students.

Adjusting Interest Rates

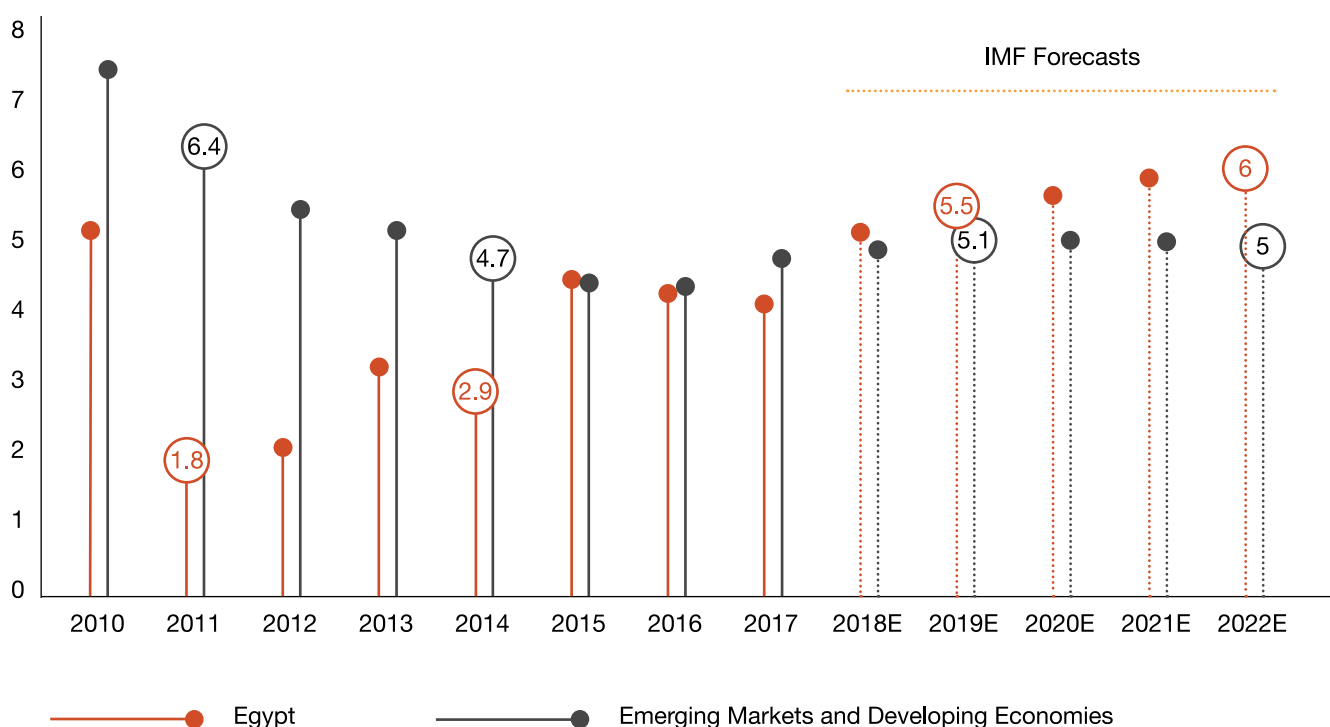


The CBE continued to adjust inflation rates to curb inflation. It increased interest rates on the currency flotation day and persuaded public banks to issue high return investment certificates with 20% interest rates. Interest rates were lowered for the first time since the flotation of the EGP in February 2018 as inflation rates began to adjust.

¹⁵ Data from multiple sources: Reuters, the International Monetary Fund (IMF), Egyptian Electricity Holding Company Annual report 2016/17, The Egyptian Parliament, Central Bank of Egypt, Monetary Policy Committee and Ministry of Finance

Egypt's economy is recovering: the IMF forecasts economic growth to reach 5.5% in 2019 and 6% in 2023¹⁶. In May 2018, Egypt's sovereign rating was upgraded to B from B- by S&P Global Ratings citing strengthening economic growth and rising external foreign exchange reserves. Later in August 2018, Moody's changed the outlook on the GoE long-term issuer ratings to positive from stable. The above-stated economic reforms, however, has an adverse impact on real incomes of Egyptian households and sent inflation soaring. To avoid overburdening the fiscal budget and the potential long-term negative repercussions of inflation on education provision, it is anticipated that the GoE will take the necessary actions to support an increase in private provision in the education sector.

Figure 6: Real GDP Growth Rates and Forecasts



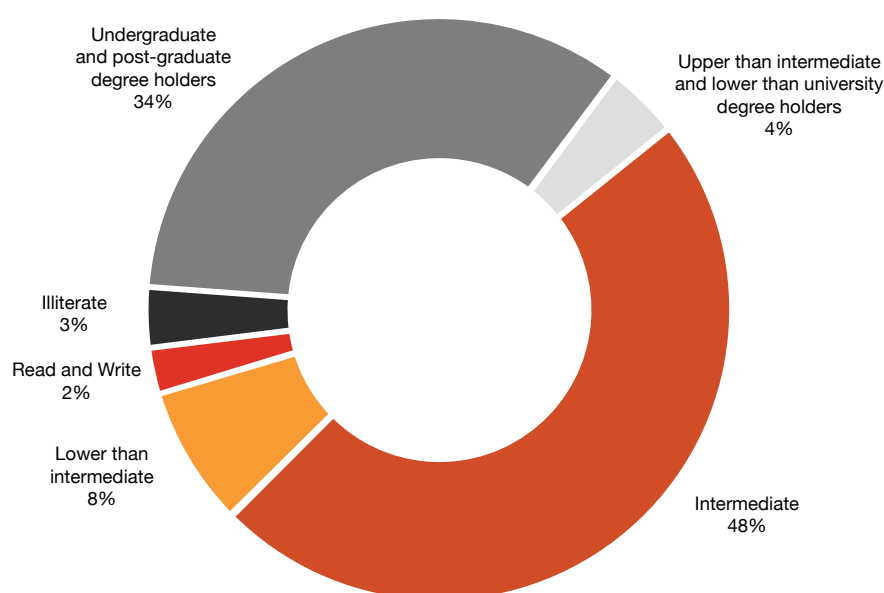
Source: IMF, Egypt Economic Outlook, October 2018

¹⁶ The IMF, Egypt Economic Outlook, October 2018

3. A need for investment in bridging existing skills gaps

Egypt's unemployment rate stood at 10% during the third quarter of 2018, compared to the 11.9% during the same quarter of 2017. Whereas the average unemployment rate amounted to 12% in 2017, it reached 33% for Egypt's youth (15 to 29 years old) during the same year¹⁷. Moreover, the return on investment for HE attainment in Egypt is not guaranteed. As indicated in Figure 6, 34% of Egypt's unemployed in 2017 had received undergraduate or post graduate degrees, representing the second largest unemployment category by educational status. The vast majority of these students, as discussed in detail in the HE section of this report, are enrolled in fields that ultimately prepare them for white collar skill sets. Nonetheless, the demand for employment is increasingly driven by blue collar opportunities. The education system's poor quality, the high unemployment rates and the clear shortage in secure white collar work suggest that Egypt's large supply of graduates are not acquiring the skills required by employers driving this economic growth.

Figure 7: Distribution of Unemployed Individuals by Education Status in 2017



The return on investment for HE attainment is not guaranteed. 34% of Egypt's unemployed in 2017 had received undergraduate or post graduate degrees - they represent the second largest unemployment category by educational status.

Source: CAPMAS Statistical yearbook 2018

Table 2: Students' Perceptions on Skills Acquisition in 2009 and 2014 SYPE

How did you acquire your skills?¹⁸

	2009	2014
Formal Education	14%	12%
Vocational training	29%	14%
Apprenticeship and on-the-job training	42%	61%
Family/self-trained	11%	12%
Other	4%	1%



The students surveyed by the Population Council's Survey of Young People in Egypt (SYPE) in 2009 and 2014 referenced apprenticeships and on the job training more commonly than formal education as a source of skill acquisition.

¹⁷ International Labour Organization ILOSTAT database, 2018

¹⁸ 3,176 and 2,447 Egyptian youth (15 to 29), were interviewed in the 2009 and 2014 SYPE, respectively. Data from the Population Council, Survey of Young People in Egypt, 2009 and 2014



Higher Education

The primary provider of HE in Egypt is the public sector. In FY 2016/17, 94% of total HE students were enrolled across Egypt's public universities¹⁹. Evidence of social and cultural pressures emphasising the importance of obtaining a university degree have been present since the 1950s. This is primarily due to a longstanding public sector employment guarantee for university graduates which was introduced in the 1960s and abolished in the late 1990s.

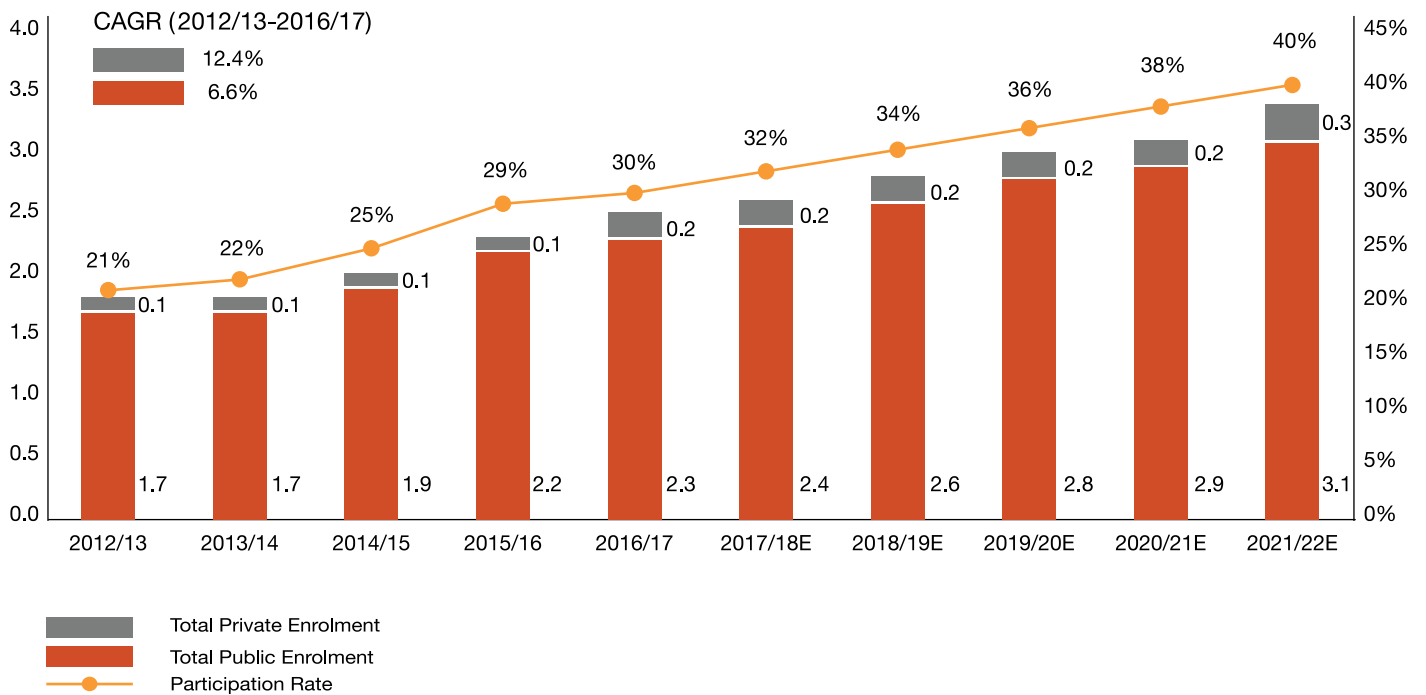
Public universities in Egypt are the largest in the region and free of charge, leaving the institutions with vast resource limitations. The majority of the universities' resources are allocated to current expenditure, rather than capital, which suggests that internal efficiency in HE spending could be improved.

High enrolment rates in public universities along with budgetary caution on capital expenditure suggest that the government will continue to facilitate more growth in the HE private sector's capacity. There is also a need for structural transformation work to improve the performance of overburdened and operationally inefficient public universities, especially given budget limitations. The state funds 85-95% of public universities' budgets, and universities have to raise the rest of the funding themselves - for example from establishing relatively high fee bearing programs with the credit hour system, joint industry partnerships and research projects, etc²⁰.

¹⁹ CAPMAS Statistical Yearbook 2018

²⁰ The Ministry of Finance Transparency Initiative

Figure 8: Trend in HE Enrolment by University Type



Source: CAPMAS Statistical yearbook 2018, PwC analysis



If enrolment trends persist, close to 900 thousand additional students may enrol in HE by 2021/22. The increase is driven by (i) an increase in tertiary aged population by 400,000 and (ii) a continual improvement in HE participation rate.

A law regulating the establishment of International Branch Campuses (IBCs) for foreign universities in Egypt was issued under no. 162 for 2018 and came into force in August 2018. The law aims at facilitating the procedures and streamlining the licensing requirement for establishing a branch of a foreign university. Under this law a foreign university can establish its own branch, agree with an education institute in Egypt to host the branch or enter into a form of partnership with an Egyptian university to grant a joint degree. In addition, according to article 19 of the new law the IBC shall enjoy all investment guarantees stipulated in the Investment Law no. 72 of 2017.

It is worth noting that establishing an IBC in Egypt previously required the conclusion of an international treaty between Egypt and the home country of the concerned university. Moreover, the Private and Public Universities Law no. 12 of 2009 mandated that the majority of the owners of a private university must be Egyptian nationals which used to pose another barrier for foreign universities to establish branches in Egypt.

Figure 9: Top 5 Public Higher Education Institutions by Enrolment in 2016/17

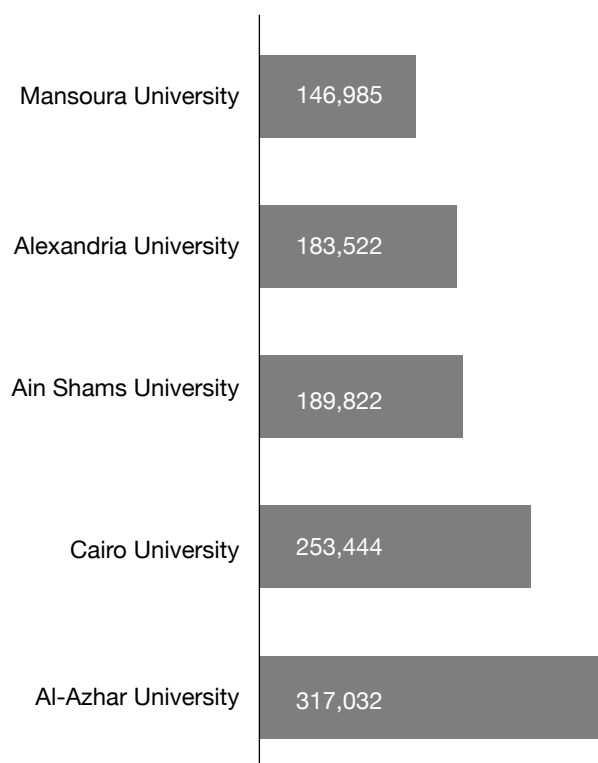
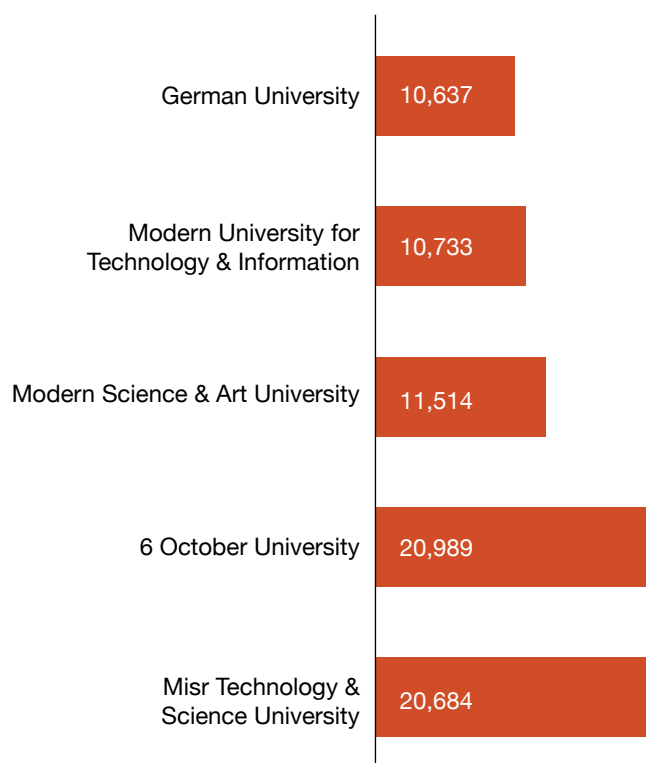


Figure 10: Top 5 Private Higher Education Institutions by Enrolment



Source: CAPMAS Statistical yearbook 2018

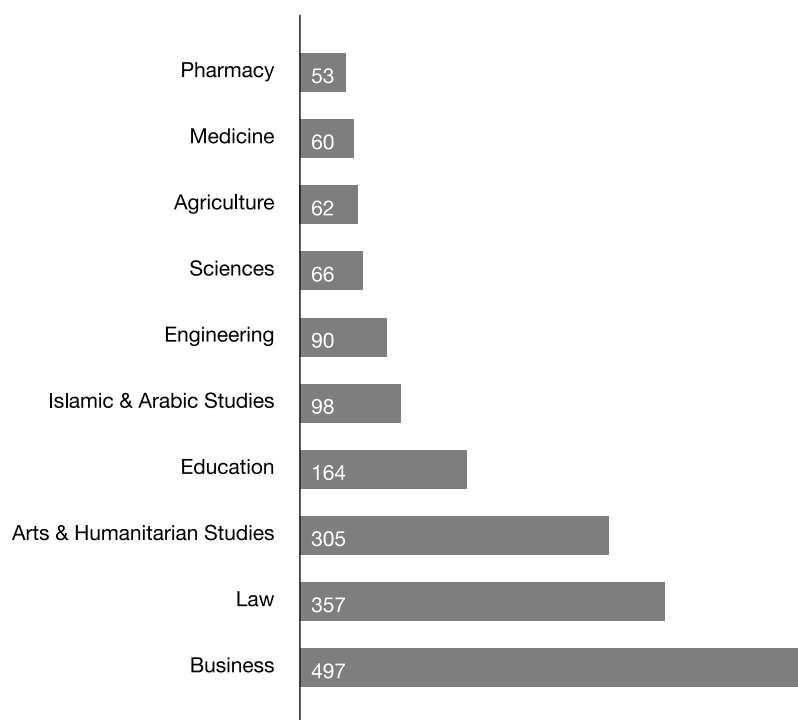
Four universities in Egypt are ranked in the top 20 universities in the Arab Region by QS World University Rankings. Despite a declining trend in its ranking over time, the American University in Cairo (AUC) is the only university in Egypt that is consistently ranked in the top 10 in the region.

Table 3: Egypt's University rankings for the Arab Region in the QS World University Rankings

University	Ranking in 2017	Ranking in 2018	Ranking in 2019
The American University in Cairo	5 th	6 th	8 th
Cairo University	10 th	11 th	11 th
Alexandria University	14 th	15 th	12 th
Ain Shams University	12 th	17 th	13 th

Source: QS World University Rankings 2018 and 2019

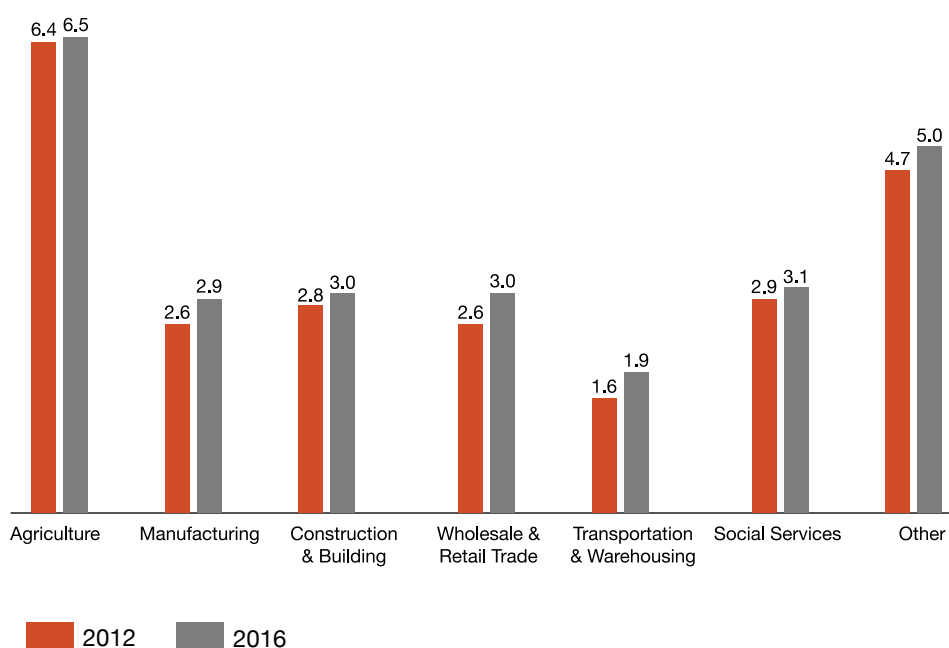
Figure 11: Top 10 Fields of Study in Public Education (enrolled students in thousands)



Comparable to global and regional trends, the highest proportion (28%) of HE students enrolled in public universities in Egypt are enrolled in business courses. 98.7% of Egypt's HE students studying in public universities are enrolled in 10 fields of study, ultimately preparing students with a white collar skill set. Conversely, the demand for employment is increasingly driven by blue collar and low skilled opportunities.

Source: CAPMAS Statistical yearbook 2018

Figure 12: Development in Total Number of Employees per Economic Sector (in millions)



The top three sectors in terms of employment growth, between 2012 and 2016, were wholesale and retail trade (16%), transportation and warehousing (15%) and manufacturing (11%). The agricultural sector on its own represents 26% of total employment.

Sectors with heavy reliance on white collar employment including Telecommunications Finance and Banking, Tourism, Real Estate, cumulatively denoted in the 'other' category, represent only 20% of total employment.

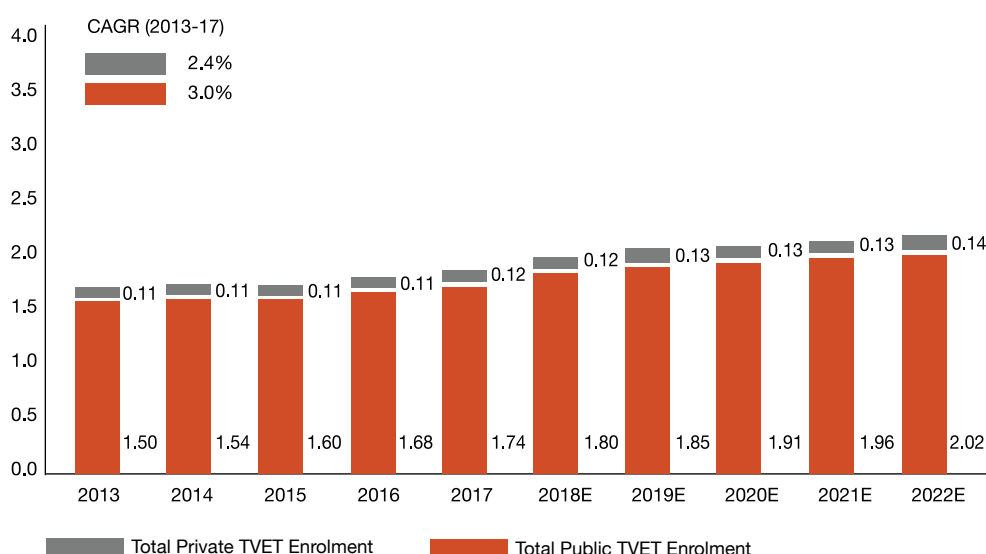
Source: CAPMAS Statistical yearbook 2017, PwC analysis

Technical and Vocational Education and Training (TVET)

Given Egypt's labour market dynamics, there is clearly a need to expand and improve TVET in Egypt. It is worth noting however that TVET is perceived by many Egyptians as a 'last resort' for academically low-performing students who are denied access to the general education, a pre-requisite for university enrolment.

Formal TVET is provided through preparatory vocational education, secondary technical and vocational, and higher education in technical colleges and Institutes of Industrial Education (IECs). Egypt's TVET system suffers from fragmentation as 17 ministries are involved in the vocational training while the MoE governs the technical colleges²¹.

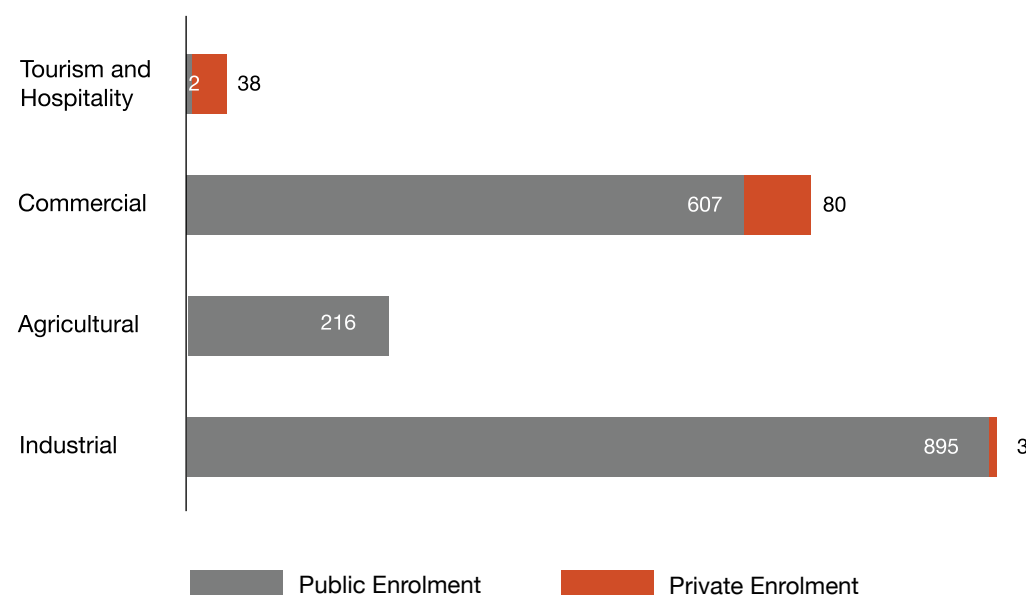
Figure 13: Secondary TVET Enrolment (measured in millions)



At current growth rates, an estimate of 295 thousand additional seats in secondary TVET will be needed by 2022.

Source: CAPMAS Statistical yearbook 2018, PwC analysis

Figure 14: Secondary TVET Enrolment by Specifications in 2017 (measured in thousands)



The only specification where the private sector is the lead provider is Tourism & Hospitality (59%). In Industrial and Commercial specifications private sector provision amounts to only 0.4% and 11.6%, respectively. There are no private TVET providers for agricultural training.

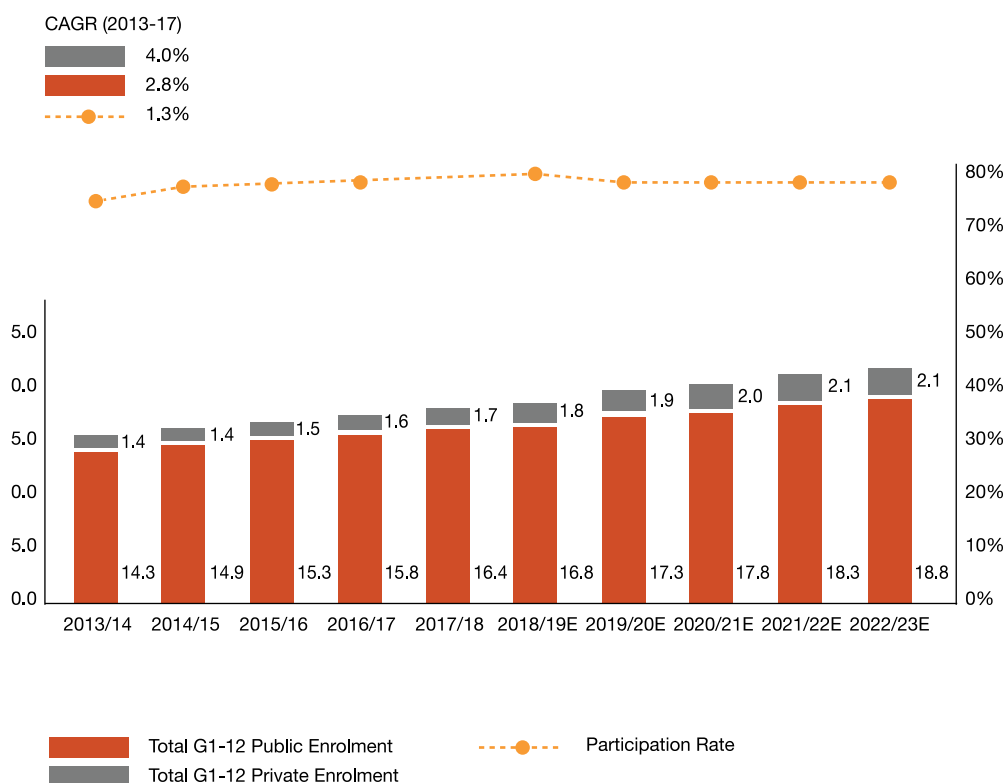
Source: CAPMAS Statistical yearbook 2018, PwC analysis

²¹ OECD School for Skills: A New Learning Agenda for Egypt, 2015



Grade 1-12 Education

Figure 15: Grade 1-12 Enrolment by School Type and Participation Rate



Private sector provision at the primary, preparatory and secondary stages represents only 10%, 7% and 13%, respectively. However, enrolment in private schools is growing at a faster rate than public schools with a CAGR of 4% between 2013 and 2017²².

Assuming full capacity of existing provision, an estimated number of nearly 2.4 million additional seats in grades 1-12 will be needed by FY 2022/23 at current growth rates.

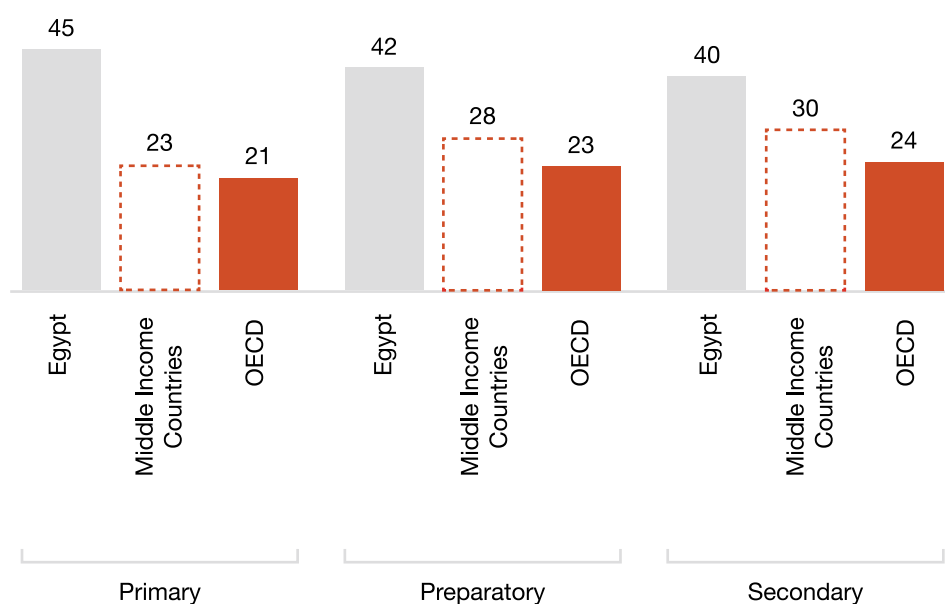
Source: CAPMAS Statistical yearbook 2018, PwC analysis.

²² CAPMAS Statistical yearbook 2018

Table 4: New Seats Required at G1-12 levels assuming full occupancy of existing schools

Grade Level	Estimated Number of Additional Seats Required by FY 2022/23 (both public and private)	Estimated Number of Additional Seats Required in Private Schools
Primary (1 to 6)	1,963,000	280,000
Preparatory (7 to 9)	541,000	83,000
Secondary (10 to 12)	302,000	76,000

Figure 16: Average Class Size by Education Stage

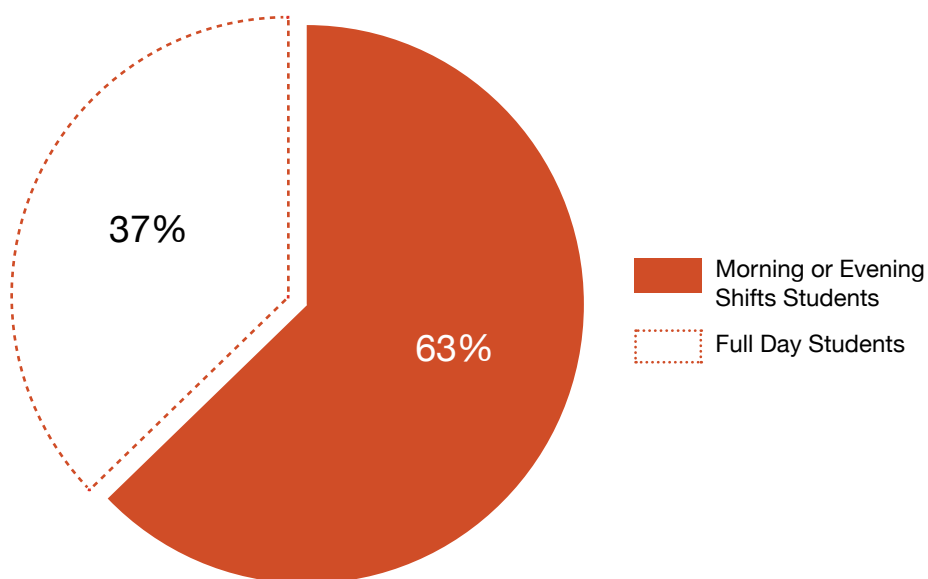


Source: OECD Schools for Skills report, 2015



As student enrolment growth outpaces the capacity of the system, average class sizes in Egypt are nearly double global benchmarks particularly at the primary stage. Such high densities burden infrastructure, limit the students' chances for obtaining individualised learning experiences and are likely a contributing factor to poor learning outcomes. Efforts to reduce class sizes would raise costs considerably and also increase the chances of hiring poorly-qualified teachers to cope with demand.

Figure 17: Percentage of Students Attending Full day Vs. Double Shifts Schools²³



Source: Ministry of Education (MoE)



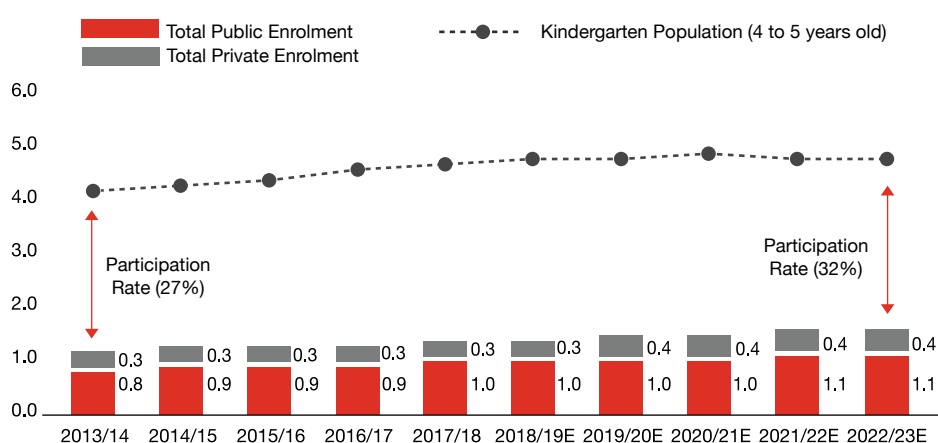
Due to capacity constraints in Egypt's public schooling system, many schools operate in double shifts, especially in densely populated urban areas. 37% of students in Egypt attend multiple shift schools which last for 4.5 hours, in contrast to full day schools which operate for 7 hours, making school time insufficient to cover curriculum.

²³ Full-day schools operate for 7 hours with 1 hour lunch break, multiple shift schools operate for 4.5 hours per shift (morning and evening).



Kindergarten

Figure 18: 4-5 Population and Kindergarten Enrolment by School Type (in millions)

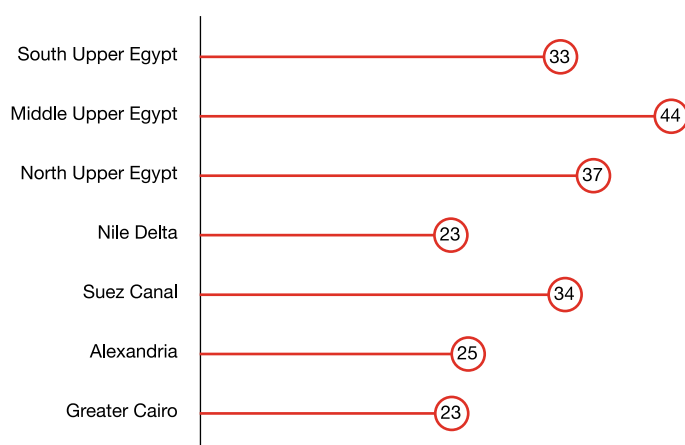


Source: CAPMAS Statistical yearbook 2018, PwC analysis



Enrolment in kindergarten (KG) is one of the lowest among MENA countries, at 31%. Based on historical growth rates and assuming full current capacity, an estimate of nearly 225,000 additional seats in KGs will be needed by FY 2022/23 of which 70 thousand are forecasted to be generated by private schools.

Figure 19: Kindergarten Student to Teacher Ratio per Region²⁴



Source: CAPMAS Statistical yearbook 2018, PwC analysis



Inequality in access is also prevalent. The majority of KG provision remains concentrated in the more affluent Greater Cairo region where 54% of total KG students are enrolled and student to teacher ratio is the lowest at a rate of 23 students per teacher. Conversely, the student to teacher ratio is highest in Upper Egypt, the region with the highest poverty rates. Due to the strong association of KG enrolment with family income, the majority of children from low income groups are estimated to be deprived of ECE.

²⁴ CAPMAS' calculations for student-teacher ratios include the large proportion of the teaching force in administrative positions and may therefore be inflated.



Conclusion

Egypt's future prosperity relies heavily on its citizens receiving a high quality education that prepares them for life in a rapidly changing economic and social setting. While the country has enjoyed major achievements in improving access at the primary and secondary stages and getting more girls into the education system, the system is yet to deliver the quality of education to support the nation's educational, economic, and social needs.

We believe there is both a strong opportunity and need for increasing private sector involvement in Egypt's education system's funding, structure and provision.

Increased private sector enrolment will help Egypt's government to relieve the budgetary pressures of a highly subsidised public education system and an increasing fiscal deficit. The opportunity for private sector involvement is also favourably reflected in the following investment dynamics:



1. A sustainable demand for education due to steady population growth
2. An improving macroeconomic setting
3. A stable institutional setting owing to the maturity of Egypt's education system
4. A need for investment in bridging skills gaps through vocational training and enhanced higher education offerings

While stronger collaboration with the private sector is needed, the GoE should be mindful of the following points:

- While private sector providers enhance parent choice in terms of quality, and relieve governments of capacity pressures, it is essential for government to maintain a balance between public and private education to ensure equitable access to education for all
- Private investors will be encouraged to focus on the education sector if there is a stable regulatory environment that provides the right incentive structure, supports their operating models and does not unduly impact on their ability to enter the market

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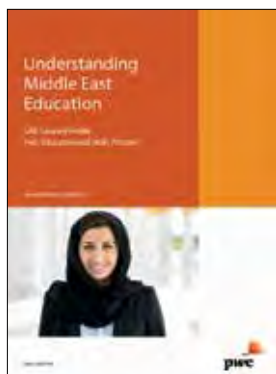
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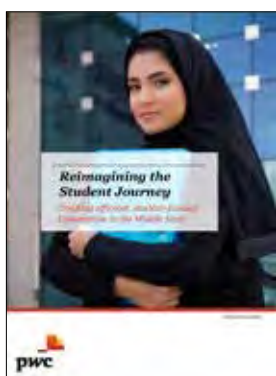
Understanding Middle East Education: UAE Country Profile

The UAE is one of the more mature markets in the region and remains a draw for investors, providers and students. Its scale and ambition remain undimmed, but what is the reality on the ground and what do the trends over time tell us about the education sector by segment? Finally what are the key differences between its two main markets – Dubai and Abu Dhabi?



Understanding Middle East Education: KSA Country Profile

The current nature of policy review and strategic overhaul in Saudi Arabia mean that the mechanisms for delivering education in the coming years are in flux. The initial education related objectives laid out in Vision 2030 challenge all elements of the system to improve on historical performance and prepare the country's workforce for a diversified and knowledge-based economy.



Reimagining the student journey

'Reimagining the Student Journey' is the first in a series that examines the key themes influencing one of the world's most dynamic regions in Higher Education – the Middle East. This paper looks at how Higher Education Institutions (HEIs) in the region can apply a Student Journey management approach to help build efficient, customer-centric organisations that are agile enough to survive and thrive in a rapidly changing. We look at the main issues facing Higher Education in our region and how Student Journey design and management can help Universities to meet these challenges.



Improving learning for children with social, emotional and behavioural difficulties

How can we improve learning for children with social, emotional or behavioural difficulties (SEBD)? Globally, one of the challenges facing policy makers is providing education to students who cannot access mainstream provision, or to those who need additional support to do so. This is particularly true for children with social, emotional or behavioural difficulties (SEBD) who may need specialised environments to address their needs or who can exhibit disruptive behaviour that can result in exclusion from mainstream education environments.

About the PwC Education and Skills practice

PwC has operated in the Middle East region for more than 40 years.

Collectively, our Middle East network employs in the region of 5000 people including over 180 partners working from offices in 23 locations across 12 countries: Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Oman, the Palestinian territories, Qatar, Saudi Arabia and the United Arab Emirates

1 Tripoli	12 Riyadh
2 Cairo	13 Jeddah
3 Alexandria	14 Dhahran
4 Ramallah	15 Al Khobar
5 Jerusalem	16 Manama
6 Gaza	17 Doha
7 Beirut	18 Sharjah
8 Amman	19 Dubai
9 Erbil	20 Abu Dhabi
10 Baghdad	21 Ras Al-Khaimah
11 Kuwait	22 Muscat



Our Education and Skills practice works **nationally** and **internationally** across the education sector with private and public sector providers, regulators and funding agencies.

Our team of dedicated education specialists offer deep strategic and operational expertise in all the key sectors, from primary and secondary through to vocational and higher education.

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 and expansion strategy. We also have the resources to conduct in-depth research into education sector issues such as labour market readiness and national curricula reform.

Our areas of expertise include:

- Institutional implementation
- School quality improvement and regulation
- Market entry and growth strategy
- Strategy and policy development and implementation
- Education digital transformation

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Sally Jeffery
ME Education Partner & Global
Education Network Leader



My focus over the last 20 years has been on sector expansion and reform, strategic planning, governance, performance improvement and partnering models.

I worked extensively in the education and healthcare sectors with both public and private institutions. My overall experience spans the US, Europe and most of the GCC markets.

I am 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.

About PwC

At PwC, our purpose is to build trust in society and solve important problems. We're a network of firms in 158 countries with over 250,000 people who are committed to delivering quality in assurance, advisory and tax services. Find out more and tell us what matters to you by visiting us at www.pwc.com.

Established in the Middle East for 40 years, PwC has 22 offices across 12 countries in the region with around 5,200 people. (www.pwc.com/me).

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