

# Equity, the transnational and the global learning crisis

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## Equity, the transnational and the global learning crisis

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### ABSTRACT

This review article critically examines the role of political economy variables in shaping education policy in the context of a global learning crisis. It surveys the literature on how factors such as democracy, institutional arrangements, ideology, and transnational dimensions influence the promotion of equitable learning. The article assesses the role of these factors in the case of Egypt through a review of educational developments over the past three decades in a country that shares many challenges with low- and middle-income countries. Presenting novel data and key indicators on Egypt and a framework for analysing equitable learning elsewhere, the article maps the dimensions of the learning crisis that has developed in parallel to the adoption of a new global learning agenda supported by international agencies. The analysis suggests that democracy and institutional features are not robust explanatory variables for the adoption or successtion of effective education policy. Instead, the article shows how commitment to equity, patterns of privatization, and levels of international debt and development assistance are the critical elements of understanding the learning crisis.

### IMPACT STATEMENT

The article conducts a thorough review of literature on political factors affecting educational policies in developing nations, with a specific focus on Egypt's learning crisis. It emphasizes corruption, equity, and debt as pivotal political variables influencing policy adoption and implementation. Contrary to common assumptions, it suggests that privatization, commitment to equity, and transnational factors play a more significant role than democracy or political competition in promoting equitable learning policies. Additionally, the article presents a detailed update on quantitative indicators of investment, equity, and learning outcomes in Egypt's educational landscape, integrating unique indicators and calculations not found elsewhere. This comprehensive framework is transferable and applicable to the analysis of education systems in other contexts.

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## Introduction

A popular assumption in academic literature and public discourse is that the absence of democracy offers a good explanation for poor public investment across a variety of social sectors. Here, weak public investment in good social policies is the result of a lack of accountability by voters and the repression of pressure groups. The assumption is that democracy offers channels for voters to pressure governments to implement reforms and repression stifles pro-reform critique, organization, and mobilization. In the Arab world, as in many other regions, authoritarianism is often identified as being at the root of educational problems, from a lack of critical thinking skills to the absence of deeper educational reforms. Several studies have emphasized the role of authoritarian politics and 'limited access orders' in shaping the architecture of national governance in the region (see Alaoui & Springborg, 2021). In the case of Egypt, the neglect of education is also often portrayed as a result of a deliberate strategy to keep the population uneducated. In this view, increasing the number of educated people, who might be more

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likely to join oppositional bodies and activities, is seen as a threat to ruling regimes. On the other hand, an intentional strategy of keeping the population uneducated would not explain the similarly poor investment in health, transportation, or basic infrastructure for the majority of citizens (Sobhy, 2023b) (Figure 1).

While assumptions about authoritarianism's impact on social policy are popular in undemocratic contexts striving to free themselves from autocracy, another body of literature has suggested that democracy actually offers channels for diverting funds to selected more vocal constituents or clientelist networks linked to elections or only for implementing popular reforms. Other literatures suggest that democracy allows for resisting needed reforms by actors such as teachers' unions for example, so that some reforms are particularly undermined by forms of participation and voice (see Hickey et al., 2019; Weiner & Compton, 2019). It is also possible that neither assumption holds enough explanatory power; that neither democracy nor its absence can help us understand the adoption of policies that promote equitable learning. Instead, a process of imitation, global policy learning, or assistance may account for the adoption of specific educational models or policies (Pritchett, 2018). Other literatures have suggested a link between ideology and education policy and achievement, in particular in terms of the level of commitment to equity among governing elites in terms of pro-poor, left-leaning or market-oriented and neoliberal politics (Ansell, 2010; Ha, 2015). Educational policies are certainly shaped by a variety of political, economic, cultural, and historical factors.

This review article brings insights from the Egyptian case to wider debates about the political economy variables informing the adoption of learning reforms in lower-income countries, especially those with non-democratic settings. Despite being a regional centre for learning throughout most of the 20th century, the quality of education in Egypt has been continuously declining over the past decades. By 2016, Egypt ranked second to last in the world in terms of students' reading abilities in the international PIRLS assessment (Mullis et al., 2017). In 2018, the Egyptian Ministry of Education embarked on a comprehensive reform program, Edu 2.0, which aimed to raise the quality of learning, by transitioning the education system away from a traditional emphasis on rote learning, and towards acquiring higher-order critical thinking, creativity, communication, and digital skills.<sup>2</sup> In 2020, Egypt scored 0.49 on the Human Capital Index (HCI), indicating that 'a child born in Egypt today will be only 49% as productive when he/she reaches the age of 18 as she could be if she enjoyed quality education and full health' (World Bank, 2020). Compared to other low- and middle-income countries, Egypt has a relatively median Human Capital Index (HCI) ranking, so that many of the issues it is confronting are likely shared by other countries. However, it is education that particularly brings down Egypt's score on the index (World Bank, 2020). The case of Egypt can therefore be instructive for other contexts, especially those experiencing reduced public spending and increased formal or informal privatization. The rapid defunding of education in Egypt is coupled with massive private spending that has failed to remedy the learning crisis. This private spending, mostly in the form of private tutoring, has however led to the informal abandonment of public schools, where results of a recent national survey indicate that a shocking three quarters of students reported that they had been absent from school in the past week, with most of them being absent for 5 days (Egypt Labor Market Panel Survey (ELMPS) 2018).

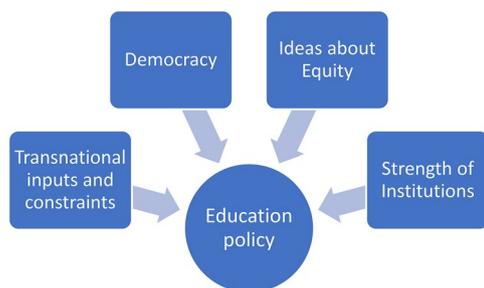


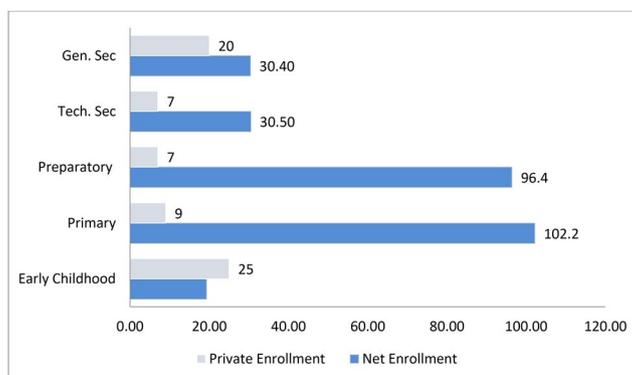
Figure 1. Theorised determinants of education policy<sup>1</sup>.

The article situates the learning crisis in Egypt in the larger arc of educational policy in the country, by inquiring into the political variables that can explain *why* recent investment in learning has been so low in Egypt. As recent World Bank analysis puts it, 'education spending, its efficiency, and learning outcomes remain lower than needed for robust human development, poverty reduction, improved equity, and long-term growth' (World Bank, 2022a, v). While acknowledging the difficulties involved in establishing causal links between political economy variables and learning outcomes, the article engages with the available literature and underlines correlations that can guide future research on political economy-policy-outcomes linkages in the educational field. It also offers new quantitative analysis of key educational indicators in Egypt, summarized in four tables (Figures 2–5) much of which has never been compiled before, in a context of severe challenges in data access and availability. This analysis provides an important basis for future research on Egyptian education. It provides the first ever estimate of average teacher salaries in Egypt and of private spending on education relative to public spending. It constructs a picture of tracking in the system (Figure 4), levels of private enrolment in the different stages and tracks of schooling (Figure 3) and their rates of growth, which is not available elsewhere. It also offers directions for assessing equitable provision of education elsewhere. It organizes key indicators of inputs and outcomes into three categories relating to equitable learning along the lines of investment, equity and learning (Figure 5). As such, it underlines the importance of incorporating a range of equity-related indicators in analysis of education systems in low and middle-income countries.

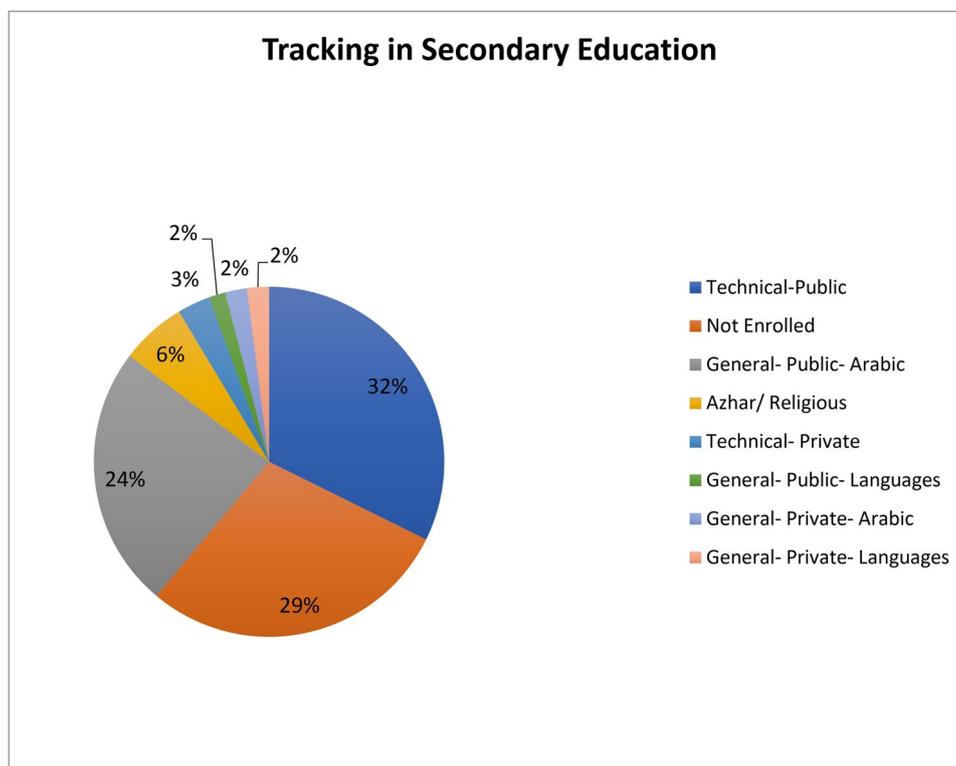
The first section addresses the literature on the relationship between political settlements and educational policies, weaving in empirical literature that supports or critiques these propositions about: 1) the role of power arrangements, 2) commitment to equity and patterns of privatisation, and 3) the transnational variables of ideas, aid and debt. The second section surveys the key parameters of the state of education in Egypt, bringing together novel quantitative and qualitative analyses of equity and quality in the system. The third section analyses how political changes have affected the key parameters of education policy in Egypt over the past decades parsing out the role of power arrangements, ideology and transnational factors. The conclusion returns to the place of commitment to equity and transnational variables in political settlements. First, it underlines how changes in democratic governance are difficult to link to education policy and outcomes in the Egyptian case. Second, while an increase in corruption and informality/weak institutions clearly correlates with the decline in

|                     |           |
|---------------------|-----------|
| Students            | 22691232  |
| Schools             | 49804     |
| School staff        | 1,265,754 |
| Teachers            | 840,436   |
| Practicing Teachers | 560,290   |

**Figure 2.** Size of the public school system in Egypt<sup>5</sup>.



**Figure 3.** Net and private enrolment across educational stages<sup>6</sup>.



**Figure 4.** Distribution of students across tracks in the secondary stage<sup>8</sup>.

learning, the vast increase in ‘permissiveness’,<sup>3</sup> in the system can also be seen as a *result* of poor public investment, even if it contributes in turn to further decline in learning. Third, it suggests that the turn to neoliberalism and the reduced commitment at the leadership level to promoting equity through public education have clearly correlated with the steep decline in learning. Fourth, decades of transnational policy influence and direct support have also correlated with declining learning outcomes, exacerbated by mushrooming debt and austerity prescriptions of international debtor institutions.

### Political settlements and the adoption of learning reforms

Understanding how educational change occurs requires a political economy approach that describes the motivations and behaviours of governments and policymakers (Pritchett, 2018). However, while existing research has attempted to establish links between political economy variables and learning outcomes, many available studies do not address the two elements (independent and dependent variables) directly. Even when studies rely on standardized measures of student learning, the political economy variables they link to educational policy can be diverse. For example, different studies consider that successful education policy produces a large expansion in education or a reduction in dropout rates, while others use public spending on education as a proxy for commitment to education, so that the equity, quality and efficiency dimensions of educational spending can be obscured. Furthermore, investment in education could be motivated by numerous other considerations apart from learning literacy and numeracy, including socialization, nation-building, regime-consolidation, deterring violent contestation or containing extremism (see also Gershberg, 2021; Mitchell & Mitchell, 2003). In engaging with this diverse literature, this section surveys factors that have been considered relevant in understanding the political economy of education, while attempting to underline correlations between political economy variables and equitable learning.

Frameworks centred on political settlements have been gaining prominence in examining the links between political economy and social policy in developing countries. According to one of the key proponents of this approach, political settlements are shaped by ‘the relative holding power of different

| Resources   |                         |
|---|-------------------------|
| Public spending as a % of GDP   | 1.7%                    |
| Public spending on education as % of public expenditures                  | 6%                      |
| Public spending per student   | 1160 \$PPP              |
| Average Public Teacher Salary   | 1230 \$ PPP             |
| Public Teacher Salaries as a ratio of GDP/capita                          | 1.1                     |
| Teacher Shortages   | 350,000                 |
| Classroom Shortages   | 250,000                 |
| Days/school year in non-shift schools (max. learning time)                | 120                     |
| Students in multiple shift schools (reduced learning time)                | 62%                     |
| Pre-primary net enrollment (ECE)  | 20.6%                   |
| Students reporting absence of more than 5 days/week                       | 80%                     |
| Equity  |                         |
| Ratio of primary to secondary public spending per student                 | 0.5                     |
| Average classroom density in the public primary stage                     | 54                      |
| Average classroom density in the public pre-primary stage                 | 32                      |
| Primary to General Secondary Student Teacher Ratio (STR)                  | 1.9                     |
| Ratio of poorest to richest preprimary enrollment                         | 0.4                     |
| Ratio of rural to urban learning scores                                   | 0.5                     |
| Students in low quality technical education                               | 49%                     |
| Private to public spending on education                                   | 130%                    |
| Private education enrollment  | 11%                     |
| Private tutoring enrollment   | 50% ++                  |
| Gender gap in primary enrollment  | -3.5%                   |
| Learning Outcomes   |                         |
| Age 10 children who cannot read with comprehension                        | 70%                     |
| Intl. rank in reading & writing   | 2 <sup>nd</sup> to last |
| Students achieving beginner level in Mathematics and Arabic, respectively | 49% and 47%             |
| Human Capital Index score   | 0.5                     |

**Figure 5.** In numbers: inputs, equity and outcomes in pre-university education in Egypt<sup>22</sup>.

groups and organizations contesting the distribution of resources', with holding power 'partly based on income and wealth but also on historically rooted capacities of different groups to organize' (Khan, 2010); (1). Furthermore, the historical moments at which political settlements become established or experience rupture can create the conditions for significant shifts in policy approaches, including within the domain of education (Hossain & Hickey, 2019). An emerging body of research has taken different perspectives to address the link between political settlements and education in developing countries, particularly in relation to learning reforms (see Figure 1). Levy et al. (2018) argue that a great deal of insight can be gained about education policy by delving into three key variables: (1) the extent of inclusion (or exclusion) by dominant elites, or the degree of cohesiveness among elites about the nature of the political settlement; (2) the characteristics of the configuration of power in terms of polarity, hierarchy, and political competition; and (3) the norms and dynamics governing institutions (personalized, corrupt, rule-based, meritocratic). In this view, identifying the type of regime and the key features of bureaucracy goes a long way to determine the parameters of successful policy adoption and implementation. Similarly, scholars such

as Hossain and Hickey (2019) use a political settlement framework to explain political commitment and the capacity to implement learning reforms, reflecting the incentives and ideas that predominate among political elites, which, in turn, are shaped by the underlying character of politics and power in specific contexts.

In his most recent work, Levy (2022) synthesizes the findings of a range of recent country studies to explore the influence of politics and power on education sector policymaking and implementation. He finds that in dominant contexts, where power is centred around a political leader and a hierarchical governance structure, top-down leadership can potentially provide a robust platform for improving learning outcomes. However, dominant leaders' goals vis-à-vis the education sector can veer in other directions. In impersonal competitive contexts, a combination of strong formal institutions and effective processes of resolving disagreements can, on occasion, result in a shared commitment among powerful interests to improve learning outcomes – but in none of the case studies is this outcome evident. Personalized competitive contexts lack the apparent strengths of either their dominant or impersonal competitive contexts; there are multiple politically influential groups, but no credible framework of rules to bring coherence either to political competition or to the education bureaucracy (Levy, 2022). In sum, he concludes that it is difficult to link the combination of dominance, competition, and the rule of law (impersonalized bureaucracy) to the adoption or implementation of learning reforms (Levy, 2022).

Similarly, other scholars have underlined the difficulty in linking democracy to the commitment and capacity to undertake learning reforms in other literatures. A range of empirical studies underline that democracy cannot be considered a prerequisite for better educational outcomes. As Pritchett (2018) puts it, neither the economist's naïve 'normative as positive' (that governments did things because it was the normatively optimal action, in the sense of maximizing some measure of human well-being), nor 'response to political pressure' (that governments did things because democratic pressures demanded it) hold any promise as general models. The assumptions that a mixture of electoral competition, decentralization, and stronger downward accountability would do the trick, in part by countering the oft-cited malign influence of teachers' unions in blocking reforms that might damage their interests, have rarely been grounded in comparative evidence of how the politics of education reforms have played out in practice (Hickey et al., 2019). This contention is supported by the evidence that the statistical outperformers in education league tables have tended to be led by countries (including Japan, South Korea, Singapore, and Vietnam), which would all have been described as 'dominant' during the period of their most significant advances on this front (Hickey et al., 2019). As Pritchett (2019) summarizes it, the available data on achievements in learning illustrate that "democracy' is neither necessary (Vietnam counter-example) nor sufficient (South Africa counter-example) for high learning achievement in schools."

Other scholars have focused not on the balance of power in society or the type of regime, but on how its power base has been crafted and mobilized. Kosack (2012) argues that none of the three most common political-economic explanations (relating to regime type, education cultures, and governmental commitment to economic performance) predict the realities of education policies. In his analysis of Taiwan, Ghana, and Brazil, he concludes that answers to two questions can explain patterns of educational investment: whose support does a government need to stay in power? What sort of education do those citizens want? He underlines that governments that expanded education for the poor were more often autocratic than democratic, but were always clearly associated with political entrepreneurs, who mobilized and depended on maintaining poor citizens' support with pro-poor policies (Kosack, 2014). These arguments cohere with the historical trajectory in Egypt, with the delivery and expansion of decent quality public education under the postcolonial regime of Nasser (1952-1970), which positioned itself as supporting the interests of the poor and disenfranchised.

Beyond democracy and power arrangements, questions around the strength of institutions (rule of law) also cannot be clearly linked to educational outcomes. Different forms of permissiveness or weak rule of law- corrupt hiring or procurement practices, poor discipline in schools, informal and extra legal practices- have different implications for the education sector. Some the discussion around rule of law in education involves questions around corruption. There is a long-standing debate about whether, despite introducing inefficiencies, corruption 'greases the economic wheels' and is not necessarily detrimental to growth or service delivery, but little research exists on whether and the extent to which corruption or weak institutions in education contribute to poor learning outcomes. Some research has suggested a link

between increased corruption and worsening educational indicators and the quality of teaching, learning, motivation and participation in education (Dridi, 2014; Sabic-El-Rayess & Heyneman, 2020). Others have shown that public corruption distorts the structure of public spending by reducing social expenditure on education, health and social protection (Delavallade, 2006). For example, one study on Indonesia has found that public spending appears to have a negligible effect on school enrolment in highly corrupt regions, but a statistically significant, positive and relatively large effect in less corrupt regions (Suryadarma, 2012). Recent research has shown how weak rule of law grows in response to the withdrawal of the state from its responsibilities, even if it undoubtedly reinforces the weaknesses in the education system (Sobhy, 2023b). That is, weak rule of law may correlate with poor learning, but not necessarily cause it. Disinvestment in education and the promotion of privatization undermine school quality and teacher wages, thereby increasing pressures towards permissiveness in the form of coerced private tutoring, shirking, lax assessment, absenteeism, poor discipline, which all in turn further undermine learning in schools (Sobhy, 2012, 2021, 2023b). The ambiguity in the causal impact of rule of law and corruption in the literature may also be the result of their varying definitions and manifestations. However, as Levy (2022) notes in the case of Kenya for example, notwithstanding its political-institutional order 'rife with patronage, factionalism and corruption', cross-country standardized tests show the country to be a strong positive outlier in its learning outcomes.

### **Equity, privatization and tracking**

Existing research has underlined the need to extend the boundaries of political settlement analysis beyond a focus on political and institutional dynamics at the national level to incorporate a stronger focus on ideas and transnational factors. Dominant ideas around state legitimacy and development have played an important role in shaping governance and development, and this has often involved a role for the shifting sets of transnational actors on which the regime relies to maintain itself in power (Golooba-Mutebi & Hickey, 2013). Ideas around education, the social role it plays, and the way the delivery of education should be governed all play important roles in shaping the extent to which higher-quality learning has been prioritized and achieved in developing countries (Hickey & Hossain 2019).

Ideological variables, in terms of the emphasis on equity or market-oriented reforms, fundamentally shape policy choices related to the adoption of learning agendas (Gershberg, 2021). Investment in improving learning is also premised on long-standing views of the division between public and private responsibility for the provision of education. Research has shown that partisanship matters for education, particularly in terms of increased spending in developed and developing countries (Ansell, 2010; Ha, 2015). The absence of programmatic education agendas in developing countries may also be related to the general absence of programmatic class-based parties; the political history of education in developed countries indicates that parties and coalitions on the left and center are more likely to promote wider access to education and are associated with higher public spending on education (Busemeyer, 2014). In developing countries, left-of-centre political forces may also be more likely to spend on education, regardless of the existence of democracy. One recent study has shown that leftist governments in developing countries spend more on education, while more democratic nations spend a greater amount on social security and welfare, which disproportionately benefit formal-sector workers, who tend to be the decisive voters, while education spending helps a broader spectrum of people (Ha, 2015).

A specific aspect of ideas and ideologies, commitment to equity, has been linked to improved better education. Analysis of performance in the OECD's Programme for International Student Assessment (PISA) indicates that 'Regardless of a country's or economy's wealth, school systems that commit themselves, both in resources and in policies, to ensure that all students succeed perform better in PISA than systems that tend to separate out poor performers or students with behavioural problems or special needs' (OECD, 2012). Improving learning is essentially premised on a clear commitment to equity, an assumption that remains implicit in many analyses of the learning crisis. A commitment to learning implies diverting initiatives and resources to those students who fail to accumulate foundational skills and not to the more privileged or advanced students. Identifying and implementing equity-promoting initiatives and forms of spending should be at the core of engineering and predicting improved learning. Forms of tracking may also undermine coalitions and political commitments to reform. For example, in the

presence of privileged and less-privileged (technical and general) education tracks, governments may opt to only reform the middle-class (general) track, as in the case of Egypt. In contexts where there are two linguistic tracks, like some parts of North Africa (French and Arabic instruction), there is less pressure and incentive for elites to upgrade the less privileged track or the system as a whole, which continues to run 'in two speeds' (Boutieri, 2012).

Formal and informal privatization in education is also critical for understanding commitment to learning as well as the (non)emergence of coalitions for reforms that support equitable learning. Existing literature acknowledges that middle class parents leaving the system for private schools undermines such potential coalitions (Hickey et al., 2019). Leaving the public system may also be partial, gradual, and informal when it takes the form of private tutoring. This kind of informal privatization in the form of private tutoring plays a critical role in undermining learning inside classrooms, as well as the desire and coalitions for reform. Shadow education has been rapidly growing worldwide in recent decades (Bray, 2017). Private tutoring perpetuates and exacerbates social stratification (Bray, 2024) and the marketization of education worsens learning disparities (Alcott & Rose, 2016). In contexts where parallel schooling becomes more dominant, it radically transforms incentives, risks, and opportunities for families and teachers alike (Sobhy, 2012, 2023b). Income from tutoring redistributes possibilities of livelihood and status among academic subjects and along gender, class and regional lines (Sobhy, 2023b).<sup>4</sup> There are also different modalities of private tutoring: (1) competitive systems, as in South and East Asia, where students pursue advanced learning and tutors operate outside the formal system; (2) contexts of low teacher pay and under-resourced classes, as in parts of Africa (Bray & Baba-Moussa, 2023), where private tutoring by classroom teachers functions in formats that border corruption, often deploy coercion and promote cheating and minimal learning; or (3) divided systems that include both types of competitive and extractive tutoring as in the case in Egypt (see also Sobhy, 2012, 2023b). Different modalities of privatization have different implications for three key elements: incentives of students, teachers and parents, patterns of learning across the system and the growth of coalitions that might support it. Middle-class parents may nominally stay in the public system while providing assistance to their children via the informal tutoring market, leaving them with little time, energy, or hope to push for improvements in public schools. The pressure on parents is then to demand salary increases to pay for privatized education instead of demanding improvements to public education. Teachers might also find it far less worthwhile to collectively demand incremental salary increases than to individually struggle to be assigned or transferred to contexts of higher potential tutoring profits (schools in more affluent neighborhoods, urban regions, private schools and higher educational levels, i.e. to general secondary education rather than preprimary or primary). They might also be less likely to accept appointments in non-tutoring subjects, like art, sports, music or theatre (if funds are made available for such hiring in the first place). The massive inequality between teachers due to highly differentiated private tutoring income across gender, subject and geographical lines also destroys potentials for coalition building among teachers to advance their rights.

### **Transnational variables: Ideas, aid and debt**

Transnational alliances, ideas, aid and debt also shape the adoption of educational policies. Pritchett (2018) has underlined that 'global isomorphism' remains a strong conjecture as a causal force in both expansion and modality of education and, perversely perhaps, isomorphism facilitates the persistence of low learning quality. Pasi Sahlberg has analysed the key assumptions that drive GERM, the Global Education Reform Movement (Sahlberg, 2023), and its negative consequences for learning, teaching, and teachers, noting how educational performance overall has not improved during the past two decades which suggests that competition, choice or tougher accountability will not guarantee systemwide improvements

In countries where resources are strapped and international aid is an important source of policy setting and financing in relation to educational reform, the international aspect has even greater prominence. The impact of debt on social spending is also a critical factor. The reasons for growing debt burden may divergent across countries, but are always the result of a mix of domestic and international factors. The

experience of a number of Asian countries confirms that outstanding external debt and its servicing liability have an adverse impact on public spending, particularly on education and health (Shabbir & Yasin, 2015). A study of a panel of 108 countries for the years 1991-2019, shows that debt crises tend to be detrimental to social spending, undermining social protection substantially and threatening social wellbeing (Nguyen et al., 2022). Developing countries suffering from debt and receiving loans from international organizations, like the International Monetary Fund (IMF), are under immense pressure to reduce their spending in general, and their wage bills in particular, directly affecting teacher wages and the ability to meet teacher shortages. Existing studies suggest that IMF loan conditions lead to decreasing educational spending (Naiman & Watkins, 1999; Stubbs et al., 2020) and possibly children's chances of completing school (Daoud, 2021). Austerity measures related to IMF loans have affected the majority of the world's population and are expected to intensify in the post-pandemic context, increasing poverty and inequality (OXFAM, 2021). Governments are expected to improve learning while decreasing their budgets. With its growing debt burden and two IMF bailouts in 2016 and 2024, the following sections underline the massive decline in public spending on education in Egypt correlating with IMF bailouts, with spending falling to half its earlier levels within just ten years, creating teacher and classroom shortages in the hundreds of thousands.

### The learning crisis in Egypt

Education in Egypt shares many similarities with other contexts experiencing learning crises. Egypt's experience can be instructive for other contexts in terms of the rapid decline in the quality of education. Egypt might also be unique in the level informal privatization through private tutoring, which has been emptying public schools, despite very high nominal enrolment in public education. Figure 5 summarizes the available quantitative indicators that capture key elements of the learning crisis. However, a deeper dive into the different elements of the crisis is critical for a more comprehensive understanding and for sounding an alarm to other contexts that may be at different points in relation to these different dynamics.

It must first be noted that the pre-university education system in Egypt is very large. By 2022/23, the number of students had reached 25.5 million students in over 60,000 schools (MOE, 2023). Public schools enroll about 23 million students and employ 840,000 teachers and 1.3 million staff persons in 50,000 schools, not counting central and regional administrative staff (Figure 2). The system consists of a **primary** (years 1-6), **preparatory** (years 7-9) and **secondary** stage (years 10-12). Preprimary education is neither free nor compulsory. Secondary education comprises two main tracks: **general** and **technical**. Students who score below a certain annually determined cut-off score on the year 9 preparatory stage completion exam can only continue on the technical secondary track, focusing on vocational skills. A religious education (Azhar) track, not administered by the Ministry of Education, enrolls approximately 10% of students across different stages.

### Expanded access, except for the preprimary stage

Egypt has clearly achieved virtually universal enrollment in primary education. Gender differences are very small in official enrollment, drop-out rates, transfer and success rates, with the exception of pass rates in technical education, where girls are significantly more likely to pass. Girls also have a higher enrollment rate in general secondary education (see MOE, 2023). Figure 3 shows both levels of enrollment in private education as well as net enrollment in MOE-supervised schools. Egypt's preprimary enrollment of 29% is far lower than both the average for its region (46%) and the average for its income group (49%) (World Bank, 2020). Net enrollment is even lower at 19% in 2022/2023 (Figure 3).

### Poor learning and diminished returns

The nominal expansion in access is structured by a decline in quality and equity as well as diminished returns to education. Egypt has conducted or participated in standardized assessments for the past

twenty years. In the 2007 TIMSS international ranking, 53% of Egyptian 8th grade students did not meet the low international benchmark in mathematics (Mullis et al., 2017), and 45% were also below the lower benchmark in science (United Nations Children's Fund (UNICEF), 2015, 39). This was already 5% lower than Egypt's 2003 score (MOE, 2007, 46; 2014). According to the results of the national standardized assessment released in 2010, the average scores were less than 50% in Arabic, Science and Mathematics (MOE, 2010; 2014). By 2016, Egyptian students scored second to last in the world in the PIRLS international reading assessment (Mullis et al., 2017). Based on the learning poverty indicator, about 70% of age 10 children in Egypt cannot read a short age-appropriate text with comprehension, which is 14.5 percentage points worse than the average for lower middle-income countries (World Bank, 2019). The most recent standardized assessment nationwide of the achievement of grade 4 students in Arabic and Mathematics was undertaken within the Edu 2.0 reforms. About half of students (47% for Arabic and 49% for Mathematics) achieved only 'beginner level', which indicates that they did not achieve the level of learning that qualifies them to transfer from Grade 4 to Grade 5, while less than 4% of students achieved 'advanced level' (3.5% in Arabic and 3.7% in Mathematics), and the performance of urban, female and Azhar students exceeded that of their peers (MOE, 2022). Labor market dynamics, external to the education system, also impact attitudes towards and commitment to learning. Education has been substantially devalued in the face of a rapidly increasing supply of educated individuals and limited expansion in the demand for educated labor (Salehi-Isfahani et al., 2009).

### **Equity and tracking**

The learning crisis does not of course impact students equally across a highly stratified system. Official achievement data in Egypt show clear polarization based on financial ability (UNDP 2010, 44). Disadvantaged children are less likely to complete basic education and the need for additional spending in the form of private tutoring (discussed below) exacerbates socio-economic inequality in education (Krafft & Assaad, 2015). High and unequal levels of household expenditures on private tutoring and tracking into vocational and general secondary schools that depend on high-stakes examinations substantially contribute to unequal learning outcomes (Ersado & Gignoux, 2017). Furthermore, inequities in learning opportunities among Egyptian youth are high compared to other countries at absolute levels, and learning gaps appear in the early grades (Ersado & Gignoux, 2017). Disaggregated data on literacy show that poor reading and writing are more pronounced in rural and disadvantaged schools (Egypt et al., 2022). In one assessment for example, 41% of rural students could not answer any reading comprehension question correctly (zero scores), while 27% of urban students had zero scores (Egypt et al., 2022). Based on the latest standardized assessment, the scores of rural students were at least half of those of urban students. For example, in Arabic language, 39% of rural students scored below the lowest benchmark ('below the grade level'), compared to 20% of urban students (MOE, 2022, 8). Conversely, the percentage of students (26%) reaching the required grade level ('competent') in urban areas is double that in rural areas (13%). Income-related disparities are also clear in preprimary and secondary stage enrollment. Only 22% of children from the lowest socioeconomic households enroll in preprimary education, compared to 55% from the highest (World Bank, 2022b, 24). Enrollment in the secondary stage also shows strong differentiation by family income, where 50% of children from the poorest households enroll, compared to 90% from the richest (World Bank, 2022b, 24).

To appreciate the forms of tracking in the system, it is worth more closely examining the secondary stage. The two main tracks are general secondary education, which is the track from which the highest achieving students can go on to study at the university level, whereas technical education is considered a very low-quality track with very limited opportunities for learning, as official sources have long admitted (see Ministry of Education (MOE), 2007). Figure 4 shows the distribution of the secondary stage age cohort. The first element to note is that close to one-third of youth in the age cohort drop out before reaching the secondary stage, which remains a disproportionately urban phenomenon.<sup>7</sup> For the rest of the cohort, 35% were enrolled in technical secondary schools, 31% in general secondary schools, and 6% in religious Azhar schools (not supervised by MOE). Private schools enroll about 8% of the cohort, and

less than 4% of youth enroll in more privileged language schools, some of which are private while others are fee-charging state-run schools (see [Figure 4](#)). About 0.5% of students enroll in the most expensive private *international* schools, representing about 5% of private school students (Sobhy, 2023b, 43).

### **Public spending and its allocation**

Public spending on education in Egypt has been declining since the 2000s and remains at **less than half** of regional and global averages. Public spending on education in Egypt is low compared to international and regional standards and has been declining since 2000 (El-Baradei & El-Baradei, 2004; OECD, 2015). Instead of increased spending to match the new plans of Edu 2.0, public spending on pre-university education had declined as a Percentage of GDP and of public expenditures in 2018. Pre-tertiary education spending as percentage of GDP declined from 2.8% in FY2015/16 to 1.7% in FY2019/20, also evidenced by the fall in real spending by 3% when calculated using constant 2010 prices, despite large nominal increases (World Bank, 2022b; 21).<sup>9</sup> This level of spending is *less than half* of the 2010 level of 3.5% of GDP and less than half the constitutional minimum spending set at 4%. It is also half of the OECD average for public spending on pre-tertiary education. In fact, the cumulative gap in public financing of education has been estimated at EGP 729 Billion for the four years between 2016 and 2020 alone (World Bank, 2022b, 21). From a regional perspective, Egypt's total education spending (including tertiary education) is 2.5% of GDP (against a constitutional minimum of 6%), while Tunisia spends 7.3% and Lebanon, where most enrollment is in the private sector, spends 2.6% (World Bank, 2022b; 21). Spending as a percentage of government expenditure had also declined to *less than half* its level in less than eight years between 2010 and 2018 from 12.6% to about 6%.<sup>10</sup> Neither spending as a percentage of GDP nor spending as a percentage of public expenditures of course give the full picture, especially given the large size of the Egyptian education system, where spending per student must also be considered. Spending per public school student in 2018 amounted to 4400 EGP, or 1160 \$PPP, compared to an OECD average of 10,000 \$PPP and 4600 \$PPP in peer countries such as Turkey.<sup>11</sup>

Public investment in education is not just low; it is distributed in a manner that disadvantages the lower grades, which are critical for developing a learning base, and the poor, especially outside urban centers. For example, total salary spending per student in secondary education is more than double that of the primary level, or 104% higher, whereas it is only 16% higher in OECD countries (World Bank, 2022b, 23). Since the 2000s, studies have noted that low educational spending in less-favored governorates leads to low quality of education and, hence, low earnings for education (El-Baradei & El-Baradei, 2004).<sup>12</sup> The absence of equity consideration in educational spending across governorates and the large disparities in teacher wages have been documented in more recent studies (MOE, 2010; OECD, 2015; Egyptian Initiative for Personal Rights (EIPR), 2021). The education budget process is primarily based on historical spending, weakly connecting to learning outcomes and equity targets, limiting the scope for lower levels of government to respond to urgent school needs (World Bank, 2022b, 27). Spending is also skewed towards university education at the expense of pre-primary and basic education (see Assaad, 2010; MOE, 2014; OECD, 2015). Most spending on pre-university education is allocated to salaries—92%, while 6% goes to purchases of goods and services and 2% goes to school construction and maintenance (World Bank, 2022b). The average for MENA is 82% and the global average is 71% (World Bank, 2022b, 22). The large share of staff salary 'is not caused by high pay for teachers, but is rather a reflection of insufficient overall spending' (World Bank, 2022a, 20). However, much of this salary expenditure does not go to teachers, especially those working in the classroom. The non-teaching staff rates have been historically high (0.78:1 compared to 0.58: 1 in OECD countries); and overstaffing increased over the 1990s (El-Baradei & El-Baradei, 2004). In 2022, practicing teachers accounted for approximately two-thirds of teachers and 44% of staff in public schools (not counting regional and central administrative staff) (see [Figure 2](#)).

### **Poor school infrastructure and short learning time**

The condition of schools has suffered greatly from this low inequitable spending in terms of poor infrastructure, very low teacher pay and very high classroom and teacher shortages. Recent official estimates

point to the need to construct over a quarter of a million new classrooms (AbdelBaset, 2018). School infrastructure suffers from systematic deficiencies that affect student learning, attendance, health and dignity, including massive shortages leading to high densities, overcrowding and multiple shift schools, very poor maintenance and a mismatch between needs and actual construction projects (Sobhy, 2019). Egypt's average classroom density of 54 students/classroom in public schools (MOE, 2022) in the primary stage is higher than the average in populous countries like India and China; more than 75% of Egyptian students are in classrooms that have over 40 students and over 60% of children are enrolled in shift schools that have over-capacity classrooms, a smaller time window for learning and are deprived of (supposedly) less essential classes such as arts, music and physical education (MOE, 2023; Sobhy, 2019). However, existing aggregate figures do not offer enough detail for appreciating the equity and learning implications of classroom shortages, in terms of the distribution of shortages across rural and urban areas. There is however clear indication of differentiation based on educational stages, where the average student classroom ratio of 56 in the primary stage decrease by 38% to reach 34 in general secondary (World Bank, 2022b, 19). While part of the problem can only be solved addressing issues around regulations and land allocation (Sobhy, 2019), the other policy alternative of classrooms being served by two or more teachers in the early grades has hardly been discussed. Instead, teacher shortages have exploded over the past few decades. An often-ignored element relates not only to reduced learning time because of multiple shifts, but also because the school year in Egypt (even for privileged full-day school) is very short, that is *33-45% shorter than the school year in other countries*. The school year in Egypt amounts to only 120 days, compared to 180 days in the United States, around 190 in Germany, Singapore, and Shanghai, 210 in Japan, and 220 in South Korea.

### **Low teacher pay and high teacher shortages**

Low salaries have long been a challenge to attract and retain the right skills, thereby also affecting motivation or forcing many to seek second jobs in private tutoring (World Bank, 2022a). However, accurately assessing teacher salaries and their evolution over time remains challenging in the absence of official data. Like other government employees, teachers' salaries have fallen substantially in real terms since the 1980s.<sup>13</sup> The average gross monthly salary in 2021 could be estimated at approximately EGP 5,600, which corresponds to USD 335 and 1230 \$PPP.<sup>14</sup> However, subsequent waves of currency devaluation and inflation between 2022 and 2024 have again rapidly depleted the real value of these salaries. Egypt's teacher salaries representing 1.1 of GDP per capita are lower than those in peer countries such as Turkey (1.5) and Jordan (2.5) (World Bank, 2022a, 20). They are also lower than estimated figures for other North African states, like Morocco (3), Tunisia (2.5) and Algeria (2) (Sobhy, 2024b). In most middle and low-income countries, teacher salaries represent 2 to 7 times GDP per capita (Sandefur, 2018). Finally, there is no recent information about variations across governorates, as salaries in a handful of governorates, including the capital, have historically amounted to more than double the national average (see MOE, 2010; OECD, 2015, 184).

A freeze on hiring has led to an accumulation of teacher shortages over recent decades that is especially disadvantaging the foundational stages. In October 2019, the Ministry of Education admitted to a massive shortage of 300,000 teachers, and 320,000 in 2021 (World Bank, 2022b, 18), while recent statements indicated shortages of over 350,000 teachers. The hiring freeze is leading to an aging of the teacher profession and shortages are compounded by the retirement and exit of teachers. From 2019 to 2022 alone, the number of public school teachers declined by 82,500, as the number of students increased by 1.6 million (see MOE, 2020a and MOE, 2023). Aggregate teacher shortages say little about the serious problems of poor distribution of qualified teachers in ways that especially disadvantage the lower grades (see MOE, 2014), as well less advantaged regions and towns. For example, while the number of primary stage students increased by approximately one million from 2019 to 2022, the number of primary teachers dropped by 31 thousand over the same period (see MOE, 2020a and MOE, 2023). We do know that student teacher ratios are far higher in primary than in the secondary stage. Student teacher ratios of 32 in the primary stage decrease by 46% to reach 17 in general secondary (World Bank, 2022b, 19). More disaggregated and detailed data is therefore needed to better understand the

distribution of shortages across regions, educational stages and subjects, and their intersections with learning and inequality. However, the question of teacher distribution has to be seen in light of the informal privatization described in the following sections, where teachers depend on income from private tutoring and therefore struggle to be assigned or transferred to the secondary stage where tutoring is more pervasive and to urban areas where it is more profitable.

### ***Pervasive informal privatization***

Poor and declining public spending on education has forced families to privately finance education on the formal and informal markets. Formal privatization, as reflected in the ratio of students enrolled in private schools, has seen a slow increase from 8% in 2002 to 9% a decade later in 2012 and 11% by 2022.<sup>15</sup> Over the past few years there has been a more rapid privatization, especially in the secondary stage. The ratio of students enrolled in private technical schools has *more than doubled over the three years* from 2019 to 2022 from 3 to 6.5%, while private enrollment in general secondary *increased fourfold* from 2006 when it absorbed less than 5% of students to 20% in 2022, having increased 4% from 16% in 2019.<sup>16</sup>

While official enrollment remains predominantly in public schools (89%), most of the private spending on education occurs informally in the form of private tutoring. Enrolment in private tutoring is difficult to estimate and differs greatly across educational stages and tracks. For the bulk of students in primary and preparatory stages, tutoring enrolment has been estimated in 2012 at 43% and 61%, respectively (Elbadawy, 2014). Recent data shows that throughout pre-university education, at least half the students hire private tutors (Egypt Labor Market Panel Survey (ELMPS), 2018). Enrolment reaches 73% for the 9<sup>th</sup> year/final year of the preparatory stage (Moreno Olmedilla, 2021).

Official figures indicate that private tutoring takes up 28.3% of household expenditure on education (CAPMAS, 2021b). However, estimates of the actual volume spending on tutoring vary widely, as it is essentially largely informal. A former minister of education had estimated spending on tutoring at 47 billion, other sources have placed it at EGP 60 billion in 2022 (Salama, 2022), and others reported much higher figures of tutoring spending of 136 billion (Alternative Policy Solutions (APS), 2023). I suggest a rough and conservative estimate of EGP 37 billion in private tutoring spending and EGP 130 billion in total private spending on education (including transportation, supplies, private school fees, and other expenses).<sup>17</sup> However, these conservative estimates still represent an exceptionally high level of private spending on education. Based on these estimates, total private spending on pre-university education in Egypt is roughly *130% of public spending*.<sup>18</sup> For reference, average private expenditure on non-tertiary education in OECD countries is 10% (OECD 2020).

Tutoring has created a system that is both inequitable and expensive, a fact that has long been realized, including by key international organizations (World Bank, 1996, Annex 2). The prevalence of tutoring further disadvantages poorer students, as only 32% of students in the lowest wealth quintile receive private tutoring, compared to 55 and 67% in the top two quintiles respectively (Moreno Olmedilla, 2021). Moreover, the inequality applies to teachers themselves and the working conditions of tutoring particularly disadvantage female teachers (Sobhy, 2023b).<sup>19</sup> Finally, the pervasive reliance on formal and informal privatization to compensate for the disinvestment in education has not prevented the steep decline in quality over the past decades. Public disinvestment and privatization have only been correlated with poor learning.

### ***Empty and violent schools***

Finally, there is little data on the related widely noted phenomena of physical punishment, truancy/absenteeism and teacher shirking (teachers entering classes but effectively not teaching the material). Earlier research had already pointed to the emptying and de-facto privatization of secondary schools (Sobhy, 2012). Qualitative research has found that as many as half of classes in less privileged schools end up without teachers, in addition to widespread forms of shirking (Sobhy, 2023b). Very high levels of corporal and emotional punishment accompanied the spread of this type of privatization coupled with

overcrowded and under-resourced classroom conditions (for detailed discussion and statistics, see Sobhy, 2023b). With the 2011 uprising, levels of harsh corporal punishment reportedly witnessed a notable decline with possibly enduring effects (Sobhy, 2023b, 216). A recent survey indeed suggests a marked decline in reported physical punishment.<sup>20</sup> This would constitute a positive development, although 34% of students still report physical punishment being practiced, with 10% reporting it being practiced frequently or every day (Egypt Labor Market Panel Survey (ELMPS), 2018). However, this apparent reported decrease in punishment requires careful investigation, as it also corresponds with *massive* reported absence from school. In the same survey, three quarters of students reported being absent from school the previous week, with 80% reporting being absent for 5 days and a further 15% not knowing exactly how many days they were absent (Egypt Labor Market Panel Survey (ELMPS), 2018).<sup>21</sup> If informal privatization has so pervasively emptied schools even at the primary and preparatory level, the decrease in reported punishment appears less reliable and impressive, if students attend school so infrequently.

### ***The learning crisis in numbers***

Figure 5 brings together the available data that reflect the key drivers and manifestations of the learning crisis. There are grouped into three necessarily overlapping categories: (1) resources, (2) equity-related indicators and the resulting (3) learning and quality related indicators. Future changes in the situation of learning and equity should be reflected in changes in these numbers. Other indicators should also be added when additional data is made available, for example on the distribution of teacher and classroom shortages across stages, subjects and regions. Gender related indicator are essential across all elements of learning, but as official figures do not indicate significant gender differences in Egypt, these are only reflected in one indicator here. It is now possible to ask what has led to this state of education. What political economy dynamics can explain the public disinvestment in education in Egypt?

### **The politics of education in Egypt: between democracy, equity and the transnational**

This section outlines the evolution of the key parameters that may be driving the learning crisis in Egypt: democracy, institutions, equity and the transnational. It seeks to assess how these variables can help us understand the current learning crisis in the country.

#### ***Democracy and regime power base***

In line with the literature in the first section, the greatest advances in education in Egypt did not correlate with democratic governance. The political context in Egypt since the postcolonial era can be characterized as a dominant system, with limited competition for power despite key moments of rupture. After independence from the British in the 1950s, the Nasser regime (ruled 1952-1970) understood state schools to be central to establishing and maintaining the new post-independence political order (Ibrahim, 2010). Equity, social justice and the expansion of social services were key elements of the policy directions and legitimizing narratives of the Nasser regime (Adli, 2007; Brand, 2014). This historical era can be seen as closely paralleling Kosack's characterization of investment in education being made by leaders who rely on a wide popular support base. This support based narrowed significantly over the Sadat and Mubarak era with the beginning of economic liberalization. Mubarak (1981-2011) built on and advanced the authoritarian legacy he inherited from his predecessor.

The 2011 uprising that led to the removal of Mubarak is a watershed event in contemporary Egyptian history. The uprising was followed by a democratic opening where freedom of expression and association witnessed a clear blossoming, and significant concessions were made with regard to selected socio-economic demands, including two waves of salary increases for teachers. The short period between January 2011 and January 2013 witnessed different political settlements in terms of their exclusionary/inclusionary nature and alliances between the army and Islamists or Islamists and the non-Islamist opposition (see Tadros, 2017). However, against the backdrop of massive demonstrations in 2013, the army removed the elected Islamist president, paving the way for a new order. Since then, the military has

been involved in the reproduction of the regime and the establishment of a neoliberal order through its activities (Abdelrahman, 2015). The current regime can be characterized as dominant personalized relying heavily on the loyalty of military, judiciary, police and business elites (Adly, 2017) and has been implementing a form of 'statist neoliberalism' (Khalil & Dill, 2018), with the expansion of the role of the army in the economy, continued privatization and reduced investment in social sectors. If this narrow section of elites is the power base the regime relies on to stay in power, it might be possible to understand the rapid disinvestment in education. The educational preferences of such elites revolve around choosing between varieties of private schools (see Aboulfetouh, 2011).

Therefore, if one were to ask Kosack's (2012) two questions for the current Egyptian context: 1) whose support does a government need to stay in power? 2) What sort of education do those citizens want? According to the existing literature, the answers would be: 1) a very thin segment of affluent elites as well as upper middle-class families who already enrol their children in private schools and 2) They want better and more affordable *private* education, especially in international schools (international schools currently account for 0.5% of students). In fact, under the banner of 'equity,' the Egyptian Ministry of Education has actually started building *private* international schools for the echelons of the upper middle classes that cannot afford existing international schools.

### ***Institutions and rule of law***

Corruption and informality were defining features of the late Mubarak era, with corruption reaching unprecedented levels by global standards (Chekir & Diwan, 2015). The size of the informal sector in Egypt, in which workers have no legal protection, has increased continuously since the 1980s, representing an estimated 70% of economic activity (Elshamy, 2018). Studies have suggested that over the period from 1995 to 2018, corruption has had a negative and significant effect on human development (Emara, 2020). However, it has also been noted that other economies have been able to meet popular expectations for better standards of living in the absence of formal market institutions such as the universal rule of law (Adly, 2020).

### ***Equity and privatization***

The expansion of both tracking and privatization have their roots in the Sadat era. Educational goals in the Sadat era also began to emphasize adjustment to the market liberalization and the expansion of technical education to absorb 60% of secondary students (Adli 2007; Brand, 2014). Mubarak's policies of structural adjustment and economic liberalization entailed a retrenchment of the state from social protection, basic infrastructure and public service provision. Social expenditure lagged far behind rapid population growth, declining from 34% of GDP in 1982 to an average of 17% in the 2000s (El-Meehy, 2009, 14). By 2004, an ideologically committed neoliberal faction within the ruling party, aligned with transnational capital, was able to establish its hegemony, form government and accelerate the implementation of the neoliberal agenda, resulting in rising income inequality and growing popular discontent (Joya, 2020).

From 2002 onwards, under the leadership of Mubarak's son Gamal, official papers of the ruling National Democratic Party (NDP) began to claim that the state's provision of basic services had led to deterioration in their quality, and that the solution was to open education and health to private investment. The so-called 'New Thought' of the party involved finding ways to divest the state from its 'burdens' on those fronts. At that stage, with the removal of long serving minister Hussein Kamel Bahaa ElDin, the Ministry of Education also lost its 'old guard,' ending the influence of figures linked to the secular left on the ministry. A new wave of pro-business liberalization and privatization began around 2003 with the appointment of the Nazif government—which was removed by the January 2011 uprising.

Article 19 of the 2014 Constitution mandated that government spending on the education sector be '[E]qual at least 4% of GDP,' which rises gradually to reach international standards. However, as described in the preceding section, spending dropped to *half* its former levels. Despite the policy changes that followed the uprising, the neoliberal direction of austerity, subsidy reduction and privatization returned very quickly to the agenda, articulated as the only way to access international credit and prevent

bankruptcy. In the period following the 2011 uprising, the resilience of neoliberalism has been explained in terms of the role of dominant economic ideas, the influence of international financial institutions in policy making and the challenging domestic political environment (Adly, 2021; Joya, 2020). Many of the positive changes in the socioeconomic sphere after the Revolution were reversed. For example, by 2018, the effects of the introduction of a minimum wage in 2012 and teacher salary increases had been wiped out in real terms by the inflation unleashed by the currency devaluation that came with a new IMF loan in 2016 (Sobhy, 2023b).

### ***Transnational dimensions***

Transnational influences on Egyptian education in terms of ideas and technical advice existed under colonialism and in the early postcolonial years (Makar & Abdou, 2021). However, the Sadat era (ruled 1970-81) brought a new phase of the involvement of international agencies in educational policy-making (Adli, 2007). Under Sadat, foreign financial support in the field of education became far more significant through USAID and the World Bank, along with several other international organizations (Ibrahim, 2010). Egypt has topped lists of development assistance recipients since it signed the Camp David Peace Accords in 1978 (Ibrahim, 2010). By 1980, Egypt became one of the primary beneficiaries of US development aid programmes (Cochran, 2008). The international donor community played an increasingly significant role in disseminating and incorporating global discourses into Egyptian education. Chief among those have been discourses in relation to decentralizing the system and promoting civil society participation in education (Ginsburg et al., 2010), enhancing teachers' use of active-learning pedagogies (Ginsburg & Megahed, 2008), integrating technology into teaching and learning (Warschauer, 2004), and expanding private provision of basic education (Sayed, 2006). The key policy support teams in the Ministry received training, scholarships and study abroad programs from key international agencies. In 1991, following the first Gulf War, development assistance to Egypt amounted to US \$4.6 billion, which represented around 10% of the total development assistance (for education and other sectors) in the world (Sayed, 2005). By 2020, Egypt remained the third highest recipient of U.S. aid, after Israel and Jordan, with 2% of assistance directed to education and social services (AmCham, 2020). Major multilateral and unilateral development agencies continue to actively operate in the education sector in Egypt, although there is limited tracking of the current or cumulative level of transnational funds invested in the sector. However, to give one indication, in 2022, USAID alone had 6 projects running in the education sector with a total cost of about USD 200 million (United States Agency for International Development (USAID), 2022). This amount from only one development partner represents about 4% of the education budget (in a context where 92-94% of the budget is devoted to wages). Recent research has shown how particular sets of reforms championed by international agencies, like decentralization, community schools, public-private partnerships and school-based management, remained central to education reform agenda in Egypt over the period 1990–2016 (Allam, 2021). Despite decades of support from the international community and the increasing influence of global educational discourses, Egypt's educational reforms have met little, if any, success and have left the Egyptian education system with its current shortcomings: traditional methods of teaching and learning, rigid centralization, and high-stakes exams (Ibrahim, 2010).

Egypt's debt has gone through various cycles culminating in a current phase of crisis resulting in rising inflation rates, as well as severe austerity measures, among them slashing subsidies, rolling back public services, and broadening indirect taxation (Adly & Meddeb, 2023). The country's foreign debt *quadrupled* over eight years and domestic debt is immense, reaching 92% of the banking sector's total deposits (Alternative Policy Solutions (APS), 2024). Recent official statements acknowledge the billions of pounds needed to truly address educational reform but underline the inability to meet constitutional mandates given the ongoing fiscal crisis and debt repayment burden.

### **Conclusion**

The literature on political settlements has attempted to link political variables to the adoption and implementation of learning reforms by examining the concentration of power and the functioning of the bureaucracy, rule of law in different settings. However, existing evidence suggests that such typologies

cannot account for either political *commitment* or *capacity* to successfully carry out learning reforms. Other political variables that have more promise in explaining the adoption of learning reforms include commitment to equity among political elites, transnational factors and the existence of political entrepreneurs who are able to rally the support of the poor. This article examines these arguments in the case of Egypt by tracking the evolution of its political settlements and their impact on the education sector over the past three decades.

It shows that degree of authoritarianism is a poor candidate for explaining investment in education or related changes to student learning. Investment in education has been high under authoritarianism as well as witnessing short-lived improvements in the brief democratic opening after 2011. Here, changes in the degree of dominance, competitiveness as well as enduring personal top down leadership have not correlated with differences in investment in education or its measured outputs. Even if recent literature has concluded that it is difficult to link rule of law to improved learning (Levy, 2022), the case of Egypt underlines the importance of further investigation into questions around the strength of institutions as they relate to informal privatization in particular, so that weak rule of law acts as an intervening variable that *results from and accentuates* existing policy decisions.

Two major changes do correlate with the deterioration of the condition of education in Egypt. The first change is a clear ideological change that has been called neoliberal, but specifically implies a progressively lower commitment to equity and to public education, or what I call the defunding of public education. This change has translated into the steep decline in public investment in education, expansion in the formal and informal privatization of education and massive private spending on education, representing roughly 130% of public spending (compared to 10% in OECD countries). Informal privatization has correlated with a rapid deterioration of learning outcomes for students, releasing evidently negative incentives for learning in the system. In such contexts, technocratic debates about which policies are adopted or abandoned (including globally promoted reforms like alignment or the use of technology) can therefore obscure the more fundamental features of the system, as in the EGP 729 billion deficit in education spending accumulated over only four years. In fact, the emptying of schools through informal privatization raises serious questions about what exactly is being measured in international learning assessments or any other school or national exam. It is not clear whether such tests can capture the performance of the public system or its teachers, now expected to be held to greater accountability, as opposed to measuring learning that happens in private tutoring. More specifically, it is not clear whether the next planned national learning assessment in Egypt can capture the impact of the new reforms (Edu 2.0) as envisioned, or would simply be documenting the learning attained in the shadow system, as shaped by the financial commitment that families, in the context of a severe financial crisis, are able to make to the informally privatized education of their children.

The second change that correlates with the learning crisis in Egypt involves the transnational factors that drive austerity, privatization and a particular global educational agenda, sometimes referred to as GERM (Sahlberg, 2006). In various part of the global South, countries that have implemented IMF structural adjustment and heavily indebted countries have witnessed decreased educational spending and reduced chances for children to complete education. The case of Egypt shows how attempts to implement elements of GERM have only correlated with further and steeper decline in learning, despite decades of large multilevel projects by various key international agencies in a country that remains the third largest recipient of US aid worldwide. The transnational dimension also includes the impact of debt and repayment conditionality on the state's commitment to education. Egypt's experience, where education spending has dropped in half and debt has quadrupled, equally demonstrates the severe adverse effect of consecutive waves of debt and austerity on the education sector.

Acknowledging the impact of debt and isomorphism on education is especially critical in light of the insistence on the duty of governments of the global South to align, digitalize and privatize to address the learning crisis, with little regard for how debt conditionality undermines the very foundations of public education, and how global reform prescriptions often obscure their importance. In sum, the case of Egypt underlines how the domestic and transnational influences that undermine commitment to equity and the capacity for strong public investment in public education are the key correlates with the learning crisis, as opposed to other factors proposed in the literature. It points to key mechanisms through which such influences are shaped and reinforced, including levels and forms of privatization, the

absence of pro-poor political entrepreneurship and a geopolitical context that facilitates transnational-financial and policy-borrowing. Nonetheless, the idea that democracy has not been a precondition for investment in education in the past (globally or in Egypt), does not mean that democratization would have no impact on education policy in the future. Consolidated democratization should have a positive impact on the sector *if* it produces conditions where new leaders have a strong commitment to equity, mobilize the poor as a support base and exercise prudence in drawing upon international debt and policy advice.

## Notes

1. Author's representation of assumptions in the literature on the factors shaping education policy.
2. While the reforms are not codified into their own document, their key elements are reflected in the 2014 Strategic Plan (MOE, 2014) and the Egypt 2030 vision, as well as in the relevant World Bank loan agreement (World Bank, 2018). For more detailed analysis of the reforms see, (Moustafa et al., 2022; Sobhy, 2023a; Sobhy, 2024a).
3. Permissiveness refers to "the selective de jure and de facto retraction of legal and institutional protections and regulatory enforcement, and the nurturing of these patterns in a process of de-stating the state" (Sobhy, 2023b, 211).
4. The public service remains the employer of choice for educated women in Egypt and other Arab countries (Barsoum 2021) and the Egyptian public sector has a relatively equitable gender wage structure, except for the top jobs (Said et al., 2022).
5. These figures refer to public schools only and do not include staff working at the central MOE offices and educational districts (Mudirriya, Idara and Diwan al-Wizara). Data obtained from (MOE, 2023). The overall ratio of practicing to non-practicing teachers for public schools in 2022 is 2 (MOE, 2023).
6. Net and private enrollment rates are obtained from official MOE data for the year 2022/2023 (MOE, 2023).
7. The transfer rate from preparatory to technical education is 72% in urban areas and 22% in rural areas; and from preparatory to general secondary is about 57% in urban areas, including Cairo, and 23.5% in rural areas (MOE, 2020a).
8. Figures refer to the year 2019/2020, the most recent year for which Azhar figures are available *and* private enrollment is disaggregated by type of school (MOE, 2020b). Enrollment in MOE-supervised schools is obtained from official MOE data (MOE, 2020a,b) and enrollment in Azhar (religious) secondary schools is obtained from the national census (CAPMAS, 2021b).
9. Figures on public spending on education have been recently confounded by a "unique accounting formula," which adds a proportion of the government's public debt service and repayment to the education budget (World Bank, 2022a), artificially inflating expenditures on education to appear to reach the constitutional minimum of 4% of GDP (Egyptian Initiative for Personal Rights (EIPR), 2021). Based on this new formula, the pre-university budget was declared as 256 billion in 2021/2022 (MOF, 2022).
10. Author calculation based on expenditures on pre-university education and total public expenditures obtained from the 2018–2019 state budget (MOF 2018) and GDP from the website of the Ministry of Planning and Economic Development. Spending as a percentage of GDP and as a percentage of government expenditures in 2010 are obtained from official sources (MOE, 2010).
11. Before the introduction of the new accounting formula inflating spending figures, public spending on pre-university education in 2018/2019 was EGP 88.7 billion (Ministry of Finance (MOF), 2018) and 20.1 million students were enrolled in public schools.
12. A comparison of the governorates' shares of pupils enrolled in education to the governorates' shares of current educational expenditures indicates that the most disadvantaged governorates are in Upper-Egypt (Fayoum, Minya, Assiut, Sohag), as well as rural Lower Egypt governorates, while the most favored governorates are Metropolitan governorates (El-Baradei & El-Baradei, 2004).
13. Low wages are at the core of Egypt's economic and social problems and public sector wages have been declining in real terms for decades (Abdelhamid & Baradei, 2010).
14. In the absence of official data, I build on the reported ratio of teacher salaries to GDP/capita (World Bank, 2022a, 20) to estimate the average teacher salary in EGP, USD and PPP.
15. My calculations based on MOE Statistical Book since 2002.
16. My calculations based on MOE (2023) and Ministry of Education (MOE) (2007).
17. I build on the official Household Income, Expenditure and Consumption Survey for 2019/2020 (HEICS), which details education and tutoring expenditures for households with members enrolled in education.
18. This estimate is based on the pre-university public spending of the previous year 2018/2019 of 88.7 billion (Ministry of Finance (MOF), 2018), which is the latest figure before the inclusion of sovereign debt repayment in the official education budget.

19. In a survey of primary and preparatory stage teachers, 1% stated that they make EGP 10,000 to 15,000 per month from tutoring income, 3.7% stated EGP 5,000 to 10,000, while the vast majority, around 96.2% make less than EGP 5,000 (Central Authority for Public Mobilization and Statistics (CAPMAS), 2014).
20. The most recent 2018 survey does not disaggregate physical punishment by stage of education like the 2012 version. However, primary and preparatory students, of whom 80% and 70%, respectively, had reported physical punishment in 2012 (ELMPS 2012), represent the majority of students. This implies that the 2018 overall level, with 66% of students responding No or Rarely to whether students are subject to physical punishment (Egypt Labor Market Panel Survey (ELMPS), 2018), indicates a clear and rapid decline in physical punishment in primary and preparatory.
21. Unfortunately, truancy was not reported in ELMPS 2012.
22. Data on classroom density, students in shift schools and the percentage of students in the technical track is obtained from the 2022/3 MOE Statistical Book (MOE, 2023). The percentage of students who cannot read with comprehension is based on the Learning Poverty indicator (World Bank, 2022c). Enrolment in private tutoring is based on the latest available figures (Egypt Labor Market Panel Survey (ELMPS), 2018). The literacy rank is from PIRLS 2016 and Mathematics and Arabic scores are from G4NAMA (MOE, 2022), which is drawn upon for the ratio of rural to urban learning scores. The HCI score of 0.5 for 2020 is obtained from the World Bank indicators online database. Teacher and classroom shortages are based on recent official statements, see previous notes. The pre-university education budget as a percentage of GDP and as a percentage of public expenditures are based on the Ministry of Finance national budget data for 2018 and refer only to non-tertiary education (see previous notes). The ratio of poorest to richest preprimary enrolment draws on the latest enrolment differentials (World Bank, 2022b). Average teacher salary is estimated based on World Bank data (see previous notes) and refers to 2021 salaries prior to waves of currency devaluation and inflation since 2022 and a public sector pay increases announced for 2024. Absence from school is based on a 2018 national survey (Egypt Labor Market Panel Survey (ELMPS), 2018).

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