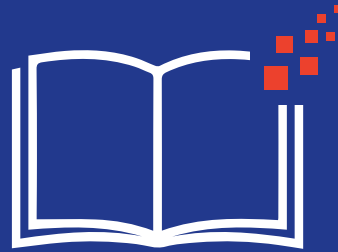


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The Education System Transformation (TEST)

How a revolution in education in the Middle East
will shape the sector post-coronavirus.



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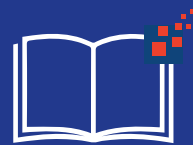


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MAY 2020



The closure of schools in over 177 countries around the world has affected approximately 1.3 billion learners—nearly 72.4% of total enrolled learners worldwide—according to UNESCO. This has **disrupted traditional methods** of education and led to a shift towards distance learning platforms. Providing **e-learning tools** has become a key priority for countries worldwide to guarantee the continuity of learning.

Having taken an in-depth look at e-learning—including where we are at the moment and what could happen as a result of the far-reaching impact of the novel coronavirus—here are some predictions.

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1 Current Situation Quick adoption

Digital learning is being adopted fast. Some Arab countries have been quick to take action, **and are providing alternative learning tools** using e-learning platforms and TV channels. However, others have been much slower due to internet capabilities and other barriers.

Saudi Arabia launched a comprehensive system in March, which includes 20 TV channels, a YouTube channel, and an iEN National Educational Portal.

In the UAE, the Ministry of Education, in cooperation with the Hamdan Bin Mohamed Smart University, provided a free course in March on how to become a distance teacher in 24 hours. As of March 16, more than 42,000 people had undergone and completed the online training.



Dr. Mansoor Al-Awar, Chancellor of HBMSU

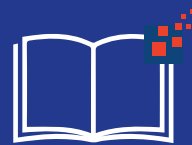
Image from (HBMSU) website



2 Challenges at all levels

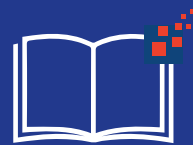
With subscriptions and other online payment models in use, the best online courses can still be perceived to be the most expensive. Where the internet is an open source, users can be manipulated by corrupt parties. Corporates can try to bombard students with adverts and marketing. **Privacy, security and regulatory measures need to be tough and universal.**





Studying together with their peers teaches students soft skills, enables them to form human bonds, and enriches them far beyond just acquiring knowledge—and we know that living virtually through social media is not a suitable or sufficient substitute. E-learning from home cannot fill this gap, and efforts need to be made by students and parents to **ensure real-life human connections are still made, encouraged and valued.**

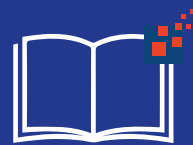




With **less support from schools**, online tutorials also require parents to help teach. This is difficult in households where both parents work, but to address this, and recognizing the advantages learned during the lockdown, companies are introducing **flexible hours, or remote working for staff**.

These and many other challenges are inevitable. All stakeholders in education need to remain alert and ready to focus on solutions.





3 Government support for ed-tech

Education already receives one of the highest budget allotments in most MENA countries. The UAE allocated \$2.8 billion—about 14.8% of the federal budget—to education in 2020, while Saudi Arabia allocated nearly \$51 billion for education in 2020, representing nearly 19% of total government expenditure. However, so far not a lot of it has gone into developing technology. That will change as we emerge from this pandemic, with **governments spending considerably more** on education technology (ed-tech). The value of the UAE's ed-tech market alone is forecast to be \$40 billion by 2022, according to a Dubai Future Foundation report.



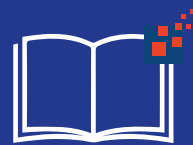


4 Free education

The new system means that **education will no longer be a commercial opportunity for corporates**. Students and parents are not looking for expensive certificates, they are looking for real opportunities and high-quality experiences anywhere in the world that they can access from home. **Free e-learning platforms will continue to arise**, such as Egypt's Nafham and Jordan's Edraak. The UAE's Madrasa, a school platform launched by the ruler of Dubai in 2018, provides 5,000 video tutorials freely to over 50 million Arab students.

Students can currently access free online courses from the world's top universities, including Harvard, Stanford, and Boston.





5 More flexibility and time

With students currently embracing distance learning, the need to move away or travel far to school or university is becoming less necessary. Online education is giving students **more flexibility and time, and providing them with money and energy** to practice other activities. It could also affect international students with regard to searching for opportunities abroad and traveling. Searching for accommodation and spending time obtaining security visas and approvals for some countries could be a thing of the past.





6 Tech-focused next generation

After home-learning during the lockdown, students are more familiar with ed-tech, and **will no longer just be curriculum-oriented learners**. The new generation will be tech-literate and more independent, with experience in new applications for studying. Before this era, only high-standard educational institutions were really using technology, but now it is a must-have for all entities. Young students are learning to use devices for more than just entertainment. **The new generation is developing very advanced skills** at a crucial age where they are able to absorb information and learn quickly.





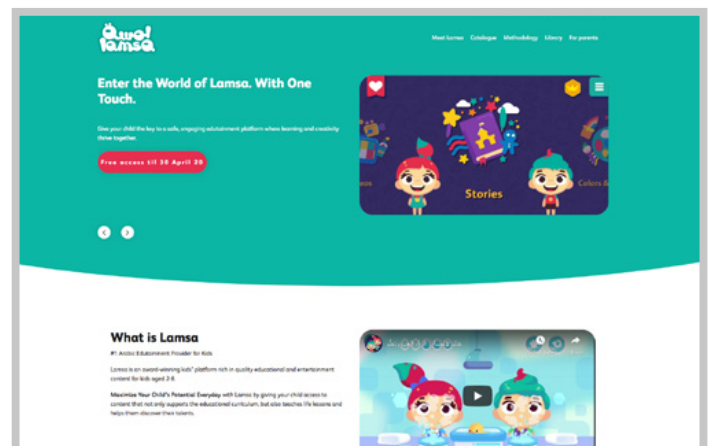
7 Accessible quality content

Digital transformation calls for curriculums to be changed. New learning programs will adopt **smart strategies in building content** using the latest applications from both startups and established players in the market, such as Noon Academy, Lamsa, Little Thinking Minds, and Kamkalima. Creative tools will make teaching and learning more fun, and therefore easier.

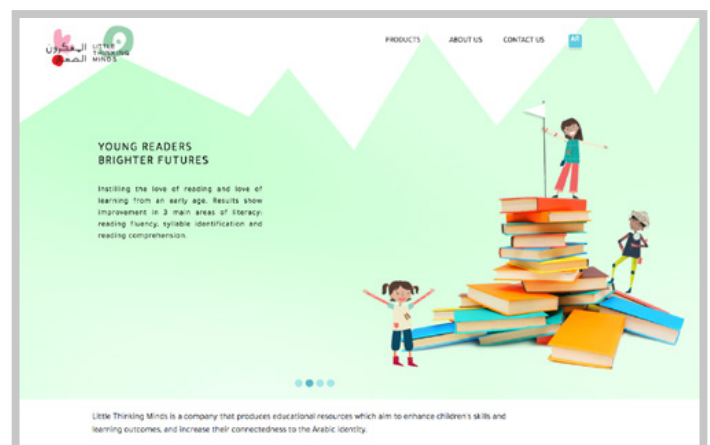
Noon Academy



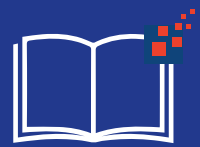
Lamsa



Kamkalima



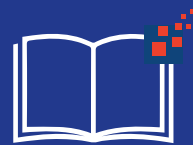
Little Thinking Minds



One crucial point is that this transformation will have the power to improve access to education, **creating more equal opportunities** across cities and villages. Technology will enable students from remote places to access the same quality of education that students in the most advanced countries have. For this to occur, **technical tools** such as laptops, tablets, and internet connections will need to be provided at a lower cost, as they become part of our basic human needs and not luxury items.

According to UNESCO, as of April 21 2020, nearly half of the total number of learners—826 million students—do not have access to a household computer, and about 43% (706 million) have no internet at home.





8 More global competition

Schools, institutes, educators and ed-tech platforms have to **compete with others from around the world**. We will no longer see institutes competing through luxurious university buildings and construction. Universities globally will focus on attracting human talent, using money to invest in providing teachers and professors with a **healthy environment and state-of-the-art technology** to provide high-quality distance education.





9 Creative ideas and smart initiatives

Global technology companies are proving that they are able to offer support. **Amazon is donating 8,200 laptops**, worth more than \$2 million, to elementary students in Seattle public schools to help towards continuous learning during the pandemic. And **Intel is investing nearly \$40 million** in response and readiness tools, and online learning initiatives.



Khan Academy, a free online education platform with more than 6,500 video lessons, has received donations from the likes of Google, AT&T, and billionaire Carlos Slim. Indian entrepreneur, Byju Raveendran's, **freemium-model learning app, BYJU'S—valued today at \$5.5 billion**—has received investment from Mark Zuckerberg, Tencent, and healthcare billionaire, Ranjan Pai. More initiatives will arise from companies in the Middle East.



10 Media and tech partnerships

Media and technology startups are partnering with education providers to **share expertise and give learners the best experiences**.

For example, in March Jordan's Ministry of Education partnered with Abwaab, Mawdoo3, Jo Academy, Edraak and the Ministry of Digital Economy & Entrepreneurship to launch two TV channels and an e-learning platform (Darsak). Darsak recorded more than 23 million views in its first three weeks, according to the Ministry of Education.

Darsak

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موضوع: تطوير

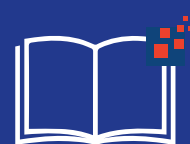
المملكة الأردنية الهاشمية
وزارة التربية والتعليم



دَرَسَك

منصة أردنية مجانية للتعلّم عن بُعد، توفر لطلبة المدارس من الصف الأول وحتى الصف الثاني الثانوي دروساً تعليمية عن طريق مقاطع فيديو مصوّرة مُنظّمة ومُجدولة وفقاً لمنهاج التعليم الأردني، يُقدّمها نخبة متميزة من المعلمين والمعلمات لتسهّل على الطلبة مواصلة تعلّمهم، ومتابعة موادهم الدراسية.





1 What Lies Ahead Infrastructure assessment

The region's educational infrastructure will need to be **reviewed, evaluated and restructured** in a way that supports the transformation in the education system. High-speed internet networks will need to be provided to all for free or at affordable prices. Investment will also need to be made in increasing teachers' technology skills.





For example, the University of Jordan announced in April that it will provide and pay for internet packages for 20,000 of its students. And the Massive Open Online Course (MOOC) platform, **Edraak—an initiative by the Queen Rania Foundation**—announced partnerships with local telecom companies: Zain, Orange and Umniah. This means that users in Jordan will be able to browse content and download study materials without consuming data from their internet packages for active lines on smartphones.



Image courtesy of queenraniastyle.blogspot.com

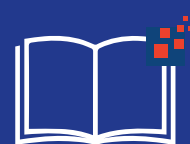
Edraak—a massive open online course (MOOC) platform—is an initiative of the Queen Rania Foundation.



2 Focused activities

Although generic subject learning will mostly occur remotely, the youth will still come together for **team games, socializing, music, and physical activities**. Talent will still need to be found in sports, the arts, athletics, etc. Schools may be converted to recreational centers.





3 Growth in investment

There will be **fewer acquisitions of schools and more investment into startups and technology.**

The global e-learning market is estimated to surpass \$300 billion by 2025, according to a 2019 Global Market Insight report.

The 10 most funded ed-tech startups in the Middle East have raised nearly \$45 million—this amount will increase, and more new companies with **new tech ideas will emerge.** Middle Eastern ed-tech startups will be seen to grow faster than their global counterparts because of a low base effect.



According to a 2019 Global Market Insight report

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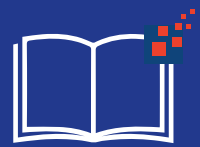
\$45 Million



4 Fewer costs and expenses

With students accessing learning from devices at home, pressure on personal attendance and physical classrooms will reduce overtime. Many costs connected to building maintenance and student supervision, and other costs such as uniforms, travel, transport, housing or visas, will decrease. This will be reflected in the fees. **Budgets can be directed to other areas**, such as field trips and new technology.

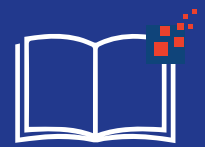




5 New curriculum trends

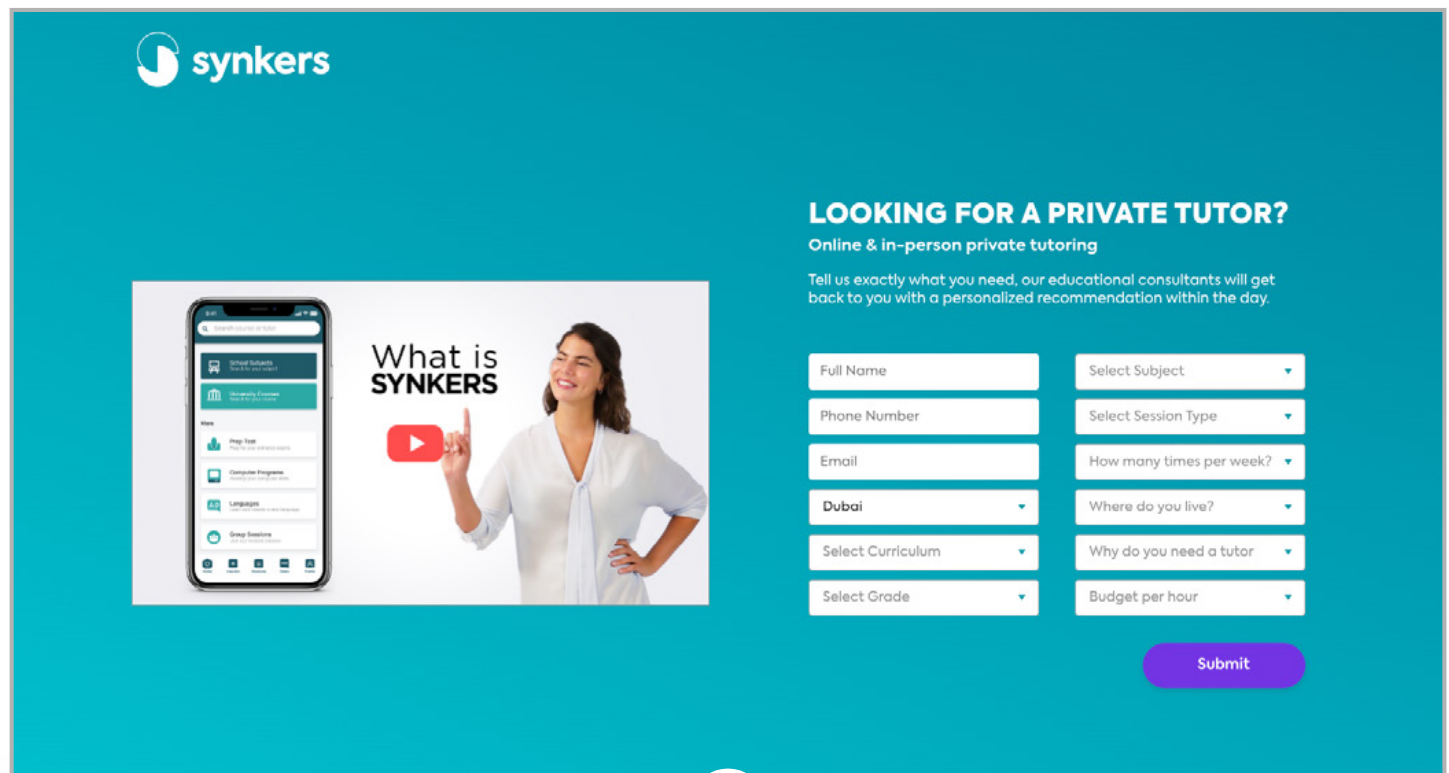
In traditional education systems, every child of the same age learns almost the same curriculum at the same speed, without too much attention paid to their individual interests or aptitudes. At the moment, curriculums are set by each country. In the future, thanks to new **global digital infrastructures**, students will have a choice. They could learn mathematics from America, science from Germany, English from the UK, etc. In the new system, with less focus on formal structure, **students will be able to learn at their own pace** and pay more attention to what they enjoy.





6 Growth in private tutors

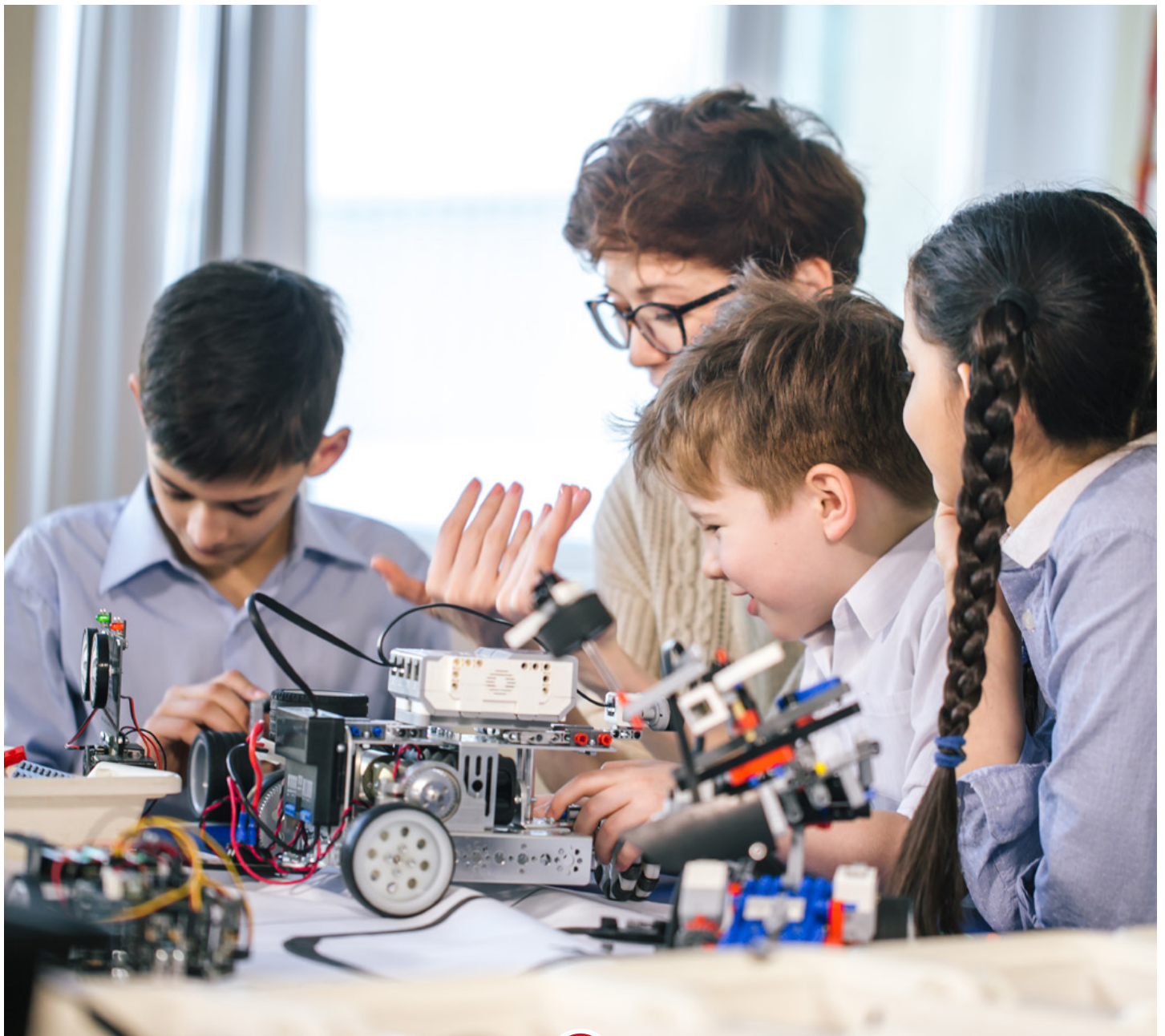
To support e-learning, **private tutors** will be increasingly found and employed—through institutions and apps, such as Synkers in Lebanon and Orcas in Egypt—to **offer tailored assistance** to students across the world and maintain relationships between the individual and their school or home country.





7 Growth in STEM subjects and specialist institutes

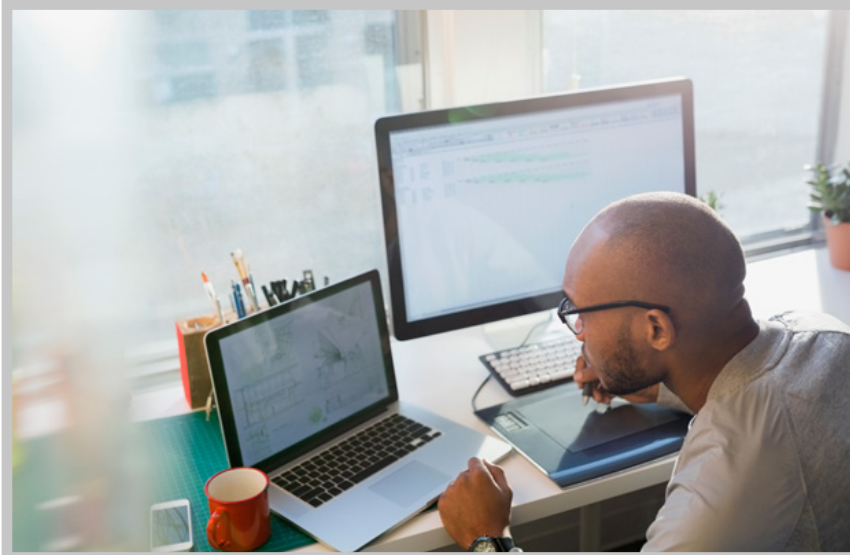
There will be an **increased demand for STEM programs**, at the cost of social sciences, because of changing global demand and evolving job markets.



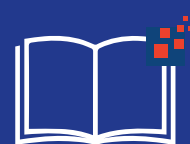


Meanwhile, the demand for **highly-specialist subjects could be filled by corporates** with dedicated infrastructure. For example, Schneider Electric's Energy University offers free online learning courses in several languages. And Mastercard's Girls4Tech program is inspiring girls to build technology skills.

Image courtesy of Schneider Electric Energy University



Images courtesy of Mastercard.



8 Market immunity

The education markets will become immune to sudden change. With the new system based on technology, education at all levels will be able to be accessed and

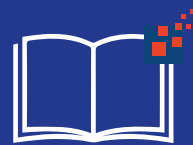


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guaranteed regardless of what else is happening in the world. The system will become **immune to weather conditions, global pandemics, wars, or other life-changing events**—as long as the internet can still be freely accessed.

9 Higher quality of life

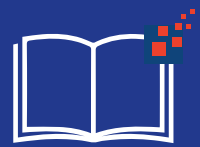
With fewer students commuting, **traffic on the roads will be reduced**. There will be an **increase in international travel** as students and their parents are no longer tied to school term timetables. Families can **relocate as desired** without needing to worry about students staying in their chosen school.



10 Big data

Governments and investors need to seriously consider the changes that must come as a result of lessons learned during the pandemic. If we are looking to advance the world of education, governments need to **allocate a budget for research and development** that will provide **real, credible and transparent big data**. We need to analyze this big data to build a practical and bright future that benefits students and teachers across our schools and universities.





Conclusion and recommendation

Going forward, all stakeholders in the education sector should **embrace e-learning with open arms, putting systems in place to provide it as an alternative and equal option for parents and students to choose.**

This TEST report highlights the need to not hesitate in **making smart investments.**

Now is the time to build on current successes and look beyond traditional education systems to **the future of learning.**

Let's work together to provide **equal education opportunities for all.**

