Global Influences on Educational Plans in the Arab World:

A Comparative Study of Egypt, Jordan, Qatar and Tunisia

Rehab Kazem Ahmed

Master of Philosophy in Comparative and International Education

Department of Education

UNIVERSITETET I OSLO

May 2018
Global Influences on Educational Plans in the Arab World:

A Comparative Study of Egypt, Jordan, Qatar and Tunisia
Global Influences on Educational Plans in the Arab World:
A Comparative Study of Egypt, Jordan, Qatar and Tunisia

Rehab Kazem Ahmed

http://www.duo.uio.no/

Print: Reprosentralen, Universitetet i Oslo

IV
Abstract

This study contributes to the discourse on the interaction of the global and the local in education. It explores how global influences, or forces external to a state’s national boundaries, are manifested in official pre-tertiary education reform documents in the Arab world and the inferences that can be made from such manifestations. This is done through comparatively analyzing the educational plans of four Arab countries: Egypt, Jordan, Qatar and Tunisia, and investigating the factors that can explain their potential convergence and divergence areas. Drawing on relevant literature on global influences on education and using elements of both World Society theory and the Globally Structured Agenda for Education (GSAE) approach, the varying ways by which global forces influence educational planning in the Arab world are highlighted and rationalized.

The texts in the educational plans are analyzed using thematic document analysis to uncover the focal categories of global influence. Findings of the study reveal that supranational organizations, like the World Bank, UNESCO, UNICEF and the OECD play a fundamental role in enhancing global influence in the region, mainly through the production of knowledge and the provision of technical and material support. It is also apparent from the findings that neoliberal ideologies such as privatization, decentralization and performance management prevail as strategies of good governance. In addition, comparison of the plans suggests that both political economy and the extent of cooperation between individual countries and supranational organizations have implications for the way each country positions itself in the world and consequently how it responds to global forces in its educational plans. The study concludes with raising a concern about the ability of these countries to compete in a ‘knowledge economy’, as targeted in their plans, when their dependency on external producers of knowledge is as high as depicted in the study.
Acknowledgements

Praise be to Allah, the Most Merciful, the Most Kind for enabling me to accomplish this piece of work.

A lot of gratitude and thanks is due to all those who have assisted me throughout this long journey. First and foremost, I would like to thank my dear family, my mum, husband and sons for their support and faith in me. My mum’s prayers, my husband’s continuous motivation for me and my sons’ understanding have been the inspiration that kept me going. Thank you all for being such a loving and caring family.

I am also grateful to the CIE program professors: Lene Buchert, Teklu Bekele and Fengshu Liu who have, throughout the courses of the program, challenged, motivated and inspired me. I am sure that they will be very happy to know that this program has been ‘a lot of thinking’ for me. I would also like to thank Camilla Bakke for her continuous support with all the unexpected issues that came up during my work.

Many thanks are due to Iyad Abualrub, my supervisor, who has provided me with valuable feedback and supported me with a ‘24/7 available’ status throughout the difficult final weeks. I would also like to thank my dear colleagues Ida, Konstantinos and Lin for reviewing my work and giving me constructive feedback. I wholeheartedly thank you all for making this thesis, a piece of work that I am proud of.

I am indebted to you all.

Rehab Ahmed

Oslo, May 2018
# Table of Contents

Abstract .......................................................................................... V  
Acknowledgements ........................................................................... VII  
Table of Contents ........................................................................... IX  
List of Acronyms ............................................................................ XIII  
List of Tables, Figures and Maps ..................................................... XV  
1 Introduction .................................................................................. 1  
  1.1 Rationale .................................................................................. 1  
  1.2 Research Purpose and Questions ............................................. 3  
  1.3 The Roadmap to Answering the Research Questions .............. 5  
  1.4 Structure of the Thesis ................................................................. 6  
2 Global Influences Contextualized .................................................. 7  
  2.1 Global Influences - The Concept .............................................. 7  
  2.2 Global Influences - The Constituents ..................................... 9  
  2.3 Global Influences - The Process ............................................. 11  
  2.4 Global Influences - The Actors .............................................. 12  
  2.5 Global Influences - The Empirical Research ......................... 16  
    2.5.1 Identifying ‘Relevant’ Literature ......................................... 16  
    2.5.2 Selective Studies on Global Influences on Education .......... 17  
    2.5.3 Implications for this Study ................................................. 20  
3 Methodology .................................................................................. 22  
  3.1 Research Strategy ..................................................................... 22  
  3.2 Research Design ...................................................................... 23  
  3.3 Sampling .................................................................................. 24  
  3.4 Data Analysis ............................................................................ 26  
  3.5 Reliability, Validity and Ethical Considerations ...................... 28  
  3.6 Limitations .............................................................................. 29  
4 Key Concepts and Conceptual Frameworks .................................. 32  
  4.1 Key Concepts ........................................................................... 32  
    4.1.1 Externalization ................................................................... 32  
    4.1.2 Neo-Liberal Ideologies ....................................................... 33  
    4.1.3 Global Educational Themes ............................................. 37
4.2 World Society Theory .......................................................................................... 40
4.3 The Globally Structured Agenda for Education .................................................. 42
4.4 The Two Approaches within the Context of this Study ........................................ 44
5 The Region, the Countries and the Documents – Backdrop .................................. 49
  5.1 Overview of the Arab World ............................................................................... 49
    5.1.1 Member States, Geography and Demographics ........................................... 49
    5.1.2 The Socio-economic Context ..................................................................... 50
    5.1.3 The Political Context .................................................................................. 52
    5.1.4 Education in the Arab World ...................................................................... 52
  5.2 The Empirical Country Cases ............................................................................ 54
    5.2.1 Egypt .......................................................................................................... 55
    5.2.2 Jordan .......................................................................................................... 56
    5.2.3 Qatar ............................................................................................................ 57
    5.2.4 Tunisia ......................................................................................................... 59
6 Empirical Findings .................................................................................................. 61
  6.1 Externalization .................................................................................................... 61
    6.1.1 International Conventions / Declarations .................................................. 61
    6.1.2 Multi-lateral Organizations ....................................................................... 62
    6.1.3 Regional / Cross-Country Comparisons .................................................... 64
    6.1.4 World-wide Comparisons ........................................................................... 66
  6.2 Neo-Liberal Ideologies ....................................................................................... 67
    6.2.1 Education for Human Resources Development ......................................... 68
    6.2.2 Privatization ............................................................................................... 69
    6.2.3 Decentralization ......................................................................................... 70
    6.2.4 Performance Management Systems ............................................................ 71
  6.3 Global Educational Themes .............................................................................. 73
    6.3.1 The Knowledge Economy and Life-long Learning ..................................... 73
    6.3.2 Skills-Focused Education .......................................................................... 74
  6.4 Emphasis on Cultural / National Identity ............................................................ 74
7 Discussion ............................................................................................................... 76
  7.1 Areas of Convergence ....................................................................................... 77
  7.2 Areas of Divergence ........................................................................................... 78
  7.3 Interpretation of the Convergence / Divergence Trends ..................................... 80
# List of Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Full Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALECSO</td>
<td>Arab League Educational, Cultural and Scientific Organization</td>
</tr>
<tr>
<td>DS</td>
<td>Development Strategy (Tunisia)</td>
</tr>
<tr>
<td>ECED</td>
<td>Early Childhood Education and Development</td>
</tr>
<tr>
<td>EFA</td>
<td>Education for All</td>
</tr>
<tr>
<td>EPDC</td>
<td>Education Policy and Data Center</td>
</tr>
<tr>
<td>ERP</td>
<td>Education Reform Program (Tunisia)</td>
</tr>
<tr>
<td>ESSP</td>
<td>Education Sector Strategic Plan (Tunisia)</td>
</tr>
<tr>
<td>ETSS</td>
<td>Education and Training Sector Strategy (Qatar)</td>
</tr>
<tr>
<td>EU</td>
<td>European Union</td>
</tr>
<tr>
<td>GCC</td>
<td>Gulf Cooperation Countries</td>
</tr>
<tr>
<td>GCI</td>
<td>Global Competitiveness Index</td>
</tr>
<tr>
<td>GDP</td>
<td>Gross Domestic Product</td>
</tr>
<tr>
<td>GNI</td>
<td>Gross National Income</td>
</tr>
<tr>
<td>GSAE</td>
<td>Globally Structured Agenda for Education</td>
</tr>
<tr>
<td>HDI</td>
<td>Human Development Index</td>
</tr>
<tr>
<td>ICT</td>
<td>Information and Communication Technology</td>
</tr>
<tr>
<td>IEA</td>
<td>International Association for the Evaluation of Educational Achievement</td>
</tr>
<tr>
<td>ILSA</td>
<td>International Large-Scale Assessment</td>
</tr>
<tr>
<td>IMF</td>
<td>International Monetary Fund</td>
</tr>
<tr>
<td>KPI</td>
<td>Key Performance Indicator</td>
</tr>
<tr>
<td>MDGs</td>
<td>Millennium Development Goals</td>
</tr>
<tr>
<td>MENA</td>
<td>Middle East and North Africa</td>
</tr>
<tr>
<td>MoE</td>
<td>Ministry of Education</td>
</tr>
<tr>
<td>NDS</td>
<td>National Development Strategy (Qatar)</td>
</tr>
<tr>
<td>NGO</td>
<td>Non-governmental Organization</td>
</tr>
<tr>
<td>NHRSDS</td>
<td>National Human Resources and Development Strategy (Jordan)</td>
</tr>
<tr>
<td>OECD</td>
<td>The Organisation for Economic Co-operation and Development</td>
</tr>
<tr>
<td>PISA</td>
<td>Programme for International Student Assessment</td>
</tr>
<tr>
<td>PIRLS</td>
<td>Progress in International Reading Literacy Study</td>
</tr>
<tr>
<td>SDGs</td>
<td>Sustainable Development Goals</td>
</tr>
<tr>
<td>SDS</td>
<td>Sustainable Development Strategy (Egypt)</td>
</tr>
<tr>
<td>Acronym</td>
<td>Full Form</td>
</tr>
<tr>
<td>---------</td>
<td>-----------</td>
</tr>
<tr>
<td>SPPE</td>
<td>Strategic Plan for Pre-university Education (Egypt)</td>
</tr>
<tr>
<td>STEM</td>
<td>Science, Technology, Engineering and Math</td>
</tr>
<tr>
<td>TIMSS</td>
<td>Trends in International Mathematics and Science Study</td>
</tr>
<tr>
<td>TVET</td>
<td>Technical and Vocational Education and Training</td>
</tr>
<tr>
<td>UN</td>
<td>United Nations</td>
</tr>
<tr>
<td>UNDP</td>
<td>United Nations Development Programme</td>
</tr>
<tr>
<td>UNESCO</td>
<td>The United Nations Educational, Scientific and Cultural Organisation</td>
</tr>
<tr>
<td>UNICEF</td>
<td>The United Nations Children’s Fund</td>
</tr>
<tr>
<td>UPE</td>
<td>Universal Primary Education</td>
</tr>
<tr>
<td>WB</td>
<td>The World Bank</td>
</tr>
<tr>
<td>WCEFA</td>
<td>The World Conference on Education for All</td>
</tr>
<tr>
<td>WEF</td>
<td>World Economic Forum</td>
</tr>
</tbody>
</table>
List of Tables, Figures and Maps

Tables
Table 3.1 List of documents sampled for the study 25
Table 3.2 List of categories and subcategories for thematic text analysis 27
Table 4.1 Key differences between World Society theory and GSAE 45
Table 5.1 Arab Countries’ rankings in socio-economic indices 51
Table 6.1 List of International conventions and declarations referenced in the documents 62
Table 6.2 Country/regional benchmarks used in the sampled documents 65
Table 6.3 Justifications for privatization by country 70

Figures
Figure 7.1 Convergence and divergence areas of global influence 76

Maps
Map 5.1 Map of the Arab World 50
1 Introduction

1.1 Rationale

There seems to be little doubt that globalization is influencing many spheres of modern life, even though the term itself is highly disputed. Globalization is generally used to refer to the worldwide interconnectedness of economic, political and cultural affairs. It is no longer only a matter of what goes on within one state’s national borders that affects it, but rather what goes on elsewhere as well (Arnove, 2013; Giddens, 1990; Verger, Novelli & Altinyelken, 2012). Education is no exception, especially with the increasing worldwide cooperation and communication networks, facilitated by the technological revolution that connected the whole world and the formation of ‘supranational’ organizations that govern many aspects of education around the globe (Arnove, 2013; Carnoy, 1999; Samoff, 2013).

It is not a new phenomenon however, that what goes on elsewhere affects education locally, for the concept of educational borrowing and lending between nations has long been in effect. Nation states have traditionally looked outside their borders for educational models that could be of help in developing national practices (Steiner-Khamsi, 2004). However, this borrowing and lending was characterized by being voluntary and emerging from local educational problems and concerns (Dale, 1999). Globalization, on the other hand, is having a different kind of influence. Supranational organizations are increasingly contributing to defining educational problems and targets and proposing solutions to them (Jakobi, 2012a). International assessments are being widely used to measure the performance of education systems and to rank them in international comparisons (Dale, 2005). The production and possession of knowledge are highly valued and regarded as fundamental requisites for competition in the global economy (Rizvi & Lingard, 2006). Alternative modes of funding education are being sought to lower state involvement and advocate the predominant capitalist approach to development (Jones & Coleman, 2005). These trends have become increasingly hegemonic in educational reform and depending on how particular education systems respond to them, take various forms and models.

The significance of researching global influences on education lies in the fact that the global has become an integral part of the local. That is to say, one cannot study the local without studying the global. Global influences and forces shape and affect local contexts which in
turn respond in different ways, creating multiple models and transformations (Ball, 2006; Dale 1999). Hence, it becomes essential to understand the dialectic (Arnove, 2013) or interplay that exists between the global and the local in each individual context.

A myriad of empirical educational research has tried to investigate the relationship between the global and the local: its governance, processes, significance and impact on local education policy and practice (Steiner Khamsi, 2004). A great degree of variance in the extent and nature of global influences on education was evidenced by this body of research. This has asserted the role that local contexts play in shaping nation states’ individual responses to global forces, and the multiplicity of faces that globalization can have (Tikly, 2001; Samoff, 2013). To some, globalization has created a new set of arrangements for the world order, where state boundaries cease to have the power to control external forces (Carnoy, 1999; Jones & Coleman, 2005), while to others, nation states still retain much power and control over their internal affairs, justifying the various transformations and versions of global influence that exist (Arnove, 2013; Ball, 2006; Hudson, 2007; Rizvi & Lingard, 2010; Singh, 2004).

The Arab world, consisting of 22 countries located mainly in the Middle East and North Africa, is a world region that has not been subject to much empirical research on how globalization influences education. This study contributes to the exploration of global influences on education in this region. It aims to highlight the relationship between publicized educational reforms in the Arab world and what circulates in the international arena as well as examine how educational plans in this region explicitly reflect global influences. The plans of Egypt, Jordan, Qatar and Tunisia are taken as exemplary cases for the analysis. In addition, the study investigates the actors and processes that are involved in the governing of reform priorities in the region, as portrayed in the sampled plans.

Findings of this research serve both scientific and pragmatic purposes. First, the study adds to the body of knowledge. Accounts of the influences of globalization on education have mostly dealt with the industrialized countries of the West and the Pacific Rim (Ball, 2006; Tikly, 2001). However, globalization’s impact varies in different contexts (Dale, 1999). Therefore, research on globalization and education in other areas of the world represents a valuable contribution to knowledge. This research highlights the dynamics of globalization and its
related forces on local education contexts, and adds to our understanding of the workings of globalization in the context of the Arab World.

The Arab World’s long history of poor academic research (Mir, 2013; Tjomsland, 2005) is reflected in the dearth of locally produced literature concerning the topic addressed in this study. The political uprisings that started in 2011 in many Arab countries have worked to exacerbate this situation. The literature search conducted for this study, constrained by time and capacity, acknowledges the existence of some literature discussing globalization of higher education in the Arab world and its impact on the labor market. However, a literature gap appears to exist in the pre-tertiary stages of education, legitimizing this research. Consequently, insights into how global trends in education are affecting the basic and secondary stages of education become worth exploring.

Second, this study contributes to theory building in the globalization and education field. Arnove asserts that as the globalization – education relationship is investigated in new contexts, conceptual and theoretical frameworks evolve as this relationship seems to undergo unique transformations in the different contexts (2013, p. 12), possibly reflecting on the ways power relations play out in this part of the world.

Third, the study highlights how official reform documents reflect the sampled countries’ prospective engagement with the external world at a time that is very critical in the history of the Arab world. Most of the region has gone through political instability in the past few years and two of the four sampled countries have had changes in their political leadership. The educational plans studied in this research are the first to be drafted after the transition period caused by the political instabilities. This enhances the plans’ significance as indicators of the future direction of the respective countries and the region as a whole.

### 1.2 Research Purpose and Questions

As mentioned earlier, this research aims to explore the manifestations of globalization in education in the Arab world through analyzing the most recent educational plans that a sample of four Arab countries (Egypt, Jordan, Qatar and Tunisia) have designed for their pre-tertiary educational reform. These countries, as will be detailed in the methodology chapter, are selected based on their suitability for the study’s purpose and their relative reflection of the general diversity that exists within the non-conflict parts of the Arab world.
The decision to use educational plans as sources of data for the study is based on two reasons: 1) the feasibility of obtaining data pertaining to these countries in a legal and legitimate manner and 2) the time and budget constraints of the thesis. Though educational plans may not be indicative of real educational practices, they do represent an initial framework for publicly announced plans that should reflect, to some extent, what the state is conveying to the public and held accountable for. Therefore, they can well serve the exploratory purpose of this study. Through their investigation, the following research questions will be answered:

1. How and for what purposes do pre-tertiary education plans in the sampled countries reference the world external to their national borders?

2. How do these plans depict the role(s) that supranational organizations play?

3. What ‘global’ concepts and themes are emphasized in these plans?

4. In what ways are the plans similar to / different from each other and what possible factors may be influencing such convergence / divergence?

The first of these research questions aims at exploring how the documents under study explicitly reference the ‘external’ world, in terms of referencing foreign countries, regions, educational systems or supranational organizations. The second question, however, targets highlighting the more implicit or ‘unquoted’ roles that supranational organizations play. These roles can include referring to data originating from their sources or referencing services that they provide. The third question investigates how themes and concepts that circulate in the international rhetoric on education are demonstrated in the documents. The comparative aspect of the study is reflected in the fourth question that aims to analyze the different ways in which globalization influences education plans and possibly reflect on the factors that any evident convergence or divergence may be attributed to.

Educational plans, as interpreted in this study, are documents that lay out the state’s intended actions for educational reform for the pre-tertiary stage of education. The study reviews the most recent plans that are published on official government websites of the selected countries. The documents used are the Strategic Plan for Pre-University Education (SPPE) for Egypt, The National Human Resources and Development Strategy (NHRDS) for Jordan, the
Education and Training Sector Strategy (ETSS) for Qatar, and the Education Sector Strategic Plan (ESSP) along with the Education Reform Project – the White Book (ERP) for Tunisia.

In addition, national development plans that act as the parent plans are also investigated to get a more holistic view of the context of the reform plans. These are the Sustainable Development Strategy 2030 (SDS) for Egypt, the 2025 Vision for Jordan, the National Development Strategy (NDS) for Qatar, and the Development Strategy (DS) for Tunisia.

1.3 The Roadmap to Answering the Research Questions

Having laid out the study’s rationale, purpose and questions, it is useful at this point to outline the main routes and strategies that this thesis employs to approach the study and answer the posed research questions.

To begin with, the basic concept in the research questions (global influences) is defined and contextualized by illustrating what is meant by global influences on education: what does the concept encompass; how and by whom does it occur; and how has it been addressed in the existing literature. This is done by researching relevant literature and framing the context for the ‘global influences’ addressed in the study. This contextual knowledge is fundamental for the following step of selecting an appropriate research strategy for conducting the research.

The exploratory nature of the study’s research questions necessitates a qualitative research strategy where concepts and theories are allowed to emerge from the data. The study utilizes a comparative cross-sectional design where documents of different countries pertaining to the same time period are examined (Bryman, 2012). This comparison helps validate the findings, and allows for the areas of convergence and divergence to be identified. Purposive sampling is used to identify the sample of Arab countries whose documents are to be used in the study, then their educational plans are reviewed for data collection.

As the study works with written texts, a thematic document analysis is employed as the research method, where the text is reviewed for evidence of the themes identified as ‘globally influenced’ in accordance with the literature review and the data collected. The data is analyzed using a thematic matrix instrument where vertical and horizontal analyses provide the basis for the research findings. The study then critically uses insights from both the World Society theory (Meyer et al, 1997) and the GSAE (Dale, 1999) to interpret the findings.
Selected elements of each theory are combined to form the lens needed to conceptualize and reflect on the findings of the study and by that answer the research questions.

1.4 Structure of the Thesis

This thesis has started by introducing the topic and rationale of the research, stating its purpose and questions, and outlining the plan to carry it out. The following chapter contextualizes the study by framing globalization and its influences on education in terms of its conceptualization, process and actors and briefly outlaying selective literature or available knowledge pertaining to the research topic. Building on the contextualization of the study and the literature review, the methodology that is used to conduct the research and the study’s limitations are discussed in chapter three. Chapter four defines the main themes and concepts that guide the inquiry and introduces the analytical framework by which the research findings are synthesized and interpreted. Background information on the socio-economic and political contexts of the Arab world in general and the sampled countries and their documents in specific is illustrated in chapter five. Next, the empirical findings of the study and answers to the research questions are portrayed in chapter six, categorized thematically and evidenced by excerpts of the texts in the documents examined. Chapter seven offers a discussion of these findings in light of the literature review and analytical framework. Finally, chapter eight sums up the study with a conclusion reflecting on the main findings of the research and recommending topics for further research.
2 Global Influences Contextualized

Studying global influences on educational plans in the Arab world can be a huge and confusing task unless an appropriate contextualization of the topic is undertaken. The countless interpretations and understandings associated with globalization and its influences make it mandatory to contextualize and pinpoint the exact areas and conceptualizations under consideration, before delving any deeper into the study.

The purpose of this chapter is to clarify, within the wide scope of the topic, the contours of what is being investigated in this study and resolve any ambiguities around its main themes. This is an important prerequisite in guiding the search for relevant literature and informing the data collection and analysis of the study’s findings. In addition, it sets the stage for what the study will encompass.

This chapter is organized in five parts: the first makes an account of how the famous yet poorly defined term globalization is interpreted in the study; the second presents an explanation of what is meant by global influences and how they can be identified; the third discusses how global influences occur; the fourth outlines the workings of the key actors of global influence and the fifth gives an overview of a selection of empirical research that has addressed the topic of global influences on education.

2.1 Global Influences - The Concept

Despite the immense literature on globalization and the numerous attempts to define it, the term remains loosely defined which gives room for a wide range of interpretations. Nevertheless, it seems that there exists a consensus nowadays that globalization does exist and does have implications on local educational policy, despite the diverse interpretations of its nature and impact (Carnoy, 1999; Steiner-Khamsi, 2004; Dale 1999). Several scholars, however, oppose the idea that it can be used as a justification for all phenomena or orientations of local policies (Dale, 2000; Tikly, 2001). It is essential at this point to try to illustrate, in a very simple and concise manner, a general overview of how globalization is generally interpreted and the different responses to this interpretation, rather than attempt to create or use a precise definition.
Globalization simply refers to the idea of the world being interconnected to the extent that it can be viewed as ‘a small village’. Carnoy (1999) explains that according to this understanding of globalization, the concept of the nation state being the basic unit of the world with full, independent control over its defined territories and issues, is no longer possible. The flow of products, people, knowledge and ideas is no longer restricted by national borders, hence creating a new way of looking at the world. He describes globalization as “a new way of thinking about economic and social space and time” (1999, p. 19) and a ‘reconceptualization’ of the world. According to this conception, non-national forces and institutions impact how the world progresses, and nation states, regardless of how they conceive this impact, have little to do about it. Nation states are expected to play a regulatory, informational and equalizing role for the purpose of economic growth rather than administering the system from the top and protecting national projects (p. 20, 22).

He continues to assert that globalization is largely attributed to the emergence of transnational, multilayered organizations after the end of the Cold War, the triumph of the capitalist model as an ideology and the technological revolution that has fueled the interconnectedness of the world and the sharing of knowledge (p. 17). New political and economic arrangements, are forcing nation states to reorganize their priorities based on influences external to their boundaries in order to secure survival, competitiveness and continued prosperity in this new global order. Though globalization has economic, political and cultural strands, the economic strand is prioritized (Dale, 1999), strengthening the dominance of the capitalist model.

On the contrary to this view, others have serious doubts that this stateless world is in effect even possible. Singh refutes the idea that globalization is a “pre-determined force that pushes and molds local contexts into uniform shapes” (2004, p. 103) and argues that it is a phenomenon and a process that is fostered and actively implemented. Steiner-Khamsi expresses a similar view and describes globalization as an epidemic that has grown in the last decades and argues that globalization is not a new phenomenon but rather a continuation of transnational borrowing (importing) and lending (exporting) of ideas and thoughts that have always been in effect. In addition, she asserts that fear of the internationalization of education and convergence into one highly demanded or effective model is simply erroneous (2004, p. 3).
Kellner similarly discusses responses to globalization, however from a more holistic perspective. He distinguishes between defenders and critics of globalization and explains that the defenders view it as “generating fresh economic opportunities, political democratization, cultural diversity, and the opening to an exciting new world”, while the critics view it as “bringing about increased domination and control by the wealthier overdeveloped nations over the poor underdeveloped countries” (2002, p. 286) and argues that global forces are in a constant dialectic with local contexts with the latter having the ability to contest, reconfigure and transform the former, creating individual frameworks and relationships.

Within the context of this study, it seems plausible to consider the latter view of globalization. The study of global influences on educational plans presented here does not regard global forces as the sole determinant of educational reform planning, however acknowledges the agency of national actors while asserting the existence of global considerations and pressures. As Dale puts it “while globalization has certainly not made nation states either irrelevant or obsolete, it has affected both the content and form of at least some of the policy making procedures and outcomes of all states- which is one of its defining characteristics” (1999, p. 48).

2.2 Global Influences - The Constituents

An important question to pose at this point is: what constitutes global influence? How can a certain educational policy be identified as a globally influenced one rather than a nationally developed one? The great commonalities that exist in educational plans worldwide and the recent trends in educational planning, increase the chances of external hegemonic influences being the steering wheel directing national educational policies. However, it is difficult in today’s interconnected world to trace such a distinction and any effort to identify concrete parameters of global influence will be problematic. With this limitation well acknowledged, the following paragraphs discuss how some scholars have tried to interpret constituents of global influences on education.

Popkewitz argues that a basic feature of globalization is ‘externalization’, which he defines as the “use of foreign or global policies to justify and legitimize what is being done locally” (2004, p. x). According to this argument, references to the external world are used to direct what, how and why certain educational reform choices should be made. Externalization can
be attributed to values, organizations, or to the principles and results of science (Luhmann and Schorr 2000 cited in Waldow, 2012). It can also be attributed to ‘world situations’ implying other countries and the *international* (Schriewer 1990 cited in Waldow, 2012). This constitutes an explicit form of global influence as the referencing of foreign or global policies asserts the existence of interdependency across nation states.

Carnoy (1999) similarly asserts that globalization has had and will continue to have a major influence on education, whether directly or through ideological changes closely related to globalization. He identifies five major ways in which globalization is influencing education. First, the demand on flexible, highly skilled labor is resulting in increased demand for higher levels of education, causing expansion in higher education. Second, the global economy is biased toward the private sector which forms an ideological pressure on governments to reduce public spending on education. Third, international comparisons of educational quality, are increasingly being adopted. This is giving rise to a culture of measurement and testing of knowledge production with a focus on mathematics, science, communication and English as a foreign language. Standards, performance assessment of education workers and accountability are related by-products of this culture. Fourth, the incorporation of information technology in education to improve its quality or reduce its cost is linking students to the rest of the world. Finally, the fear of marginalization due to the transformation of world culture is causing some groups to assert their cultural values more than ever before. The way educational systems conceptualize these global pressures in relation to their status quo determines the kinds of educational reforms they will introduce in response.

Steiner-Khamsi points to other dimensions that researchers have often attributed to internationalization of educational reform, namely privatization, decentralization, choice and standards in education (2004, p. 1). These dimensions are not additional to Carnoy’s, but serve to detail the capitalist ideology that he asserts globalization is promoting.

Another important constituent of global influence is the diffusion of certain global values, themes and concepts. These values and themes evolve, diffuse across the globe and prevail in education reform discourse. Jakobi describes international organizations as being ‘central nodes’ for policy diffusion and enablers of policy transfer through developing and promoting global values and concepts in addition to identifying ‘best practices’ (2012a, p. 391).
Examples of such values include life-long learning, education for the knowledge economy and the focus on skills education.

Based on this brief review, constituents of global influence can be organized into the three broad categories: (1) the externalization effect, (2) neoliberal ideologies and (3) global education values and themes. These will further be defined and discussed as the key concepts of the study in chapter four.

2.3 Global Influences - The Process

Samoff argues that international influence has always shaped the organization and focus of education with the direction of influence in modern times being “from European core to southern periphery” (2013, p. 57). He further explains that this influence has been institutionalized through international organizations that use a number of pathways for its diffusion, with financial aid being the most direct in his opinion. International conferences are a second pathway gaining increasing importance in “transmitting and implanting fundamental ideas about education, and shaping how education is understood, organized and managed” (p. 68). A third pathway is the globalization of standards through the use of assessments that measure and compare achievement cross-nationally. Managing knowledge through its generation, storage and dissemination has similarly become a pathway for international influence. The fifth and most subtle pathway, however, is the way these institutions shape conceptions and analytical frameworks that become taken for granted and rarely critiqued. Samoff also discusses how institutionalized soft power interferes with research, the main generator of knowledge, through funding certain studies and not others, hence shaping scholars’ understandings and conceptions (p. 80).

In a similar attempt to track how international influences are disseminated, Ball identifies two main criteria: “the flow of ideas through social and political networks” and the establishment of these influences as “the new orthodoxy” (1998, p. 124). He explains that the flow of ideas can take several pathways such as policy borrowing, the movement of graduates, the movement of charismatic academics and their publications, the activity of entrepreneurs who sell their solutions to academic issues and through sponsorship and imposition of specific policy solutions by multilateral agencies.
Jakobi (2012a), on the other hand, identifies five instruments by which international organizations facilitate policy transfer in specific directions. These are (1) dissemination of ideas through forums, (2) standards setting through conventions and league tables, (3) policy coordination and the sharing of expertise in policy forums and policy networks, (4) financial incentives through sponsoring programs and practices and (5) provision of technical assistance in different areas of educational reform.

Of high relevance to this contextualization, however, is the acknowledgement of the different placements of the ‘developed’ and ‘low income’ states in this discussion. Though globalization plays out differently for each and every context, this distinction remains necessary. Steiner-Khamsi (2004) asserts that low income countries are subjected to externally induced pressures to reform in certain ways as in the form of international agreements for instance. This assertion, in fact, problematizes her own idea that globalization is a continuation of traditional borrowing and lending, at least for low income contexts. This is because borrowing and lending have been characterized, for the most, to be voluntary decisions; and where pressure is exercised, considerations other than ‘learning from others’ prevail. She does, however, acknowledge this and states that even if the international community of educational experts is imagined, their impact and pressure is real (2004, p. 4).

Accordingly, the role of political-economy and power relations cannot be overlooked when studying globalization in a context that is not considered part of the developed world. This resonates with what Dale (1999) describes as the mechanisms of globalization. He argues that the mechanism by which globalization operates in different contexts is key in specifying how it affects national policy. This is because the ways nation states interpret and respond to the set of rules represented by globalization is very distinct.

### 2.4 Global Influences - The Actors

Supranational organizations have been recognized as key actors in globalization of education by acting as lending agents for educational reform, especially in low income countries. These organizations have facilitated, administered, disseminated, funded and even initiated transnational borrowing and lending in education (Steiner Khamsi, 2004, p. 169). Verger asserts that international financial organizations have agenda setting capacities where they “define what the main problems are that member-states should address if they want to successfully integrate into an increasingly globalized and competitive knowledge-economy”
Not only have these organizations shaped national policies of education, but they have also been sought for assistance regarding construction of strategies for educational reform. Accordingly, their governance encompasses coordination of policies and programs, development of legal requirements, provision of financial support and formation of opinion (Rizvi & Lingard, 2006).

Jones & Coleman similarly assert that UN agencies have played a major role in promoting the advancement of education since the start of the Cold War and are continuously sought for solutions to local problems with UNESCO, World Bank, UNICEF and UNDP being the most committed to education (2005, p. 1). Naturally, this agency involves views of how education should be reformed and what constitutes best practice according to each organization’s particular approach. The World Bank, UN organizations and NGOs such as Save The Children are among the most powerful and influential in shaping key ideas and policies about education. However, each of them exercises its influence in an interestingly different way as they sometimes hold “contrasting values and stances on education” (Jones & Coleman, 2005, p. 2). The following paragraphs highlight some of the most influential workings of these organizations in the field of education.

Education was declared by the UN as a human right in 1948, after which UNESCO worked to promote “universalization and institutionalization of formal and non-formal systems of education” (Jones & Coleman, 2005, p. 26) for purposes of modernization and development. Since this declaration, transforming the principle of universal primary education into national goals and development plans has become an imperative for all governments regardless of their economic, cultural or historical standings (Chabbott, 2003). This stance of universal schooling and universal literacy (later named Education for All) as a human rights concern, has been and still is held by UNESCO, while the other UN bodies use economic justifications for education. UNESCO, with its human rights perspective, emphasizes universalization of basic education and eradication of illiteracy through programs directed to children and adults with the legal human rights instrument legitimizing its work.

The World Bank, on the other hand, is the “largest lender in the education sector” (Steiner Khamsi, 2004, p. 169). Its core business as a bank is to provide governments with repayable loans to finance education. Nevertheless, “Bank education loans are bound up with the Bank’s ideas about education and how education can relate to development and to poverty
reduction” (Jones, 2004, p. 188). The loans provided by the Bank are linked to adoption of certain policies as a condition for receiving the loans. This provides a clear explanation of how its influence works. The Bank, in addition, seeks to be “the lead agency in the world of ideas about educational policy” (Jones, 2004, p. 189) and legitimizes its preferred policies and ideologies by supporting them with empirical research and knowledge. Acting as a ‘Knowledge Bank’ is a more powerful and far-reaching tool in exercising influence on educational policy worldwide. According to Jones & Coleman, the World Bank champions economic globalization, which attempts to consolidate the world’s economies into a single economy functioning on economic principles, summed up in the term neo-liberalism (2005, p. 17). Education, in this context, serves to create human capital or manpower that will work to fuel economic growth and development. Accordingly, the Bank focuses on technical training and vocational and technological components of higher education, as these, in neo-liberal terms, would yield higher economic returns.

The four UN bodies, UNESCO, World Bank, UNICEF and UNDP, along with other bodies unprecedentedly co-sponsored a World Conference on EFA in Jomtein in 1990 to set targets for EFA by the year 2000 and elicit support for them from international donor community and governments of developing countries (Jones & Coleman, 2005). The World Declaration on Education for All, according to Chabbott (2003), asserted the right of every human being to a quality basic education and delegates of governments, intergovernmental and non-governmental organizations agreed to adapt this framework to a national plan of action and ensure all citizens receive this right. She further argues that WCEFA is a product of the global environment, far from being “national governments taking rational, measured steps to address specific needs and unique interests” (2003, p. 2).

By the year 2000, there was a need to further push the targets to 2015 and EFA remained on the millennium global agenda. The EFA targets, expressed in six goals, were reaffirmed in the World Education Forum held in Dakar, Senegal, in the year 2000. These goals concerned 1) Early childhood care and education, 2) Universal primary education, 3) Youth and adult skills, 4) Adult literacy, 5) Gender equality and 6) Quality of education. These goals required all countries, especially developing ones, “to implement policies resulting in basic educational standards……emphasis is on access to primary education with eradication of gender differences and those based on class and ethnic status” (Goldstein, 2004, p. 7).
The goal of UPE managed to stay on the UN global development agendas to date, passing through the MDGs (2000-2015) and the SDGs (2015-2030). The eight MDGs impacted education by having 1) the achievement of universal primary education as the second goal and 2) the promotion of gender equality and empowerment of women as the third. The 17 SDGs, which fostered the concept of sustainable development, included quality education as the fourth goal and gender equality as the fifth. The fourth goal details “ensure inclusive and quality education for all and promote lifelong learning” (UN, n.d.a).

Another body that is having increasing influence on national education policy nowadays is the OECD. Its ‘statistical compilations’ are used by governments to benchmark and evaluate policy options and performance levels. Its recommendations for educational reform constitute an important resource that national governments use to legitimate, design and implement reform initiatives. The influence of the OECD is quite interesting per se as the organization neither has legally binding mandates nor uses financial resources to enforce policy adoption (Rizvi & Lingard, 2006). One can expect however, that its influence stems from the fact that its member states are the ‘developed bloc’ and hence conforming is essential for its member states due to peer pressure. As for non-member states, OECD members are a role model and resemble the path for development.

The OECD has asserted that education is a priority and the most important investment. This view regards education as a tool to prepare individuals, who represent the human resource or human capital, to participate in economic growth. It has promoted the view that education should be linked to the requirements of a global knowledge economy, bringing along with this view several ideas such as “privatized administration of education, outcome measures and knowledge as a commodity” (Rizvi & Lingard, 2006, p. 248). This, to a great extent, resonates with the neo-liberal reform practices discussed earlier. However, the OECD uses data and statistics to promote this view rather than rhetoric and oral debates of ideology. Numerous studies and programs analyzing the relationship between different educational components and economic development are conducted by the OECD. These statistical compilations of internationally comparable indicators, or in other words knowledge, are the main tool that OECD uses to become “an international mediator of knowledge and global policy actor” (Rizvi & Lingard, 2006, p. 257) and gain increasing influence on educational policy and practice.


2.5 Global Influences - The Empirical Research

Given that globalization has become an *epidemic* (Steiner-Khamsi, 2004), it is no surprise that studies on global influences on education are countless, covering a variety of topics, methodologies and conceptual frameworks, and that an exhaustive review of them is way beyond the limits of this thesis. Therefore, the literature review in this section is limited to that necessary for setting the stage for the study and guiding the inquiry. Selective extant studies are investigated to inform and direct the research. In this section, an identification of what constitutes relevant literature is given, followed by a review of selected empirical studies on global education concepts and themes and finally, a discussion of the implications that this review has on this study.

2.5.1 Identifying ‘Relevant’ Literature

Tikly argues that theories and frameworks that have been developed to conceptualize the workings of globalization on education have assumed that only one experience of globalization exists, namely that of the developed world (2001, p. 151). He further asserts that “a shortcoming of much of the existing literature on globalization and education has been that the specific contexts to which the theory is assumed to be applicable have not been specified” (2001, p. 152) and that such conceptualizations are unable to explain the relationship between globalization and education in less developed and low-income countries. In agreement with this view, a focus on the literature on globalization of education in the developing world or the ‘periphery’ will be adopted. The developing world is subject to different kinds of pressures to reform education in certain ways (Steiner-Khamsi, 2004, Ball & Youdell, 2008) and hence demonstrates a unique model. Moreover, the developing world is highly dependent on foreign expertise and financial and technical assistance, leading to the extensive presence of external organizations, with their capacity in enhancing global influence through setting agendas and priorities (Verger et al., 2012, p. 5).

Studying global influences has several dimensions: policies, process, implementation or impact (Steiner-Khamsi, 2004). This study is more linked to the policy dimension. Policy of course, is as contested a term as globalization and has diverse definitions and conceptualizations per se, however it is used here to reflect its simple dictionary meaning of being ‘a proposed action’ (Dictionary.com). The education plans investigated in this study
can be considered proposed actions of the government. Therefore, studies relating to the selection and adoption of global education policies are within the domain of the literature relevant to this study.

Most studies on globalization of education in the Middle East and North Africa region have investigated the convergence of higher education into more global or international models and the expanding phenomenon of western campuses operating in the region (Mir, 2012; Sabbour, 1999; Jaramillo, Ruby, Henard & Zaaferana, 2011; Miller-Idriss & Hanauer, 2011; Herrera, 2007). This can be attributed to the direct relationship between globalization and the new requirements it has created for the labor market on the one hand and the capacity of higher education institutions to provide those requirements on the other. Less common, however, are studies pertaining to basic education, apart from those studies related to measuring performance in achieving EFA targets. This represents a gap in the literature and legitimizes studying the non-tertiary stage of education. Therefore, studies related to governance of this stage of education are considered relevant to this study.

2.5.2 Selective Studies on Global Influences on Education

Verger et al. argue that similar education reform policies and programs are implemented everywhere to the extent that they have acquired the status of what they call ‘global education policy’ (2012, p. 3). They assert that research on such policy does not provide much empirical evidence on the interplay between globalization and education and how and why policies are globally constructed, but rather focus on how such policies travel across and within countries. Their compilation of case studies to address this concern reveals that globalization has “drastically altered the education policy landscape across the world and more particularly, in the context of developing countries” (p. 4).

One line of research studying global policies in developing countries is concerned with how institutionalized global policies like EFA and MDGs and their related targets are interpreted, implemented and what their long-term impact on education is. These institutionalized policies have triggered several studies on education in developing countries, not only to report on their status, but also to measure their impact and relevance to local contexts. Unterhalter (2012) investigated how gender inequality, being a key concern in EFA and MDGs, was understood, negotiated and practiced in the local settings of South Africa and Kenya. The project was of a comparative case study design and used documentary analysis of government websites,
interviews and focus group discussions to collect data. Findings revealed that there was a general consensus of the policy, but not of its ownership. Moving to meso and micro levels, the policies were regarded as ‘other people’s projects’ with their wider benefits not clearly conceived. This asserts that a process of selection exists at the local level when adoption of global policies takes place. In another study, Samoff (2013) studied the process and impact of the institutionalization of international influence on education through tracing the impact of foreign aid to EFA in African states. He argued that dependence on foreign aid for education worked against the sustainability of education in these countries and has many subtle forms of influence on its recipients. These two studies reflect the conflicting pressures that act on the internalization of global influences. While aid and other institutionalized policies enforce their associated terms, local practices act to select and manipulate what has been enforced.

Another line of research is concerned with the dominant neoliberal ideology fostered by globalization and its related policies of privatization and decentralization. In his study of the appropriateness of neoliberal conceptual frameworks on studying globalization and education in the post-colonial world of sub Sharan Africa, Tikly asserts that the global age advocates global capitalism, creating “new forms of global culture, governance, and of civil society” (2001, p. 153). He argues that this approach is implausible in the context of post-colonial, low income countries for two reasons. First, because education has been and will continue to be an important tool for forging national unity and common citizenship for postcolonial governments and that they will continue to maintain a strong grip on. Second, because financial resources in these countries do not allow for high access to technologies and computers, except for the elite minority. Tikly’s argument, as a matter of fact, is quite relevant to this study as similar notions of national unity and identity are common purposes of education systems within the Arab World. Faour & Muasher (2011) have stated that an interesting part of Arab education is the notion that “allegiance to one’s country means pledging loyalty to the ruling political party, system or leader, and that diversity, critical thinking, and individual differences are treacherous” (cited in Waghid & Davids, 2013, p. 345-346).

A study of education in Latin America in the second decade of the twenty first century, investigated the impact of local policy shifts that aimed to counteract the impact of neoliberal ideologies adopted three decades earlier as part of the structural adjustments imposed by the World Bank and IMF (Arnove et al., 2013b). Neoliberal ideologies that had been adopted
earlier had widened the gap between rich and poor, decreased state funds to education and created inequitable education systems (p. 315). The study examined enrollment and completion patterns of different groups and the various redistributive policies and reform initiatives introduced. Findings revealed that the active role of grassroots organizations and civil society to complement state efforts is essential in reaching more equitable and democratic education systems. This study draws attention to the importance of situating the role of civil society in the documents under study.

Silova and Eklof (2013) studied the post-socialist transformations to education in Eastern and Central Europe in the context of globalization. Their purpose was to make a case for possibilities other than the western capitalist model to replace socialism and by that refute the world culture theory asserting the United States as the setter of global standards of education (p. 379). They argued that the recurrent rhetoric on global convergence in education has blocked the opportunities for thinking of new and novel models. Their study encompassed privatization and decentralization as constituents of global reform and their different interpretations in the region. Findings of the study revealed that decentralization has been widely adopted in policy rhetoric but only minor cautious steps were implemented in practice. Privatization, on the other hand, has initiated private tuition which has had its good and bad sides. The study demonstrated that only the rhetoric of Western reform agenda is converging and is continuously ‘defied and redefined’ at the local level. The study concluded with the assertion that a different lens has to be used when studying global discourses and practices as these are transformed into new and unexpected arrangements with uncertain impacts (p. 380).

While the above studies have situated global policies as being representative of Western or US hegemony and adopted an anti-neoliberal stance, other studies have had a more positive orientation. Jakobi (2012b), for example, studied the implementation of global policies in two African countries through investigating their alignment to the global discourse on life-long learning. The study was based on World Society theory and viewed world politics as based on a common world culture where successful states act as role models for others. The study asserted the countries’ efforts to engage in the global discourse but recognized that the implementation differs widely and is highly related to the political, social and economic conditions of the country.
In another study of the neoliberal strategy of decentralization, Elbaradie (2015) studied 22 reports on decentralization in different parts of the world and their impact on education as part of her study questioning the use of decentralization as a tool for improving basic education in Egypt. This study was pursuant to Egypt ranking last in the Quality of Primary Education Index in the Global Competitiveness Report 2013/2014. She used thematic analysis and concluded that the benefits of decentralization in basic education outweigh its costs and made recommendations for tasks that could move from the central level to the meso and micro levels in Egypt. Though this study has used experiences from around the globe to evaluate the use of decentralization, it has established decentralization as a strategy of governance and has not linked it to any global agendas; that is to say, it has used a world culture orientation rather than a GSAE.

2.5.3 Implications for this Study

This brief overview of selected studies investigating global influences on education policy in some developing countries has several implications for this research. The above empirical studies have all emphasized the agency of local contexts in how global influences are understood, adopted, transformed and implemented. This reconfirms the significance of researching global influences in contexts where limited literature exists. Studying processes, practices and outcomes is certainly of high importance, but it seems equally important to research the selection of themes in specific contexts and the possible justifications for such selection. Even when constraints on access and resources limit the ability to research implementation of these policies, an exploration of the rhetoric within the Arab countries is still useful.

Moreover, the dichotomy of rhetoric and practice of global policies that some of the studies have reflected, has implications for the limitations of this study and draws attention to the fact that the documents analyzed may be mirrored differently in practice.

A final implication is the use of World Society and GSAE as the main conceptual frameworks for interpreting global influences on education. Where a positive orientation to these influences exists, world society theory is inherent, interpreting global influences as models of good practice. However, where a Western hegemony, political economy orientation exists, a global agenda is at the core. For this reason, both theories will be explored in detail in chapter four and a new conceptualization for interpreting global influences will be formed.
Chapter Summary

This chapter has contextualized the main theme of the study: global influences on education. It has first identified that globalization, as interpreted in this study, has certainly increased the interconnectedness of the world and created general trends in education but has not limited nation states’ ability to control their internal affairs and adapt external pressures to local contexts, where the latter are seldom passive recipients. Local contexts respond in so many different ways that assert their power and agency. Global influences have been framed as encompassing the concepts of externalization, neoliberal ideologies and global educational themes which will be further elaborated on in chapter four.

Global influences are transferred mainly through the works of supranational organizations such the World Bank, the UN and its bodies, and the OECD. These key actors produce knowledge; provide financial aid; hold conferences; initiate binding global conventions and agreements; create assessments and standards; and shape conceptions of education. Through these mechanisms, they foster and enhance global influence worldwide.

In addition, the chapter has framed the literature relevant to this study to be literature pertaining to the context of developing countries, the policy dimension and the non-tertiary stage of education. Selected studies were reviewed for insights on concepts, frameworks and limitations. This review signaled the significance of local contexts’ selection, interpretation and re-contextualization of globally induced policies. Moreover, World Society and GSAE have been highlighted as common theories used in the analysis of global influences on education. Using the contextualization provided in this chapter, the methodology and analytical perspective are identified and discussed in the following chapters.
3 Methodology

This chapter discusses the methodology used to conduct the study and answer the posed research questions. The study’s methodology is informed by the research questions and literature review of the topic. The chapter starts by identifying the research strategy and design employed, and clarifying their relevance to the research purpose and questions. This is followed by an outline of the rationale and process of sampling the four countries and their corresponding documents along with an overview of the data collection and data analysis procedures. Finally, a discussion of the reliability, validity, ethical considerations and limitations of the study is outlaid.

3.1 Research Strategy

This study explores global influences that are evident in the educational plans of four countries in the Arab World and interprets the factors that could impact such influences. Since little is known about this topic in the Arab world, the study will be of an exploratory nature, aiming to “develop propositions for further inquiry” (Yin, 2009, p. 9) and staying open to the emergence of themes and concepts from the data and not limited or confined by existing theories or pre-assumptions.

The study can well be situated within the interpretivist paradigm, where the social world is “an emergent social process, which is created by the individuals concerned” (Burell & Morgan, 1992, p. 28). The subjectivity associated with almost all the core concepts of this study rationalizes this standpoint allowing for multiple constructions of meaning for them. The subjective meaning that each concept holds and its consequent interpretation is highly dependent on its context, which advocates the idea that meaning and reality are subjective. In addition, the interpretivist paradigm aims to study the world as it is and reach an understanding of the status quo (Burell & Morgan, 1992) and this is the stance that this study takes. An in-depth understanding of global influences on educational plans and an interpretation of the evident convergence and divergence models aims solely to reach an understanding and regulation of reality rather than introduce radical change (Burell & Morgan, 1992).
Another fundamental stance of this study is its constructivist orientation where “social phenomena and categories are not only produced through social interaction but are in a constant state of revision” (Bryman, 2012, p. 33). The significance of this stance is again related to the blurred definitions associated with the concepts used in this study. The multiple possible constructions of meaning for the core concepts of the study have to be acknowledged both in the texts of the documents and in the process of their interpretation and analysis.

The exploratory, interpretive nature of this research and the ‘what, how and why’ explanatory questions posed (Yin, 2009) entail the use of a qualitative research strategy. Qualitative research allows themes and concepts to evolve from the deep rich interpretations that are not bound by pre-determined criteria (Bryman, 2012). The focus that qualitative research has on words, meanings and inferences makes it appropriate to the study’s purpose of analyzing global influences evident within a sample of textual documents.

### 3.2 Research Design

Research design is “the logic that links the data to be collected (and the conclusions to be drawn) to the initial questions of study” (Yin, 2009, p. 24). This study questions the ‘what, how and why’ of global influences on educational plans and hence will be of a comparative cross-sectional design where several documents from different countries relating to approximately the same period are analyzed using the same method to detect patterns of association (Bryman, 2012, p. 59).

The comparative design is employed in this research to reach a better understanding of the social phenomenon under study through investigating more than one case using the same method (Bryman, 2012, p. 72). Moreover, such comparison enhances the trustworthiness of the findings due to the use of multiple sources of data. Another advantage is the ability of a comparative design to deploy the similarities and differences that emerge from the study in theory building and making theoretical reflections (Bryman, 2012, p. 75). As this study questions the loose concept of global influences and the related convergence and divergence areas in the sampled documents, this design is helpful in identifying prevailing trends at a certain period of time and their different interpretations and how contextual differences may impact them.
Since the data of the study is derived from written texts, the method of investigation will be a qualitative document analysis that “seeks to identify the particular themes and dimensions of meaning that run through documents and structure the presentation of information” (Scott, 2006, p. xxiii). A document, in this sense, refers to textual material that has not been prepared for the purpose of the research and can act as a source of data that may be read and analyzed (Bryman, 2012, p. 543). Thematic text analysis is the method used to analyze the data and answer the research questions in this study where themes are used to categorize and classify the data to allow for analysis and interpretation (Kuckartz, 2014).

### 3.3 Sampling

This study uses purposive sampling to identify the countries whose educational plans are to be analyzed. Purposive sampling is “the selection of units with direct reference to the research questions being asked” (Bryman, 2012, p. 416). The research goals are the focus of the sampling process and accordingly only documents that can answer the research questions can be considered for sampling.

The first step in the sampling process was to select the countries whose documents will be sampled. They needed to fulfill the criteria of being reflective of the diversity of the Arab world (to a certain degree) and at the same time having official plans that can answer the research questions. Therefore, an initial screening of all countries of the Arab League was done and a search of their educational plans (if any) was made. The official government websites for each of the 22 countries were used to identify whether educational plans are officially available to the public. This search involved using several keywords as the names used by different countries for the ministries and plans are quite diverse. These keywords included the English and Arabic versions of education plan, education strategy, education development plan, development vision, strategic vision, education reform plan in addition to Ministry of Education, Ministry of Planning, Ministry of Higher Education and Research.

The results of the search were inputted in a table that included name of country, name of education plan, its duration, language and electronic link in addition to the name and link of any nation-wide (parent) plan that has been used as a source for the educational plan. These results can be found in appendix (1).
Selecting the sample came in two stages. First, three groups of countries were excluded: 1) countries that are in current conflict (Syria, Libya, Iraq, Yemen, Palestine) 2) countries whose plans are still in process or not existing as independent education plans (Saudi Arabia, Kuwait, Algeria) and 3) countries whose plans were in a language other than English or Arabic (Comoros, Djibouti, Mauritania).

Second, a choice had to be made between the 11 remaining countries that had plans that were developed enough to answer the research questions. In addition, they needed to be somewhat representative of others, based on the literature review on the Arab World and commonalities that exist within it. This has led to the choice of the educational plans of Egypt, Jordan, Qatar and Tunisia as samples for this document analysis. It is believed that this sample covers, to an extent, the geographic, economic and demographic diversity in the Arab region. In addition to using educational plans as sources of data for the study, relevant pages concerned with education in the wider national plans for the same countries are also used for the analysis to get a better understanding of the influences and forces acting on the plans and enhance the validity of the findings. The names and specs of the selected sample documents are in the table below.

<table>
<thead>
<tr>
<th>Country</th>
<th>Type of Plan</th>
<th>Name</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Egypt</td>
<td>Educational Plan</td>
<td>Strategic Plan for Pre-University Education – SPPE.</td>
<td>2014-2030</td>
</tr>
<tr>
<td>Jordan</td>
<td>Educational Plan</td>
<td>National HRD Strategy – NHRDS</td>
<td>2016-2025</td>
</tr>
<tr>
<td></td>
<td>National Plan</td>
<td>Jordan 2025 Vision</td>
<td>2015-2025</td>
</tr>
<tr>
<td>Qatar</td>
<td>Educational Plan</td>
<td>Education and Training Sector Strategy – ETSS</td>
<td>2011-2016</td>
</tr>
<tr>
<td>Tunisia</td>
<td>Educational Plan</td>
<td>Education Sector Strategic Plan – ESSP</td>
<td>2016-2020</td>
</tr>
<tr>
<td></td>
<td>Education Reform Project in Tunisia– The White Book – ERP</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>National Plan</td>
<td>Development Strategy – DS</td>
<td>2016-2020</td>
</tr>
</tbody>
</table>
3.4 Data Analysis

Data is interpreted in this study through qualitative thematic text analysis of the sampled documents which is “a searching out of underlying themes in the materials being analysed” (Bryman, 2012, p. 557). First, the documents were reviewed for data pertaining to their context. Information regarding the time and duration of their preparation, the participating bodies/individuals, their intended purposes and sources of funding were searched whenever available. Second, content analysis based on themes and subthemes that relate to global influences was made. The principal unit of analysis in this study is the sentence level and where complete sentences are not used, the phrase level. Existing English versions of the plans were used for three of the four countries and for the fourth one (Tunisia), where only an Arabic version existed, translation was carried out by the researcher.

Identification of Themes and Sub-themes

Though the literature review provided a starting point for identification of initial thematic categories of global influence, the analysis was not immune to the emergence of new ones and their continuous revision and refinement. As in most qualitative research, theories and concepts are allowed to emerge from data (Bryman, 2012). A thematic matrix (Kuckartz, 2014) was developed as an instrument to organize the data with the sampled documents as column headings and the themes and sub-themes as horizontal ones. Themes and sub-themes were altered, merged, added or omitted during the whole process of data analysis as each document was quite unique in its focal themes.

Identification of themes and sub-themes took several stages. Initial work with the data started with five main categories informed by the literature review: Multilateral organizations, global comparisons & educational measurement, neoliberal ideologies (privatization – decentralization – accountability), global themes (life-long learning, ICT integration) and assertion of local identity. New sub-themes such as the knowledge economy, international agreements and use of standards emerged as work with the data proceeded. These were used to articulate both the literature review and the categorization scheme of the data. The final set, which was the result of the dialectic of the literature and the data in the documents, had the following categorization:
Table 3.2 Categories and Sub categories of thematic text analysis

<table>
<thead>
<tr>
<th>Category / Theme</th>
<th>Sub-category</th>
<th>Sub sub-category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Externalization</td>
<td>International agreements</td>
<td></td>
</tr>
</tbody>
</table>
|                  | Multilateral organizations / Aid agencies | As providers of knowledge  
As providers of material / technical support |
|                  | Regional / cross-country references | For benchmarking purposes  
For policy learning / financial cooperation purposes |
|                  | World-wide comparisons | Using Indices  
Using ILSAs  
General comparison (criteria undefined) |
| Neo-liberal Ideologies | Education for human resource development |  |
|                  | Privatization |  |
|                  | Decentralization |  |
|                  | Performance management systems (use of standards – measurement of outcomes – accountability) |  |
| Global Themes    | Knowledge Economy |  |
|                  | Life-long learning |  |
|                  | Skills focused education |  |
| Emphasis on national / cultural identity | |  |

**Allocating Data to Themes and Sub-themes**

Each document in the sample was read thoroughly and where units of analysis (sentences) were evaluated to relate to one of the themes or sub-themes, excerpts of the documents (text) were copied and placed in the corresponding cell in the matrix. To maximize consistency in this allocation, a scheme for categorization defining – to the maximum possible extent - the characteristics of units that relate to each category, was made. A key-word approach was also used for some categories that seemed to overlap with texts; that is to say a text containing keywords of life-long learning or knowledge economy, for instance, was directly inserted in the corresponding category. In other cases, the text did not directly correspond to a keyword or included several keywords in an intertwined manner as was particularly the case with items
relating to performance management and accountability. In such cases, a judgement based on general meaning was made. The categorization scheme and keywords list can be found in appendix (2).

**Data Interpretation and Analysis**

Data in the thematic matrix were interpreted both horizontally and vertically. Vertical analysis (with one document as the column heading) showed the themes that appeared in the document and their recurrence throughout the document. This showed 1) the types of global influences selected by the document’s creators and 2) the significance of each theme according to its recurrence. Horizontal analysis, on the other hand, provided the comparative dimension of the study, where the existence of a specific theme was analyzed across the different documents. Other nonlinear comparisons were made using multiple columns and rows to identify and compare prevalent themes in the different documents and analyze them in relation to document and country contexts.

### 3.5 Reliability, Validity and Ethical Considerations

The purpose of this study is to investigate the ways global influences are, whether explicitly or implicitly, reflected in the educational plans of the sampled countries. This is a very evaluative task and concerns about the reliability and validity of the research results have to be addressed. Reliability and validity have been more associated with quantitative research (Bryman, 2012; Yin, 2009), nevertheless, they can still be adapted to qualitative research, considering their general concerns about the quality of research.

Reliability is “concerned with the question of whether the results of a study are repeatable” (Bryman, 2012, p. 46). The documents used in this study are official documents from state websites. This means that they are of high authenticity. However, subjective interpretation and evaluation of the texts are continuously used to interpret the meanings and inferences as well as categorize the data into themes. This high subjectivity limits the reliability of the analysis. In order to reduce this subjectivity, a keyword approach is used to allocate the data to themes and sub-themes. As much as possible, texts are allocated to themes that literally match key words that can be found in the texts. The themes are also identified and named after the keywords that would commonly be found in the texts. Standardization of language is used to the fullest possible extent as another way to boost reliability. English versions of the
documents are used to avoid translation pitfalls except in the Tunisian documents where only Arabic versions existed and those are translated by the researcher.

Validity, on the other hand, is concerned with the “integrity of the conclusions that are generated from a piece of research” (Bryman, 2012, p. 47). The first challenge to the validity of this study is the identification of what constitutes ‘global influences’, the basic construct or concept in the study. To counteract this challenge, several sources of literature are reviewed and synthesized (see chapter 2) to yield the most inclusive identification of global influences on education. Another challenge is the dependence on a single plan of education from which to draw inferences. In response to this, the study reviews the national ‘parent’ plans for all the sampled countries and other educational plans whenever available (as in the case of Tunisia) to allow for more inclusive and holistic sources of evidence. Moreover, excerpts of the documents are frequently used to verify the findings and interpretations of the study. Another procedure that is taken to support the validity of the study lies in the sampling procedure: the selected countries are diverse with respect to their income levels, size of education systems, social composition and political systems to encompass the diversity within the Arab world.

This study has no significant ethical considerations. The documents used as sources of data are legally obtained as they are published on official government websites. Personal bias is minimized by using a categorization scheme and limiting translation to the Tunisian documents that are only available in the Arabic language. Nevertheless, and as is natural to all research, the personal values and experiences of the researcher who is a citizen of one of the sampled countries can never be totally isolated from the judgements and evaluations made during the study.

### 3.6 Limitations

As in all empirical research, there are several limitations to this study. However, the acknowledgement of these limitations is by no means intended to undermine the value and contribution that this study makes. On the contrary, awareness of these limitations enhances the appropriate use of the study and illustrates where caution has to be taken. Limitations of the study serve to complement it and to acknowledge the researcher’s consciousness of its pitfalls. The following limitations to the study have all been inherent considerations in
designing the methodology of the study and many steps were taken to minimize the impact of these limitations. Nevertheless, it is useful to outline them separately.

The first limitation is that of using documents as sources of data. Documents, even official ones, can and do reflect biases; they cannot be treated as depictions of reality and have to be viewed within the context of their production and their intended audience and purpose as all documents aim at making a particular impression (Bryman, 2012, p. 554). Our understanding of the context and time of the production of the sampled documents in this study is limited to what is included in them and therefore, the interpretation of the meanings they convey is also limited. Another concern is that each document is unique in its layout, structure and vocabulary which makes comparison a difficult task. While some documents, for example, mentioned the organizations / individuals that contributed to their creation, others have not.

The second limitation concerns the fact that these documents are final published versions of a long planning process that little is known about and much could have been learnt if the process was a more publicly documented one. The tendency in the Arab World to not provide much data to the public is a constraint to any research process in the region.

The third limitation lies in the representativeness of these documents in regard to the nature and extent of global influences on educational planning. The one or two documents analyzed per country, though are official enough to reflect educational policies, could be mere documents that have little or nothing to do with real practice. This forms a limitation to understanding the relationship between globalization and educational plans in the Arab World as the value and weight of these documents are unknown. Actions rather than words would better represent the real influence of global forces. It takes much more than a document’s analysis to identify global influence.

The fourth limitation is that the findings in this study are based on interpretations of the documents, which are a subject of personal evaluations and judgements. The meanings of the words and the inferences they give, given the different forms of wording and design used in each document, made the process very subjective. Identifying what constitutes global influences in national plans, which is the analysis process, is similarly subjective, especially when the inference is implicit.
The fifth limitation relates to the fact that the themes and categories used for analysis can never be mutually exclusive. Themes such as the knowledge economy, global competitiveness, international standards, best practice, life-long learning and century skills are highly intertwined and overlapping due to their loose definition and multiple interpretations. They can never also be regarded as independent global themes disregarding the agency of multinational organizations in promoting them.

The final limitation is that the selected countries, though having several commonalities with other Arab countries in their experiences of globalization, cannot be totally representative of others. Each context is very unique and distinct in the way it responds to globalization depending on economic, political and cultural factors in addition to being diverse within itself. Nevertheless, the diversity and variation of local contexts should not divert attention from the general patterns of global influence demonstrated in the selected documents.

Despite these well acknowledged limitations, this study makes a contribution, given its limited time and resources, to exploring how global influences are reflected in the sampled education plans. If it had been possible, this research would have greatly benefitted from interviews with individuals who were involved in creating these plans or have ‘inside knowledge’ to help understand their context, meaning and purpose(s).

**Chapter Summary**

This chapter has discussed the methodology adopted for conducting this exploratory study. An interpretivist orientation guides the inquiry seeking to understand and infer meanings of the status quo. The study is of comparative cross-sectional design investigating several documents at the same period of time to enhance understanding of the phenomenon under study and allow for the identification of areas of convergence and divergence. Purposive sampling is used to select the sampled countries. The study uses document thematic analysis to answer the research questions where data is analyzed thematically using a thematic matrix instrument. Allocation to themes and subthemes follows a categorization scheme that uses a key-word approach. Quality of the study is enhanced by rigor in the sampling process, use of a key-word approach for the categorization scheme and reliance on multiple sources for the identification of thematic categories. In addition, parent plans are reviewed and excerpts of the texts are used as supporting evidence. Finally, the main limitations of the study have been acknowledged to assure a well-informed use of the research findings.
4 Key Concepts and Conceptual Frameworks

This chapter aims to illustrate the key concepts and conceptual frameworks used in this study. It starts with a discussion of the study’s core concepts of externalization, neoliberal ideologies and global educational themes. Then, it proceeds to outline the main conceptual frameworks deployed to create the analytical lens through which the study findings are interpreted. Two theories that analyze the complex phenomenon of external influences on education are portrayed. These are Dale’s Globally Structured Agenda for Education (GSAE) approach and Meyer at al’s World Society theory. This study uses a blend of both approaches as a framework to interpret global influences on educational planning in the Arab World.

4.1 Key Concepts

The core concepts identified in the context chapter as constituents of global influences on education are further discussed and elaborated in this section. This is essential before a discussion of the analytical perspective guiding the study is made. These concepts are categorized into externalization, neoliberal ideologies and global educational themes.

4.1.1 Externalization

Externalization, as defined earlier, refers to referencing sources external to a nation’s borders to justify national policies and practices. This externalization can take several forms, such as referencing international agreements and multilateral organizations; education systems of other countries; or externally produced knowledge. The use of such references emphasizes the existence of global ‘learning from others’. This learning is facilitated by supranational organizations such as UNESCO, the World Bank and OECD and International Large-Scale Assessments that have enhanced cross-country comparisons.

The tradition of transnational educational borrowing and lending, or systems searching for success stories or policies and practices that could be adopted or adapted to national contexts, has existed for a long time. However, today “comparison as a policy instrument to learn from other educational systems, or to generate or alleviate pressure to reform, has become standard practice” (Steiner-Khamsi, 2010, p. 328). While some policy makers refer to specific
education systems or practices as ‘best practice’, others resort to using the loose term ‘international standards’ to describe practices imported from elsewhere. In either case, very often does educational reform discourse include the adoption of international best practice or international standards, with no identification of what these are or where they come from, rather than explicit reference to lessons learnt from specific systems (Steiner-Khamsi, 2010).

Supranational organizations have encouraged and facilitated cross-country comparisons through publishing their studies conducted on different parts of the world and establishing International Large-Scale Assessments (ILSAs). ILSAs are tests that are administered internationally and are designed to measure educational achievement. These tests are used to assess how educational systems are performing and help identify reform priorities.

Nowadays, the functions of ILSAs have greatly expanded and league tables have become a focal point of interest. Jakobi asserts that “league tables created non-binding yet powerful standards of how the best education system should perform” (2012a, p. 396). Therefore, the rankings and performances of the different systems on ILSAs assess their outcomes, compare them to others, hold them accountable, and identify high performers as models to learn from.

In addition, and according to an OECD argument, comparisons identify the relationship between expenditure and educational outcomes and assist in policy formation (Rizvi & Lingard, 2006).

The first ILSAs were organized by the IEA in the second half of the twentieth century. They have gradually developed to include the current world-famous Trends in International Mathematics and Science Study (TIMSS) and Progress in International Reading Literacy Study (PIRLS). A more recently launched ILSA, the Programme for International Student Assessment (PISA), organized by the OECD, has become a “leading reference on the quality of education systems worldwide” (OECD, 2013, p. 1), with 72 countries participating in 2015 (OECD, n.d.). ILSAs are expected to provide knowledge to participating countries on how teaching, learning and school systems can be improved as well as formulate policies and make decision based on statistical evidence.

**4.1.2 Neo-Liberal Ideologies**

Neo-liberal ideologies, or capitalist ideologies, refer to the underlying concepts of the free market system. In developing countries, they form the predominant development paradigm (Verger, 2014). In this ideology, free markets dominate and the nation state acts as an enabler
through regulating and controlling the free market operations, yet staying at a distance from
the direct activities of the market (Jones & Coleman, 2005). This ideology has gained its
legitimacy from the triumph of the capitalist model at the collapse of the Soviet bloc and the
end of the Cold War on the one hand and its adoption by key multilateral organizations such
as the World Bank, IMF and OECD on the other. As a result, poor and developing countries
became ‘objects of bilateral and multilateral policies’ and had to transform their domestic
policies to fit into global capitalism and the neoliberal agenda (Jones & Coleman, 2005, p.
19, 38).

Jones and Coleman assert that “the global wave of neo-liberalism is the most visible and
evocative component of globalization as currently experienced” (2005, p. 39) and that most
policy frameworks mirror a good deal of this agenda. Neoliberal hegemony comes with its
free market ideologies of reduced state intervention fostering its inherent ideas of
privatization, decentralization, competition and choice.

Privatization and New Public Management

While neoliberal ideology encourages privatization and limited state interference in the free
market, this proves to be somewhat contradictory with the state’s mandate to provide quality
education for all. In order to solve this dilemma, new ways of managing public provision of
education have evolved in order to overcome the bureaucratic public-sector provision that is
known for its inefficiency and poor performance when compared to the private one. New
public management is a concept where the public sector adopts private sector practices in
order to improve efficiency or in other words increase performance or outcomes at the lowest
possible cost (Rizvi & Lingard, 2006).

These practices include a much flatter hierarchy and increased communication between
policy setters and implementers, with a focus on outcomes or results rather than processes.
This focus on outcomes has legitimized higher autonomy encouraging the concepts of
decentralization, accountability and performance management (discussed in the following
sections). Other concepts that come as by-products of new public management are strategic
planning, cost efficiency, human resource allocation, competition and choice, and the best use
of information technology (Rizvi & Lingard, 2006).
New public management has not, by any means, replaced the concern with privatization. The private sector has and will continue to play a role in the provision of education world-wide. Governments, under the neoliberal ideology are expected to create environments that encourage the private sector’s active involvement in social and economic activity. Verger (2014) argues that several vague terms such as public-private partnerships, school choice, school autonomy and innovative provision are deliberately used to avoid using the term privatization and any negative associations it may have.

An important question to ask when discussing privatization is: What is being privatized and what elements of the education system are being handed over to the private sector? The answer to this question varies from one context to the other and can take the form of transferring the ownership of public institutions to the private sector; contracting some of the educational services to the private sector; or enhancing government support for private sector institutions (Rizvi & Lingard, 2006; Verger, 2014). Nevertheless, the fact remains that privatization is a common sought target of educational reform agendas, regardless of its chosen form.

Another important question to ask is why do nation states encourage private sector provision of education? They do that for different reasons. One line of thinking argues that private provision of education creates greater choice for parents and hence fuels competition between public and private provisions, ultimately leading to better quality according to a free market ideology (Carnoy, 1999; Verger, 2014; NDS - Qatar). Another line of thinking, however, argues that governments in low-income countries should encourage private sector provision of education to support reduced government spending on education in order to relieve the government of some of the high financial burdens of providing education (SPPE, 2015).

**Decentralization**

Decentralization is another loose term that is often used and frequently commended in neoliberal ideology, but can translate into a wide variety of arrangements. Decentralization simply refers to a deliberate process that redistributes or spreads the loci of control or power to other groups (Bray, 2013), usually to lower level entities (Rodden, Eskeland & Litvack, 2003). Ideally, the school level should be the locus of decision making in education, creating the School Based Management concept as the common synonym of decentralization.
The numerous arrangements that this redistribution can entail depend on what is to be redistributed and why. Are certain responsibilities or functions being decentralized or are certain geographic areas being given autonomy in certain fields of education? Is more/less power being deliberately given to certain groups for political reasons or is the process an attempt to reduce bureaucracies?

According to neoliberal logic, decentralization would enhance quality and efficiency. One the one hand, specialist bodies or local communities are more aware of client needs and cultural contexts which allows them to provide a more relevant ‘culture-sensitive’ service and on the other, reduction of bureaucracies will reduce related costs (Bray, 2013). Carnoy (1999) similarly asserts that the increased decision-making autonomy, flexibility and control will allow for a need-based clientele service and greater accountability for educational results. The success of private schools in achieving higher quality, client satisfaction and efficiency than public schools is often used as a model for this argument. However, the decisions that are allowed to be taken at each level (school, community, province or central) are what determine what is being decentralized in education (Bray, 2013).

**Measurement of Educational Outcomes**

As part of the instrumental and new public management thinking in education, a culture of measurement has evolved. How can we measure how well an education system is performing? If the concern of educational provision is efficiency, or how to produce the maximum outcome for the minimum cost, then we need to have a means for measuring this outcome. In addition to that, measurement of educational quality facilitates public accountability of education systems. Accordingly, the need for indicators or standards of good performance emerged.

Identifying standards of good performance in education or desired outcomes is a task that is liable to wide debate. They primarily relate to the purposes sought by education, and since these are diverse and interrelated, the task becomes even more complex. International organizations’ studies and publications as well as league tables have created a quick ‘take away’ recipe for accomplishing such a task. ILSAs’ role in setting standards of good performance is continuously increasing, which “places great power in the hands of the agencies setting up the statistical variables that would determine what the proper outcomes of education should be” (Dale, 2005, p. 119).
4.1.3 Global Educational Themes

With the fast-changing world, and with the notion that education should prepare individuals for a future that is currently unknown, it becomes necessary for planners to have a rough picture of the educational qualifications that the future will require. The discourse on what students in the education system need to learn has and will continue to be highly disputed. Nevertheless, education planners are obliged to have a clear vision for what is to be taught in order to plan for the content of educational programs. Global trends in educational discourse and learning from others usually serve as a good resource for such decisions. As a result, certain educational concepts or themes have emerged and evolved to become central to educational reform discourses. Verger et al. (2012) have called these ‘global educational policies’ (GEP) and have asserted that they are not a product of traditional policy transfer or isomorphism but rather a product of globalization.

Education for the Knowledge Economy

The ‘knowledge economy’ is a term that is often used to reflect the future of a successful developed economy in the modern globalized world where “knowledge (including education, skills, information, and know-how) and its renewal and application have become critical factors for sustaining competitiveness and economic growth” (WB, 2008, p. 84). According to Rizvi and Lingard (2006) and Robertson (2005), the World Bank and the OECD have played an influential role in promoting the policy talk about the knowledge economy and how education, innovation and research relate to it. The knowledge economy is what marks a shift of emphasis from ‘production’ to knowledge’ creating the need for educational reform to adapt to this shift.

Accordingly, education systems must, on the one hand develop the skills and expertise to ‘create knowledge’ and on the other, expand enough to meet the expected increasing demand on education. This increasing demand on education will occur to assure competitiveness in the knowledge economy where “the key to prosperity is a well-educated, technically skilled workforce producing high-value-added, knowledge-intensive goods and services” (WB, 2008, p. 85). Therefore, the notion of life-long learning should become the strategy for education in a knowledge economy.
**Lifelong Learning**

Lifelong learning is another theme that has evolved in educational discourse and fostered intensively by organizations such as UNESCO and OECD, though with different interpretations and emphases over time. It is quite interesting how lifelong learning, as a term, has gained such popularity that the majority of governments nowadays incorporate it into their national education policies and reform plans. According to Jakobi (2012a), UNESCO has promoted lifelong learning over many years through publications and declarations at world conferences, while the OECD revisited the concept much later as a result of studies showing serious weaknesses in the qualifications and competencies of adults, after which several initiatives and publications about the concept were issued. The EU has also taken part in the promotion of this concept and its integration into its employment strategy (Jakobi, 2012a, p. 397). The most recent promotion of the concept is its inclusion in the fourth SDG, quality education, “ensure inclusive and quality education for all and promote lifelong learning” (United Nations, n.d.a).

The concept started with an early interpretation referring to adult education and gradually evolved to encompass the right to education and self-development in its humanistic view. Learning, should be sought throughout an individual’s lifetime and education systems should prepare individuals to be lifelong learners.

Another interpretation is that lifelong learning is a means to continuously prepare people for the world of work through allowing them to access the education and training system throughout their lives to adapt to the changing labor market. The latter interpretation is an economistic view and is used by the OECD to somehow link lifelong learning to neoliberal ideology and the knowledge economy. Rizvi and Lingard discuss OECD’s conception of lifelong learning as “what is required now are flexible, mobile, lifelong learners who have cosmopolitan dispositions and are able to deal effectively with cultural diversity, endemic change, and innovation” (2006, p. 253).

Establishment of qualification frameworks is similarly considered a way of promoting lifelong learning. Early childhood education which is thought to increase the chances of continued education and adult education are all forms of lifelong learning (Jakobi, 2012b). Seeking higher education or vocational training to update qualifications, skills and knowledge are similarly forms of lifelong learning. Therefore, the recent view is that lifelong learning
encompasses all phases of a lifetime. To ensure lifelong learning, educational systems are expected to allow access to different educational options for all and to coordinate the pathways among these different tracks. A study on lifelong learning by Jakobi asserts that though there is “global consensus on lifelong learning but a large divergence in its realization” (2012a, p. 402).

A Focus on Global Skills

The effect of globalization on how work is organized and carried out has created a demand for flexibility in the labor market. Work environments characterized by constant change cause certain jobs to become obsolete and replace them with others, requiring a different set of skills and knowledge. The unpredictability of the future emphasizes the importance of flexibility and the existence of a ‘malleable’ workforce that can easily adapt to change. Education systems, whose primary role is to prepare individuals for their future, have responded to this change by placing the focus on skills rather than knowledge and emphasizing the concept of life-long learning.

Carnoy, for instance, identifies the required skills worldwide to be “English language, mathematics reasoning, scientific logic and programming” (1999, p. 26). This emphasis on language, mathematics and science is further fostered by the variety of international large-scale assessments measuring student performance on them and the multiple science, technology, engineering and mathematics (STEM) projects and fora.

A similar attempt to identify what needs to be learned at school is the notion of 21st Century Skills. The 21st century is characterized by high technological developments and knowledge production, contrary to the previous century which was characterized by industrial production. Hence the learners need to be equipped with skills for the knowledge economy that will “allow them to benefit from the emerging new forms of socialization and to contribute actively to economic development under a system where the main asset is knowledge” (Ananiaduo & Claro, 2009, p. 5).

No concrete framework for identifying 21st century skills was established, with their identification and conceptualization left to educational planners to determine. However, the concept usually encompasses skills such as technology integration, communication and collaboration, problem solving and critical thinking, innovation and creativity.
4.2 World Society Theory

A theory that is very commonly used by scholars to interpret the increasing homogeneity in educational reform is World Society Theory developed by John Meyer and his colleagues at Stanford University. This theory attempts to explain the similarities between nation states in many dimensions and not in education in particular. It argues that “many features of the contemporary nation-state derive from worldwide models constructed and propagated through global, cultural, and associational processes” (Meyer et al, 1997, p. 144). In other words, there exist dominant world models, ideologies or scripts for how the modern nation state should function and be organized and that there exist cultural and associational processes by which diffusion of these culturally embedded scripts occurs. The nation state itself, according to Meyer et al. is an exogenously constructed entity rather than an autonomous product of internal forces (1997, p. 150).

Meyer et al (1997) argue that the world model within which nation states operate is based on rational purposes such as development, equality or progress and hence defines what local actors should work on and through what structures this should be done. This explains the great similarity or isomorphism among the structures and functions of different nation states despite the great historical, economic, political and cultural differences between them. They further argue that the development of a seemingly stateless world society in the post-war era has further intensified the importance of such models.

The world, according to the theory, is an enactment of culture and world models are culturally transcended. In other words, the way modern states are organized and the ways they operate is because of a prevailing common world culture rather than locally justified independent decisions. The common culture results from a world society, where “states participate while they are engaged in international exchange” (Jakobi, 2012(b), p. 120). The seemingly functional common-sense base of these standard ‘successful’ world models fuels their wide-spread diffusion in addition to the convenience of their use to legitimize particular national goals, structures, actions and measures.

The rationale that Meyer et al (1997) give to seeing the world this way is four-fold. First, the isomorphism or great commonalities in the structures and policies of nation states despite their variances proposes the use of a pre-set standard model. Second, the great consensus on
the nation state being the dominant form of political structure and on many issues, such as human rights, economic progress and the importance of education and their universal applicability suggests a desire to conform to a common culture. Third, the decoupling or inconsistencies between purposes, claims and intentions versus structures, practices and results indicates externally imported models being embedded in local contexts. Finally, the greatly standardized ways in which nation states expand their organizational structures such as higher education institutions for instance, with no genuine local need, further supports the idea of a prevailing common culture.

The establishment of global organizations at the end of World War II, has institutionalized, re-structured and expanded the influence of world society, facilitating the discussion and organization of a wider range of social concerns. These organizations have the capacity to link the different actors, arrange forums where concerns are discussed, develop, support and disseminate policies and practices (Jakobi, 2012b). Through rationalizing and standardizing ideas, the authority of these carriers of world culture is derived more from their scientific and professional base than from their power and resources.

However, it is important to note that nation states do not participate equally in this world society. As Chabbott explains, “This world culture is not a democratic amalgam of many cultures, rather it is a distillation of Western Enlightenment ideas about progress and justice and the unique role that science plays in them” (2003, p. 2). Accordingly, world culture represents a continuation of western hegemony and is directed from the industrialized developed world to the less industrialized or from the ‘core’ to the ‘periphery’. Nevertheless, the propelling force is rationality and professional standards rather than mere influence of dominant nation states (p.16-17). Verger further explains that according to this theory, ’common policies have been adopted worldwide due to “both the international dissemination of the values of western modernity as well as the legitimation pressures that governments receive – especially in postcolonial settings - to demonstrate to the international community that they are building a ‘modern state’” (2014, p. 15).

Dale (2000) demonstrates that education is a good resource for this theory as it represents a social field that can be well explained by world culture. The wide spread of mass schooling and the global isomorphism in curricular categories support the world culture view of standardized universal models, norms and conventions. The rational justification of this
model discusses how the appropriate socialization of children leads to the self-actualization and development and hence an ideal society. Here, the state is the locus of social organization and development and the individual is the unit of social action and, value and meaning. This resonates with Chabott’s argument that world culture views education both as human capital and a human right. On the one hand, it is the means to create the scientific minds needed to be the rational actors in the world society and the resources for nation-state building and hence economic development. On the other, it is the means of actualization of individual potential and exercise of human rights (2003, p. 8).

Though this theory has gained much popularity in studies of global dynamics of education, it has been open to wide criticism. A central critique of this theory is its underestimation of power relations and the capitalist ideological forces at the international level and its overestimation of values and the cultural base for the diffusion of the world model (Waldow, 2012). It is difficult to imagine that complex international relations can be summed in the idea of the hegemony of a certain group over the other. Moreover, the mechanism of simple diffusion implies a natural free movement of ideas and does not account for forces and pressures that on many occasions accompany this convergence.

4.3 The Globally Structured Agenda for Education

Dale attempts to recognize how globalization could affect national education policies by proposing the GSAE approach. This approach defines globalization as the external influence on national education policies where globalization refers to a “a set of political-economic arrangements for the organization of the global economy, driven by the need to maintain the capitalist system” (2000, p. 436). The triumph of the capitalist system, he argues, and the collapse of its only alternative has fueled the commodification of everything and the hegemony of capitalist principles. With increased international trade and technological advancements, new forms of supranational governance without government appeared. These new strong global economic and political arrangements have influenced education and have been institutionalized in supranational organizations that have gained a new form of power that exceeds what any nation state could have possibly had.

Globalization, with its compression of space and time, has introduced new problems to the education agenda and strengthened the role of supranational actors in education reform
(Verger 2014). The structured agenda implies a pre-defined set of problems and concerns for the nation states to consider and tackle. Therefore, major changes in education agendas “should be understood as being embedded within interdependent local, national and global political economy complexes” (Verger, 2014, p.15). The global agenda setting is done when these supranational organizations define the problems and issues and then propose certain strategies to solve them. These strategies then become globally binding to all nation states. Dale describes the impact of this process by stating that it “has changed the nature of the problems confronting nation states and the nature of their capacity to respond to them” (Dale, 2000, p. 441).

In addition, the mechanisms by which external influence affects national policies vary as well, from direct imposition to persuasion to collective agreement (Dale, 1999, p. 53). Hence, developing countries may find themselves adopting strategies that have not been produced locally nor correspond to local priorities while also not having the capacity to redirect them. This external influence becomes more intense when leverage is used through pooling of funds and technical assistance. Naturally, the funds are directed to the provider’s agenda which usually corresponds to the global agenda and not the country’s local priorities.

As the GSAE recognizes “international political economy that sees the changing nature of the world capitalist economy as the driving force of globalization and seeks to establish its effects on educational systems, even as they are also locally mediated (Dale, 2000, p. 428), it can be expected that the capacity of nation states to divert from this structured agenda varies. The position of each nation state in the global political economic arrangement will influence the ways in which globalization affects education.

Dale (1999) has built on this approach by developing a typology analyzing the different mechanisms by which external influence on national education policy occurs. He identifies nine dimensions of variability that he uses to differentiate the different mechanisms. These are: the nature of relationship, explicitness of the process, the scope of influence, the locus of viability, the process, the parties involved, the source of initiation, the dimension of power and the nature of effect on education.

Using these nine dimensions, he starts by distinguishing two broad categories of influence: the traditional mechanisms of policy borrowing and policy learning on the one hand and effects of globalization on the other. He then asserts that with regard to the mechanisms of
globalization influence that: their locus of viability is external; they embrace policy goals as well as policy processes; they are externally initiated; they exhibit different forms of power and they cannot be directly sourced to other states (p. 49). This category of global influence is further analyzed to yield five mechanisms, namely harmonization, dissemination, standardization, installing interdependence and imposition.

While this typology of mechanisms is an extremely useful tool for analyzing global influence on national education policy, its adoption requires a wider range of data that is beyond the scope of this document analysis. Much more needs to be investigated to identify the mechanism that is in action. Nevertheless, studying the dimensions that Dale has used to characterize these mechanisms can provide insights into the analysis of the documents. Dimensions of special interest are the nature of relationship, locus of viability, process, source of initiation and dimension of power.

Dale argues that the nature of the relationship in external influence determines whether this influence is voluntary, formally voluntary or compulsory according to the recipient’s capacity for resistance. Another factor is whether the locus of viability is national or external, with external loci including regional or international organization, international fora, or simply the common heritage of human kind. In addition, the process by which such influence occurs can take the forms of persuasion, collective agreement, condition of membership or leverage. Similarly, the source that initiates such influence can also vary affecting the mechanism by which national education policies are affected. Supranational bodies, the ‘international community’, NGOs, an international model or member states can all initiate such influence. Whether this influence occurs as a conscious decision, by rules of the game or as a set agenda identifies the dimensions of power in the mechanism. Searching for inferences within the documents regarding these different forms of interaction complements findings of the study.

4.4 The Two Approaches within the Context of this Study

The viewpoint that underpins this study incorporates elements of both World Society and GSAE, which is why both approaches have been introduced earlier in this chapter. It may be useful to first identify the key differences between the two approaches (table 4.1) prior to justifying the conceptualization guiding this study. This conceptualization is primarily based on the context of the sampled countries.
<table>
<thead>
<tr>
<th>Table 4.1 Key Differences between World Society Theory and GSAE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>World Society</strong></td>
</tr>
<tr>
<td>Initiator of external influence</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>View of nation state</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Driving Force of influence</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Direction of Influence</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Basis for legitimization</td>
</tr>
<tr>
<td>Mechanism for Influence</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Evidence of Influence</td>
</tr>
<tr>
<td>Concerns / conception of education</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Justification of decoupling or inconsistencies</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
Political economy, undoubtedly, plays a central role in the underlying thinking of this analysis since the sampled countries are by no means part of the hegemonic developed bloc. Therefore, world society’s interpretation of the international society is not sufficient because different nation states do not operate in it on equal grounds. It is true that world society approach does consider western hegemony, but the imbalance of power that may lead to imposition at times, cannot be justified by mere hegemony of a certain group. The GSAE’s assertion of supranational forces relating to political, economic and cultural arrangements initiating external influence better explains the high prevalence of certain trends in education reform. World society’s interpretation of an international society can only exist if nation states are in equal standings.

GSAE considers the nation state to cede some of its powers and sovereignty to supranational forces, which does partly explain the adoption of external models or recipes of good practice. Carnoy (1999) explains that globalization has forced nation states to focus more on their economic growth and competitiveness rather than national identity or local projects. This is highly debatable in contexts that have recently experienced political unrests such as the Arab world. Even countries in the region that have not had such experiences, are more concerned with national projects in order to promote public content and avoid political instability.

Generally speaking, it is difficult to ignore the agency of nation states in this process even in cases of imposition. Nation states do exercise agency and this is evidenced by the selection of some educational reform strategies and refutation of others. Dale at one point recognizes this and asserts that “while globalization does represent a new set of rules, there is no reason to expect all countries to interpret those rules in identical ways or to expect them to play to the rules in identical ways” (1999, p. 49). This dialectic between the global and the local (Arnove, 2013) proves that nation states still exercise a great deal of sovereignty over national education reform.

In agreement with GSAE, external influence on education is seen to be controlled through a structured agenda rather than the diffusion of a world culture, although world culture may be used to legitimize certain reform policies. This structured agenda fosters capitalist ideals but is not always legitimized by self-interest alone. The authoritative regimes that exist in the sampled countries of this study and the lack of transparency will not allow for the explicit use
of capitalist ideologies as legitimizing factors. A myriad of concepts is usually used, with rationality and science and world culture being common examples.

A final distinction is in the interpretation of the decoupling or inconsistencies that exist between the intended and the actual. This is seen here in accordance with world society approach as the natural result of applying externally modeled reforms in local contexts. Local actors are expected to adopt policies that are very foreign to them, creating new versions and distorted models. GSAE’s interpretation of these inconsistencies as resulting from the state’s capacity to divert from the agenda implies the unwillingness of the state to comply to this agenda and falls short in the cases where the state voluntarily chooses to conform to or adopt certain policies. Since the nation state’s agency is highly acknowledge in this study, world society’s interpretation of inconsistencies seems more appropriate.

In short, the analytical lens through which this study is conducted assumes that the nation state retains much of its agency over national education policy and that this agency lies in their decision to submit to supranational forces, either totally or partially for different reasons and justifications. The existence of supranational economic, political and cultural forces that shape most of education strategies and reform programs is highly acknowledged with political economy specifying the direction of the influence. External influences on education support capitalist ideologies, but use science and rationality in addition to self-interest for their legitimization. The influence takes the form of a structured agenda that is externally modelled and locally employed, leading to numerous transformations and multiple adaptations of the original agenda.

**Chapter Summary**

This chapter has defined and discussed the key concepts and themes used in this study to allow for their use in the collection, analysis and interpretation of the research data. In addition, the chapter has identified the analytical perspective that the study uses to interpret the findings of the study. This perspective uses insights from both World Society theory and GSAE to create a model for analyzing the special context of the Arab world.

This created model agrees with World Society theory in that nation states are rational actors and do select certain models, however disagrees with the notion of them being members of a world society as this notion implies an equal positioning of all nation states. On the contrary,
the model asserts that political economy and power imbalances do exist and rather than adopting a dominant world culture, nation states follow a GSAE promoted by supranational organizations and not a world society. Nation states’ powers have not diminished and this is evidenced by the various ways by which they select, manipulate and transform imported models asserting their agency in the process.
5 The Region, the Countries and the Documents – Backdrop

This chapter presents a brief overview of the Arab world and the sampled countries. The socio-economic and political contexts are introduced and a brief outline of the education systems and the education reform documents under study is given. The chapter is divided into two main parts. The first portrays the basic features of the Arab world as a region while the second takes a closer look at the four sampled countries and their reform documents used as sources of data for this research.

The significance of this contextualization is three-fold. First, the socio-economic and political setting is an important factor that impacts the way globalization operates and how local contexts respond to it (Dale, 2005). Therefore, it has implications for the analysis and interpretation of the study’s findings. Second, knowledge of the basic features of the Arab world’s member states clarifies the grounds upon which the selection of the sampled countries was made. Third, knowledge of the education systems in the sampled countries provides a backdrop of the context of the documents under study and enhances the comprehension of their content.

5.1 Overview of the Arab World

5.1.1 Member States, Geography and Demographics

The Arab World is a world region that incorporates 22 countries located mainly in the Middle East and North Africa geographic area. The 22 countries of the Arab world form the Arab League, with the diverse dialects of Arabic as the dominant language and Islam as the dominant religion followed by Christianity. It represents a distinct region of the five UNESCO regions (Africa, Arab States, Asia and the Pacific, Europe and North America, and Latin America and the Caribbean) (UNESCO, n.d.). The map below illustrates the individual states of the Arab world and their geographic locations. Though the 22 countries are part of the Arab League, research on the Arab world is usually confined to the 17 countries in the Middle East and North Africa (MENA) region, namely Algeria, Bahrain, Egypt, Iraq, Jordan,
Kuwait, Lebanon, Libya, Morocco, Oman, Palestine, Qatar, Saudi Arabia, Syria, Tunisia, United Arab Emirates and Yemen.

Map 5.1 Map of the Arab World

Despite their varying political systems, economic conditions and levels of development, much is shared among this group of countries other than language and social and cultural traditions, making researching them as a region quite common. The Arab countries are part of the ‘developing world’ and are all post-colonial states. They have centralized economic systems, with the government being the main provider of public services and the lowest private sector contribution in the world (UNDP, 2016). However, efforts of privatization of much of these services have recently been common. Despite the fact that not all of them have official monarchies, almost all of them lack democratic systems of government.

5.1.2 The Socio-economic Context

The Arab community is socially diverse. This heterogeneity has led to inequalities in wealth, power and prestige and a ‘pyramidical social structure’ with the majority being poor, a small middle class and a few at the top of the pyramid with wealth and power. Inequities in wealth distribution and high disparities between rich and poor (Mazawi, 1999) still represent the status quo of most Arab societies today.

These great disparities do not only exist within individual countries (inter-state) but among Arab countries as well (intra-state). The oil producing Arab Gulf states or Gulf Cooperation Countries (GCC) of Bahrain, Kuwait, Qatar, Oman, Saudi Arabia and The Emirates have experienced a “tremendous transformation of almost all aspects of their socio-economic and political life” (Bahgat, 1999, p. 128) since their great reserves of oil were discovered. Nowadays, some of these Gulf states have reached top ranks in per capita income in the world. This has put the Gulf states in a somewhat distinct category within the Arab region, as
they represent the rich oil-producing group. The socio-economic conditions in these countries are far better than other Arab states. However, the structure of ‘the few ruling elites’ (based on tribal diversities) similarly prevails.

Using global indices and measures to reflect the level of development of Arab countries could be a useful way to acknowledge the diversity within the region and understand its odds. The table below summarizes some of the basic socio-economic data of the MENA region Arab states using rankings of global indices. These are the Global Competitiveness Index rankings (WEF, n.d.b); Gross National Income per capita rankings (WB, n.d.a); and Human Development Index rankings (UNDP, n.d.a). The purpose of laying out this diverse data is simply to highlight the disparities in the socio-economic living conditions of the Arab World and form a rough picture of how they can be clustered for analytical purposes.

Table 5.1 Arab countries’ rankings in socio-economic indices

<table>
<thead>
<tr>
<th>HDI Rank 2015</th>
<th>GCI Rank 2015-2016</th>
<th>GNI per Capita -PPP 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qatar – 33</td>
<td>Qatar – 14</td>
<td>Qatar – 2</td>
</tr>
<tr>
<td>Saudi Arabia – 38</td>
<td>UAE – 17</td>
<td>Kuwait – 8</td>
</tr>
<tr>
<td>UAE – 42</td>
<td>Saudi Arabia – 25</td>
<td>UAE – 12</td>
</tr>
<tr>
<td>Bahrain – 47</td>
<td>Kuwait- 34</td>
<td>Saudi Arabia – 20</td>
</tr>
<tr>
<td>Kuwait – 51</td>
<td>Bahrain – 39</td>
<td>Bahrain – 30</td>
</tr>
<tr>
<td>Oman – 52</td>
<td>Oman – 62</td>
<td>Oman – 40</td>
</tr>
<tr>
<td>Lebanon – 76</td>
<td>Jordan – 64</td>
<td>Iraq – 90</td>
</tr>
<tr>
<td>Algeria – 83</td>
<td>Morocco – 72</td>
<td>Algeria – 105</td>
</tr>
<tr>
<td>Jordan – 86</td>
<td>Algeria – 87</td>
<td>Lebanon – 109</td>
</tr>
<tr>
<td>Tunisia – 97</td>
<td>Tunisia – 92</td>
<td>Tunisia – 123</td>
</tr>
<tr>
<td>Libya – 102</td>
<td>Lebanon – 101</td>
<td>Egypt – 124</td>
</tr>
<tr>
<td>Egypt – 111</td>
<td>Egypt – 116</td>
<td>Jordan – 136</td>
</tr>
<tr>
<td>Palestine – 114</td>
<td>Morocco – 145</td>
<td></td>
</tr>
<tr>
<td>Iraq – 121</td>
<td>Palestine – 177</td>
<td></td>
</tr>
<tr>
<td>Morocco – 123</td>
<td>Yemen – 188</td>
<td></td>
</tr>
<tr>
<td>Syria – 149</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
5.1.3 The Political Context

The political regimes in the Arab states, despite their diversity, are commonly described as being persistently authoritarian with little, if any, practice of democracy. People “live under the impression of being participants without actually participating in the making of decisions” (Waghid & Davids, 2013, p. 345). This economic and political exclusion along with widespread poverty, corruption, unemployment and widening social inequalities led to a series of protests in many countries of the Arab world, what is commonly called ‘The Arab Spring’.

The 2011 uprisings and ‘waves of protest’ in several Arab countries gave hopes for changes at the political level at their start, especially with some leaders stepping down their positions as was the case in Egypt and Tunisia. However, and as Dalacoura (2012) predicted, these uprisings have not led to the collapse of authoritarian regimes, and today 7 years later, it seems that little has changed with respect to politics in Arab countries, despite the newly formed constitutions and the theoretically fair elections and public participation in political life. On the contrary, the instability and chaos that these uprisings have caused, led to a deterioration in the social and economic conditions and a prevailing loss of hope for a better future. Conflicts in countries such as Libya, Yemen and Syria have even ignited civil wars that have caused total turmoil in the region. Even in monarchies that have not had uprisings, such as Morocco and Jordan, leaders and governments felt the need to introduce some changes in the political arena. Morocco, for example strengthened parliament and made Amazigh (Berber) an official language (Dalacoura, 2012).

Today, Arab countries are either in civil war or back to authoritarian regimes that are practising tighter control than ever before. Countries that have slipped into civil war are used by current leaders as clear examples of societies that have revolted against their regimes. Accordingly, Arab societies have somewhat surrendered to the idea that authoritarian regimes are far a better option than turmoil and destruction. Yet, current leaders are also promising better futures and setting plans for development.

5.1.4 Education in the Arab World

After their independence, most Arab states in the 1950s and 1960s enacted education as a right to all citizens with the government being responsible for providing this right through free education to all, at primary to tertiary levels in countries as the Meghrib (Algeria,
Morocco and Tunisia), Egypt, and Syria (WB, 2008, p. 24). This entailed the establishment of mass education systems to meet the demands of a modern state. Most countries adopted a highly centralized system with the government assuming the responsibilities of policy making, funding and service delivery where schools and universities were state property and teachers were civil servants (WB, 2008, p. 141).

Education in the Arab world has seen great improvements in the last decades with respect to enrollment in primary education, literacy rates and gender disparities. Enrollment rates in primary education rose almost 10% from 1999 to 2012, with many countries close to reaching universal primary education (UNDP, 2016, p. 31). However, the degree to which education has contributed to economic growth, poverty reduction, and social equality has not been as promising. Several reform efforts have been set in the region through political or legal acts that aimed at “enhancing national identity, expanding enrollment to eligible children and adults in formal education, and improving the quality and efficiency of delivering education services” (WB, 2008, p. 138). Nevertheless, quality and efficiency of education systems remain a great challenge. Moreover, recent conflicts in Syria and Yemen have made out-of-school children on the rise constituting an additional challenge to the progress made in the previous two decades.

Issues of quality of Arab education, however, persistently prevail. The quality of Arab education outcomes is evaluated to be lower than other developing countries in Latin America and East Asia (WB, 2008, p. 12). This has been attributed mainly to the high population growth rates and lack of resources to provide mass education (Masri, 2009). International and national reviews of educational quality highlight the below average quality of education in the Arab World, even in the rich GCC countries. This judgement is typically based on results in standardized international tests such as TIMSS and PISA, and the mismatch between graduate skills and labor market requirements as indicated by employer surveys (UNDP, 2016). Other reasons include centralized governance and weak school empowerment (Masri, 2009), lack of public accountability (WB, 2008), teacher centered pedagogies, curricula that do not encourage critical thinking, analysis or interpretation in addition to poor teacher training and qualification.

Education in the Arab world cannot be discussed without paying due attention to the Arab League Educational, Cultural and Scientific Organization (ALECSO). ALECSO was founded
in 1970 as one of the institutions of the Arab League whose main concern is enhancing the fields of education, culture and science through human resources development, allowing intellectual unity and facilitating dialogue between the region and other cultures of the world (ALECSO, n.d.). The organization runs several projects, independently and in partnership with other regional and international organizations.

The ALECSO website reveals two main documents concerning education in the Arab world: 1) a plan for education in the Arab world dating back to 2008 and 2) a report on education in the Arab world dating to 2012. The executive summary of a strategic plan for ALECSO 2017-2022 has recently been uploaded. This summary explicitly states that not much attention is given to ALESCO’s plans from member states in terms of coordination and implementation “given the existence of similar national or international (UNESCO, World Bank) programs” (ALECSO, 2017). Ironically, most of the data used in ALECSO’s 2012 report was from UNESCO and World Bank sources, which could justify the lack of attention to it. This represents the insignificant role that ALECSO plays in influencing Arab education, which is not very different from the influence of its parent organization - the Arab League. The alleged cooperation of members of the ALECSO has not yielded any genuine cooperation in education (Tjomsland, 2005).

5.2 The Empirical Country Cases

The previous section has introduced the Arab world as a region, highlighting the commonalities and diversity within it. The four countries selected for this study represent, to a degree, the general diversity in the Arab world. Qatar is a high-income Gulf state with high ranking on development and education, Jordan and Tunisia had been higher middle-income countries but have dropped recently to join Egypt as low-middle income countries. The countries also vary in their political systems and their experiences with the recent Arab Spring.

This section aims to illustrate some of the special features of the sampled countries with respect to their geography, demographics, socio-economic and political status, and the size of their education systems. The educational plans used for the document analysis of this study are also introduced to furnish a backdrop for the analysis and discussion of the study’s findings.
5.2.1 Egypt

Egypt is the most highly populated of the Arab states with a population exceeding 93 million in 2015 (UN, n.d.b), stretching over an area of a little less than 1 million square kilometers (UN, n.d.c). Egypt is founded as a republic with a parliament and an elected president. It is one of the Arab states that have gone through the 2011 uprisings with the immediate result of the stepping down of Hosni Mubarak, its president at the time. Political and social chaos followed this uprising with several interim governments and presidents. In 2014, an amendment to the constitution was made and a Sustainable Development Strategy initiated. Plans for reform across all sectors were drafted in an attempt to put Egypt back on the development track. Today, Egypt has somewhat stabilized politically and economically, but the aftermath of the uprisings will continue to affect Egypt for several years to come.

The education sector in Egypt served 19.9 million pre-university students in 2015, through 52000 schools that represent public, private and special education provisions (Ministry of Education, Egypt, n.d.). Egypt ranked 141/144 in the primary education quality indicator and had an illiteracy rate of 28% for the population aged 15-35 years in 2014 (SDS, p. 172,175). With the upcoming youth bulge, pressure on educational provision is expected to soar. Population growth has for long been the primary factor that low-quality education has been attributed to. Population growth is thought to have strained the education budget causing a tradeoff between access and quality and that “this was reflected in the high-density classes, the multiple shift schools, poor school facilities, curriculum, programs, teaching methods, tools, and competencies of teachers, administrators as well as inadequate evaluation systems, methods and tools” (SPPE, 2014, p. 5).

Following the 2014 amendment to the constitution and the decline of the political unrest, the Egyptian MoE was requested to draft a strategic plan for pre-university education ending in 2030, with specific 3-year programs as a foundation. The SPPE 2014-2030 was created announcing education to be Egypt’s national project and using the motto ‘Together we can provide quality education to every child’. The plan states that it was developed with the participation of all stakeholders, civil society organizations and received technical and material assistance from UNICEF, UNESCO, IIEP, USAID and others. The plan acknowledges the former focus of earlier reform plans on providing access to education due to the increasing quantitative demand on educational provision and identifies quality to be its
main current challenge. The plan is structured into three main themes: access, quality and governance of education, discussed at the different educational levels of early years, primary, preparatory, secondary and technical & vocational education.

At the same time of drafting this plan, the OECD was commissioned to conduct a full study of the status of education in Egypt, highlighting broader public policy issues (OECD, 2015). On the national level, the SDS Egypt’s Vision 2030, was also created in 2014 illustrating a vision for Egypt by 2030. The strategy has three dimensions: economic, social and environmental with education being a part of the social dimension. The simultaneous evolution of these reform plans reflects the new regime’s attempts to take measures that assert its intentions of putting Egypt back on the development track and restoring its citizens’ hopes for a better future.

5.2.2 Jordan

The Hashemite Kingdom of Jordan is located in the heart of the high-conflict Arab states of Iraq, Palestine and Syria, with an area of 89,320 square kilometers (UN, n.d.c) and a population of over 9 million (UN, n.d.b). It has maintained its political stability amidst the upheaval that took place in many neighboring countries. Jordan is a parliamentary constitutional monarchy and has been classified as an upper middle-income country until 2017 but has had its status changed to be a lower middle-income country in the last World Bank classification. This could be attributable to the huge influx of refugees from Syria and Iraq that have strained the country’s limited resources and negatively impacted trade routes, foreign investments and tourism (WB, n.d.g). The World Bank has an active portfolio with Jordan with 12 projects valued at $745 million in loans and grants in the sectors of education, health, environment, social protection, youth, access to finance, and the business environment (WB, n.d.h).

The education system in Jordan, that served 1.57 million students in 2014 (EPDC, 2014), has a better standing than most other Arab states, with the exception of the Gulf states and Lebanon. It has reached gender parity in primary education in 1979 and has a female literacy rate of 95.2%, one of the highest in the region (NHRDS, 2016, p. 18). The quality of primary education in Jordan is ranked 69th out of 140 countries as per the Global Competitiveness report 2015-2016 (WEF, n.d.b). Jordan is among the Arab states that have encouraged household contribution to education and private provisions of tertiary education at an early
stage. It is currently receiving support from the World Bank for its education reform program that aims to expand access to early childhood education and improve student assessment, teaching and learning (WB, n.d.h).

Though relatively better performing than other Arab states, Jordan faces several challenges in its education system. First, its students’ outcomes are not commensurate with expectations as almost half of the students fail the secondary stage high stakes exams – Tawjihi. Moreover, the skills of the graduates do not match labor market needs, with youth unemployment reaching 31.8% (NHRDS, p. 18). Other challenges include inadequate qualification and development of teachers and weak accountability structures.

In March 2015 King Abdulla II, Jordan’s monarch, ordered the formulation of a 10-year human resources development strategy encompassing all stages of education starting from early childhood and reaching the job market. The purpose of this request was to “equip future generations with tools of knowledge and education, excellence and innovation that allow them to compete on the local, regional and international levels” (NHRDS, p. 4). Accordingly, the NHRDS 2016-2025 was produced as a results-based strategy to enable Jordan to meet its goals for sustainable development and counteract the decline in the education system, evidenced by results of international tests (Jordan, 2025, p. 24). The strategy draws on the national development strategy Jordan 2025 and the National Employment Strategy (NHRDS, p. 17). The plan identifies five key principles for reform: access, quality, accountability, innovation and mindset and categorizes the strategic objectives for each of the four sectors of education (early childhood – basic and secondary – vocational education and training - higher education) according to these principles.

The national development strategy, Jordan 2025, was created in response to the economic challenges posed by the continuous suspension of gas supplies from Egypt and the influx of Syrian refugees, which have negatively affected the citizens’ standard of living and increased the country’s debt (Jordan 2025, p. 8). The strategy has four pillars: society, business, citizen and government with education situated in the citizen pillar.

5.2.3 Qatar

Qatar, in this study, serves to be representative of the oil-rich Gulf states of the Arab World. It holds a quite different context among the countries sampled in this study, being the second
smallest Gulf state with an area of 11,610 square kilometers (UN, n.d.c) and a population of about 2.5 million in 2015 (UN, n.d.b). It is ruled by the Al Thani family, which is, according to some sources, regarded as an absolute monarchy (CIA Factbook, n.d.). Qatar is a high-income country that has scored top world ranks in per capita GDP for many years due to its oil rich economy and small population. It has also been the top Arab state in almost all global development indices. Qatar has recently had a diplomatic rift with its GCC neighbors, weakening its growth prospects, however its financial buffers and good infrastructure have blunted the effect of the sanctions imposed by GCC countries (WB, n.d.f).

High income and a small population are not the only attributes that characterize Qatar. Like many of its neighboring Gulf states, the rapid economic growth in Qatar has made the labor market mostly reliant on expatriate workforce, hence making Qatari citizens a minority in their own country. Though official statistics do not show the percentage of Qatari nationals, some sources estimate it to be less than 15% of the population (Gulf Research Center, 2015). The country has a modern western style infrastructure but has not had the time for local growth, maturity or development of the capacities of its indigenous population (Kirk, 2015). Well aware of this, the country has embarked on education reform that started with the establishment of a Supreme Education Council in 2002 and initiated programs targeting school autonomy, curriculum, pedagogy, teacher and leadership performance evaluation and use of technology (ETSS, 2011).

Education in Qatar, as would be expected, enjoys high facilities and a modern infrastructure. Qatar has scored the 9th rank in the quality of primary education indicator in the Global Competitiveness report 2015-2016 (WEF, n.d.b). However, its major challenges have been identified as poor student performance in math, science and English, weaknesses in administration and preparation of teachers, low quality of some private schools, incomplete alignment between curriculum and labor market needs and the insufficiency of multiple pathways beyond secondary education that allow life-long opportunities of learning (ETSS, 2011, p. 8).

The most recent published plan for educational reform in Qatar is the executive summary of the ETSS 2011-2016. The ETSS was produced to realize the goals of Qatar’s National Vision 2030 and align education and training to labor market needs as well as the aspirations and abilities of individuals (ETSS, Preface). The ETSS designed projects to attain the 21
outcomes that Qatar’s NDS 2011-2016 has defined for the education and training sector as part of the human development pillar of the NDS.

5.2.4 Tunisia

Tunisia is a relatively small sized Arab state of 163,610 square kilometers (UN, n.d.c) and a population of a little over 11 million in 2015 (UN, n.d.b). It is one of the Meghrib countries located on the western side of North Africa. Like Jordan, Tunisia had been in the upper middle-income countries classification in 2013 but has changed in the past couple of years to become a lower middle-income country. Tunisia is a parliamentary republic and has had the first of the 2011 uprisings and is thought to have inspired the Arab Spring revolutions. As in all states that have gone through the Arab Spring uprisings, the socio-economic and political contexts have been highly unstable since then. Tunisia, however has managed to overcome this instability, at least on the political level, and concluded its transition period with the election of a new government in 2015 (WB, n.d.d).

Despite its limited resources, Tunisia has outperformed other Arab states in achieving EFA and gender parity with over 99% UPE achievement, and is projected to achieve the EFA goal of ensuring that all children who have access to primary school also complete it (EFA, 2015). The education system in Tunisia served 2.09 million pre-tertiary students in 2013/2014 through 8515 schools with the private sector serving only 5% of this population (ESSP, 2016). Education, however, has not been adaptive to changes in the environment nor has it led to the expected social mobility, which has caused the learner-school relationship to weaken and drop-out rates to reach 1.1% in primary, 9.4% in middle school and 12.1% in secondary school in 2013 (ESSP, 2016, p. 14). The quality of primary education in Tunisia is ranked 86th out of 140 countries as per the Global Competitiveness report 2015-2016 (WEF, n.d.b).

Pursuant to the Arab Spring transition and upon the election of a new government in 2015, several documents for development were produced in Tunisia: a national development plan and a guidance document for it, an education sector strategic plan, and the White Book – the educational reform project. All of these documents were produced in 2016 and illustrated the roadmap for Tunisian development. Educational plans focused primarily on equity issues in addition to issues related to quality and governance.
Chapter Summary

The chapter has outlined the basic socio-economic and political features of the Arab world and the commonalities and differences that exist among its states. These commonalities include a postcolonial, developing-nation categorization, centralized governments, an elitist social structure, non-democratic regimes and recent political challenges. The region is diverse primarily in terms of its income and development levels. Education in the region is almost accessed by all primary children but lags in terms of quality. The four countries sampled in this study demonstrate the variety existing within the region in terms of income levels, population and performance of their education systems. Egypt, Jordan and Tunisia have produced documents for educational reform in the 2015-2016 period, reflecting the end of the post Arab Spring transition and the beginning of a new era. On the contrary, the most recent document for Qatar dates back to 2011, reflecting its isolation from such political instabilities. The timing and context of these documents provides very useful insights to interpreting the findings of this study.
6 Empirical Findings

This chapter lays out the main empirical findings of the document analysis. It answers the first three research questions pertaining to 1) the explicit and implicit references made to the external world, and 2) the main global concepts and themes that can be found in the documents. The chapter is organized thematically (horizontal analysis) as per the themes that were used for the categorization of the data. Findings relating to each country can be found within the themes.

6.1 Externalization

Externalization, as a theme used to categorize data in this study, refers to references made within the documents to the world external to the country’s national borders. These ‘non-local’ references are usually used to legitimize national policy and practice (Popkewitz, 2004). In the study, such references are found to fall under four main sub-categories: references to international agreements, references to multi-lateral organizations, references to other countries or regions of the world and references to a world-wide ‘group’ or ‘entity’.

6.1.1 International Conventions / Declarations

References to international agreements and decrees are found in the education sector plans of Egypt, Jordan and Tunisia. The Declaration of Human Rights, Child Rights and the EFA are the most common. Others include Rights of Persons with Disabilities and declarations of other international and regional conferences. National plans, on the other hand, do not mention such declarations, except for Egypt’s SDS where conformity to SDGs is affirmed. Table 6.1 summarizes the conventions that appear in the plans.

The context in which these agreements and conventions are referenced takes several forms. The most common form is them being a ‘base’ or ‘framework’ out of which the plans evolve, in addition of course to other national bases and frameworks such as constitutions and by-laws. Expressions such as ‘in consistency with..’ or ‘the plan is committed to..’ are common. In less common instances, are the declarations referred to as ‘guiding’ the planning process. Egypt’s SDS even describes international agreements as being “beyond the control of the government” (SDS, 2015, p. 7).
Table 6.1 International conventions and declarations referenced in the documents

<table>
<thead>
<tr>
<th></th>
<th>Declaration of Human Rights – Declaration of Child Rights – EFA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Egypt SPPE</td>
<td>UN Declaration of Human Rights – Declaration of Child Rights – EFA</td>
</tr>
<tr>
<td>Egypt SDS</td>
<td>UN Sustainable Development Goals – Fourth goal</td>
</tr>
<tr>
<td>Jordan NHRDS</td>
<td>Convention of the Child Rights – Convention of Rights of Persons with Disabilities</td>
</tr>
<tr>
<td>Qatar</td>
<td>None</td>
</tr>
</tbody>
</table>

In general, these agreements, regardless of the different vocabulary that is used to describe them, are expressed as being *legally binding* in those plans. The following excerpt demonstrates this context.

*By signing the Education for All initiative and the Millennium Development Goals, Egypt is committed to the international community to offer opportunities for enrollment in and completion of secondary education for both boys and girls in the age group (12-14) by 2015 (SPPE Egypt, p. 24).*

### 6.1.2 Multi-lateral Organizations

The explicit reference to multilateral organizations such as the UN and its bodies (UNESCO – UNICEF), the World Bank and the OECD is present in all the documents used in this study, though in varying contexts and for various purposes. These organizations seem to be an integral part of many of these plans, whether as owners of international conventions (discussed earlier) or providers of material and technical assistance to education or, most importantly, as providers of knowledge.

**Multi-lateral Organizations as Providers of Material and Technical Support**

Multi-lateral organizations appear in the educational plans of Egypt and Jordan as providing technical and material support. The foreword of the SPPE states that

*Technical and material support has been provided by UNICEF, UNESCO, and UNESCO International Institute for Educational Planning, in collaboration with the United States Agency for International Development, and the British Council (SPPE Egypt, p. 3).*
In addition to assistance with the preparation of the document, UNICEF is also referenced as involved in the *community schools* project in Egypt.

As for Jordan, the World Bank and other Aid agencies have had and still have a myriad of projects in the education sector, the most referenced of which is the World Bank’s Educational Reform for the Knowledge Economy (ERfKE) project (NHRDS, p. 67). UNESCO has also partnered with the Jordanian Ministry of Education to develop the Education Management Information System (EMIS) and UNICEF is conducting early childhood studies and other programs that would enhance policy making in the country (NHRDS, p. 70). The Syrian refugee crisis has even added to this myriad more projects and initiatives by the UN High Commission for Refugees in order to assure the education of refugee children (NHRDS, p. 114). Other agencies such as CEDA and Questscope similarly fund education projects in Jordan.

**Multi-lateral Organizations as Providers of Knowledge**

Perhaps the most salient finding of this study is the immense role of multi-lateral organizations as knowledge producers. All documents reference multi-lateral organizations as sources of knowledge, either by referencing results of studies conducted by them or statistics collected by their local offices. Moreover, these organizations are simultaneously the initiators of international conventions and ILSAs. With all this in mind, it is not surprising that the existence of international organizations in these documents is quite widespread. However, this category is limited to the explicit mentioning of them as authors of studies, statistics or theories.

World Bank studies are evident in the educational plans of both Egypt and Jordan, although with different intensities. Jordan’s plan extensively references World Bank sources compared to Egypt, which references them only a few times. World Bank sources are mainly used for data related to the Bank’s activities: expenditure analysis, rates of return analysis, equity in education, efficiency in the governance of education and statistics pertaining to projects that the bank has conducted.

*According to World Bank analysis, access to ECED in Jordan is significantly inequitable. The most advantaged children have a 44% chance of attending early childhood care and education compared to a 5% chance for the least advantaged children (NHRDS Jordan, p. 64).*
UNESCO sources, on the other hand, are referenced when statistics relating to enrollment in education and gender parity are used, especially using EFA national reports. UNICEF sources are similarly referenced when issues pertaining to out-of-school children, violence and child labor are discussed. The plans of Egypt, Jordan and Tunisia all reference UNESCO and UNICEF sources for both facts and figures on the one side and recommendations related to education policy and best practice on the other.

*UNESCO has defined the key themes that help support comprehensive ECED provision: access and equity, quality, parental and community engagement, investment and financing, and coordination and integration* (NHRDS Jordan, p. 61).

*A UNICEF study carried out in 2010 shows that up to 23% of children under fifteen live in poverty resulting from illiteracy* (SPPE Egypt, p. 9).

The OECD is also referenced in the documents as a provider of knowledge, though the samples countries are not OECD members. Nevertheless, the OECD is establishing strong grounds in the education field with the help of its PISA test that is gaining increasing popularity as a measure of student learning. Not only does the PISA serve as a measure of student achievement, but it is also used as a tool to evaluate education systems, compare them and identify models to learn from. The data and statistics that accompany PISA results have also become important sources of information for education policy makers. PISA results and statistics are used to inform the educational plans of Tunisia, Jordan and Qatar.

*PISA experts evaluate every 39 points to equal one year of education, which means that the difference between the average of 15-year-olds in Tunisia and OECD countries average (109 points) is equivalent to 2.7 years of education* (ERP Tunisia, p. 76).

In addition to PISA, the OECD conducts studies and surveys in its member states and establishes an OECD average for many indices and indicators. This OECD average is used as a benchmark by both Jordan and Qatar.

### 6.1.3 Regional / Cross-Country Comparisons

Regional and cross-country comparisons are similar, to a great extent, to traditional policy borrowing and lending, where countries look for practices, models and systems that they can learn from. Typically, countries look for ‘comparable’ others or contexts that are similar to theirs’. Global indices and ILSAs have facilitated such comparisons more than ever. In this
study, explicit comparisons with world regions, groups of countries and other individual countries were evident for two main purposes: for benchmarking and ranking as well as for learning and financial cooperation.

**Regional / Cross-country Comparisons for Purposes of Benchmarking**

Comparisons with individual countries is not common in the documents of this study. Rather, generally described ‘groups’ of countries are used to establish status quos and achievement targets. Qatar, to the contrary, uses specific countries as units of comparison. In the table below, the groups used by each country are outlined.

<table>
<thead>
<tr>
<th>Country</th>
<th>Benchmark Targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Egypt</td>
<td>Developed countries</td>
</tr>
<tr>
<td>Jordan</td>
<td>Countries of similar income levels</td>
</tr>
<tr>
<td></td>
<td>Highest performing school systems as per TIMSS / PISA</td>
</tr>
<tr>
<td></td>
<td>Developed Societies / OECD Countries</td>
</tr>
<tr>
<td></td>
<td>Comparable countries / Arab World / Middle East</td>
</tr>
<tr>
<td></td>
<td>Countries with similar population, business environment and natural resources</td>
</tr>
<tr>
<td>Qatar</td>
<td>Gulf Region / GCC countries</td>
</tr>
<tr>
<td></td>
<td>OECD / European countries</td>
</tr>
<tr>
<td></td>
<td>UK – Korea – Finland – Norway – Canada – Ireland – Belgium – New Zealand – USA</td>
</tr>
<tr>
<td>Tunisia</td>
<td>Developed countries – OECD average</td>
</tr>
<tr>
<td></td>
<td>High quality education systems</td>
</tr>
</tbody>
</table>

**Regional / Cross-country Comparisons for Learning and Financial Cooperation**

More frequently than for purposes of benchmarking, are country comparisons made for purposes of learning. Learning from the ‘experiences of other countries’ is referenced in the plans of Egypt and Jordan and Qatar in the context of good practice. Egypt’s SPPE also mentions cooperation with the Emirates and Sudan on individual educational projects. However, only in Jordan’s plans are references made to educational practices of specific countries. Experiences from Sweden, Turkey, Kenya, USA, Singapore, Denmark, Germany, UK are drawn to inform policy and practice.
Developed and developing countries strongly focus on "learning," not "education," and use up-to-date technological means to develop various educational instruments. Egypt is still far below the level of such developments (SDS Egypt, p. 172).

As international experience suggests, successful education reforms, though they may take many years to realize their full benefits, will be to the advantage of all who live and work in Qatar, if consistently implemented (NDS Qatar, p. 124).

In high performing TVET systems, funding methods are typically used as a lever to enhance quality and alignment with national priorities, as illustrated in the UK example (NHRDS Jordan, p. 150).

6.1.4 World-wide Comparisons

The most common type of comparison evident in the documents of this study is benchmarking with the ‘international’ or the ‘global’. These two terms are used loosely in all documents to reflect a country’s status in comparison to the rest of the world, rather than specific regions or classified groups as in the previous category. Such comparisons are sometimes made using specific measures such as global indices or performance on ILSAs, but more commonly made without reference to any definite criteria or indicators. There is a higher tendency to use terms such as ‘international standards’ or ‘international best practices’ than identify what these actually are and how they can be measured.

World-wide comparisons using Indices

Global indices are commonly used to identify how a country ranks in a specific field in comparison to others. Use of indices is more evident in national plans rather than educational plans in this study. The Human Development Index is referenced in the national plans of Egypt and Tunisia, while per capita income is referenced in Qatar and Jordan. Other international indices of vocational education, primary education, public expenditure, enrollment rates, university rankings and global competitiveness reports are also cited in the national plans of Jordan and Egypt.

World-wide comparisons using ILSAs

ILSAs are being used for evaluation and comparison of education systems in an unprecedented manner. All documents in this study have mentioned the respective country’s rank in ILSAs, with TIMSS and PISA evidenced across the board. Performance on ILSAs is
used in the documents to identify the status quo of educational outcomes, position the educational system within a global context and urge and legitimize certain policy directions, even for countries (such as Egypt) that have not participated regularly in them.

> Of 48 countries, Egypt has ranked the 38th in mathematics and 41st in science in the international competition TIMSS in 2007 (SPPE Egypt, p. 41).

> At the international level, Jordan’s attainment in TIMSS has declined in comparison to other countries with similar levels of economic development (Jordan Vision, p. 25).

> On national and international tests, many Qatari students perform below expectations in core subjects such as math and science. Programmes should be considered to support students who are weak in these areas, so that they can successfully continue their schooling (NDS Qatar, p. 135).

**General World-wide Comparisons**

On numerous occasions do the documents casually mention world-wide benchmarks as loosely defined ‘international’ or ‘global’ best practices, standards, averages or levels. These are often used to reflect the best world-wide standards, without the burden of specifying them or being bound to concrete definitions or ranks.

> The school today has to adapt to these changes to guarantee that its outcomes match these international standards and the knowledge, skills and competences required of the global economy and the new reality it has enforced (ERP Tunisia, p. 25).

> The education and training initiatives are based on benchmarking of international best practices (NDS Qatar, p. 124).

**6.2 Neo-Liberal Ideologies**

Neo-liberal ideology, inherent in the free market system where education is regarded as a tool for qualifying human capital, along with all the concepts that accompany it, is strongly evident in the educational and national plans of the four Arab countries. The importance of education in qualifying the labor force, the encouragement of privatization and decentralization as well as the inevitability of having performance management systems that lay out standards, evaluate and measure outcomes, and practice accountability are highly
emphasized in all the plans. In a highly explicit manner, neo-liberal ideologies are presented as the perfect prescription for all the malfunctions of education systems.

6.2.1 Education for Human Resources Development

Most plans commenced with the ‘taken for granted’ or ‘non-challengeable’ relationship between education and development as well as the indispensable contribution of the human factor to this development. Consequently, this human factor has to be appropriately ‘prepared’ to best carry out this task through qualifying education and training programs. Even though education is acknowledged as a human right in all the documents, its role in developing the needed human resources in many instances seemed radical to legitimize the provision of education by the state.

An integral part of all the documents is the assertion of the role of education in shaping, equipping or qualifying the country’s manpower to act as productive human resources in its economic development. Jordan’s education plan is even called the ‘National Strategy for Human Resources Development’ and was initiated pursuant to a letter from King Abdalla II:

Our belief that the Jordanian citizen is the centre of our development process remains constant. Hence, our keenness is to invest in our citizens’ education and training to create a generation of forward-looking young people, who are equipped with the skills necessary to analyse, innovate and excel. Ultimately, we seek a generation of youth aware of their rights and responsibilities as well as eager to contribute positively towards their country’s economic, social and political development (King Abdalla II, NHRDS Jordan, p. 4).

Though most plans do acknowledge other roles of education, education’s role as a tool for human resources development is the most prominent.

The essence of Ministry of Education (MoE) vision revolves around the provision of human resources, enjoying an increasing capacity and efficiency as well as the highest degree of quality and professional ethics, aiming at building learning –based society and knowledge-based economy (SPPE Egypt, p. 2).

Economic development is measured today by the degree of qualification, and skill of the human resource. The increasing importance of knowledge and the fast developments in science and technology require qualified human resources able to cope with such changes (DS Tunisia, p. 126).
The relationship between education and employability is also commonly evident in the documents. Education is assumed to increase the chances of employability, hence benefiting the individual on the one side and the supplying the labor market with its needed manpower on the other. Provision of graduates that match labor market requirements is considered in these plans to be a responsibility of the education system and appears in all the sampled countries to be a weakness of their current education systems, especially at the vocational and tertiary levels.

This strategy aims at activating the dynamic relationship between the educational process and the labor market’s requirements through graduating students that are able to seize market opportunities and even create such opportunities in order to achieve sustainable economic development that is based on knowledge and innovation (SDS Egypt, p. 204).

Education’s effect on other spheres of human life is also acknowledged in the educational plans of the four countries, with Qatar’s plans showing greater emphasis on the holistic gains of education than the other countries’ plans. Education for economic development was seldom mentioned in Qatar’s plans without the other individual, societal and cultural benefits stated with the same, if not a higher, level of significance.

To succeed in that global marketplace, Qatar will need to continue to make substantial investments in education and training, which will produce well rounded and engaged citizens who are prepared to support the nation’s industry, science and medicine, but which will develop a more cohesive population that is better equipped to make decisions about health, marriage, parenting and social responsibilities (ETSS Qatar, p. 6).

Beyond preparing citizens to be part of the country’s economic engine, education and training offer multiple benefits to society (NDS Qatar, p. 13).

6.2.2 Privatization

Privatization or private sector involvement in education is highly encouraged in the education and national plans of Egypt, Jordan and Qatar but less evident in those of Tunisia. However, the how and the why of privatization have different dispositions in the different plans. Private sector involvement is encouraged through different forms and to serve different purposes. In Egypt, for example, private sector involvement is urged under the umbrella of “corporate social responsibility” to provide material support for schools, especially in disadvantaged
areas (SDS, p. 182, 197), while in Jordan, public-private partnerships are highly emphasized and encouraged. The following table summarizes some of the main justifications for the encouragement of private sector expansion categorized by country.

<table>
<thead>
<tr>
<th>Table 6.3 Justifications for Privatization by Country</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Egypt</strong></td>
</tr>
<tr>
<td>Create additional capacity</td>
</tr>
<tr>
<td>Fill gap in public provision</td>
</tr>
<tr>
<td>Enhance quality</td>
</tr>
<tr>
<td>Choice</td>
</tr>
<tr>
<td>Inclusiveness</td>
</tr>
<tr>
<td>Performance management</td>
</tr>
<tr>
<td>Enhance Innovation</td>
</tr>
<tr>
<td>Enhance competition</td>
</tr>
</tbody>
</table>

For Egypt and Jordan, it is an important factor that the private sector alleviates some of the burden of educational provision borne by the public sector, by investing in infrastructures to increase capacity or filling gaps that the public sector is unable to support. This includes provision of early childhood education and provision of education in disadvantaged areas. For a more affluent country like Qatar, privatization and the variety it creates on the supply side of educational provision, stimulates innovation, competition and a wider choice for parents, which ultimately drives overall quality in terms of student outcomes (NDS Qatar, p. 7, 14).

### 6.2.3 Decentralization

Decentralization, as a concept, is overtly used in the documents as a strategy of good governance. It is mostly used on its own, without much detail on what should be decentralized, how and why. Looking at the plans’ detailed targets, it becomes clear that the term is used to refer to two things: 1) more autonomy in school management and less centralized control over budgetary and management issues and 2) more community based or democratic decision making.
In Egypt, decentralization is used to refer to measures like allowing schools to “use school fees, apply funding formulas, provide school meals and carry out maintenance operations” (SPPE, p. 43) or “emphasizing the active participation of the family and community support through the establishment of boards of trustees for the teaching and learning processes” (SPPE, p. 51). It is also referred to as school-based management (SBM) where a school is given the autonomy for self-management as an independent unit. Decentralization is also used to refer to devolvement of educational budgets from ministries to municipalities (SDS, p. 183). This is believed to improve the quality of education, increase efficiency resulting from better coordination, communication and resource management and facilitate accountability.

Similarly, in Jordan it is encouraged to allow “the MoE to focus on policy development while Field Directorates manage operations in the field and support school evaluation and self-improvement” (NHRDS, p. 125) and to “devolve more responsibilities to the Field Directorate and school level” (p. 109). In Tunisia and Qatar, the term is more loosely used to refer to shared decision making that would lead to ‘improvement from within’. An Independent Schools project in Qatar allows schools that are publicly financed to be independently managed (NDS, p. 123). Tunisia’ national development plan highly encourages democratic participatory decision making as an element of good governance (DS, p. 60).

6.2.4 Performance Management Systems

An important concept in the neo-liberal thought is that of performance management. In a systems approach, it refers to managing inputs and processes to end up with the desired output in the most effective and efficient way. According to neo-liberal thought, this can be applied to everything, including education. Applying this concept to education entails defining what the desired outputs are and in what ways can they be measured or evaluated. Measurement of educational output is closely linked to the idea of quality education that is demanded by recent international convention. It is also important to identify who will be held accountable in case such desired outputs are not realized.

Establishing performance management systems in education is perhaps the most notable fingerprint of neo-liberal ideology in the plans investigated in this study. Much emphasis is placed on the different elements of performance management such as use of standards, focusing on results and their measurement and accountability. These elements lack precise definitions and may be used inter-changeably, which makes looking at them independently
quite an impossible task. Rather, it is much more useful to look at them as parts of a whole ideology where a focus on outcomes requires standardization, monitoring and evaluation, and accountability.

The need for assuring quality in education is portrayed in the plans of the four countries through several action steps that should be met to achieve the quality education target. These steps include

1) The establishment of quality standards – which can be curriculum standards, professional standards for teachers and principals, school infrastructure, facilities, etc.

   Set policies to improve the quality of outputs and operations through developing standards (SDS Egypt, p. 184).

   The reform also addressed teacher and leadership quality by establishing professional standards and professional licenses for teachers based on these standards. Curriculum standards that address both academic and non-academic dimensions of learning were also established under the reform, to ensure the promotion of well-rounded citizens (NDS Qatar, p. 7).

2) The establishment of monitoring, inspection, evaluation bodies whose function is to assure adherence to the standards

   Delivery must be overseen by independent regulatory bodies to assure standards and quality, as well as motivate professional development of staff through systematic licensing and re-licensing schemes (NHRDS Jordan, p. 22).

   An independent authority for quality and accreditation will be developed (DS Tunisia, p. 127).

3) The enforcement of these standards through mandatory licensing and accreditation processes – for teachers, principals, schools, etc.

   Establish an accreditation system where teachers and caregivers are required to have a valid license in order to practice (NHRDS Jordan, p. 84).

4) Accountability measures – To offset the common challenge of lack of accountability structures that resulted from the high centralization in the education systems.

5) A focus on student outcomes rather than operational inputs
Dependence of current quality systems on operations, such as student density in classrooms or number of teachers relative to students, and ignoring output quality at the student’s level, such as success rates (SDS Egypt, p. 181).

6.3 Global Educational Themes

Global educational themes encompass wide-spread terms or vocabulary that is common in education rhetoric. These terms appear in all educational and development plans despite the fact that they are understood in various ways (Jacobi, 2012b) and even at times, it seems that their use is for the sole reason of ‘sounding’ right. Three of these global themes are evident in the plans studied: the knowledge economy, life-long learning and skills-focused education.

6.3.1 The Knowledge Economy and Life-long Learning

The knowledge economy as a phrase appears in all the plans, however with varying intensities. In some plans like Egypt’s and Jordan’s, it appears as a mere phrase without additional description of what it is or what it entails (other than integration of technology in all spheres of life). In such cases, it appears as if it is a synonym of the ‘future’ where education and knowledge are inevitable. Often, it is merged with life-long learning in the same context where neither of them is clarified. In Jordan’s NHRDS, the knowledge economy appears only a few times in a context where education is expected to serve the needs of the knowledge economy (p. 92, 173, 175) although Jordan’s major education project with the World Bank is named Education for the Knowledge Economy.

Helping the learners to acquire the basic skills for a community of knowledge that is based on the concept of ongoing learning and the acquisition of the digital values of citizenship, along with emphasizing the concept of the development of knowledge in the curriculum system since it is the element that governs the future. (SPPE Egypt, p. 50).

The plans of Tunisia show a more detailed account of the knowledge economy where production and acquisition of knowledge are discussed in its White Book as mandatory requisites for sustainable development and competition in the global world (ERP Tunisia, p. 24). Similarly, Qatar’s plans show a high interest in participating in the knowledge economy to secure competitiveness in the global world and asserts its various efforts to assure this, including increased scientific research in its universities to produce knowledge (ETSS Qatar, p. 25).
Life-long learning appears at a similar stance as the knowledge economy phrase, with little detail on its meaning, despite including life-long learning structures as a target in all the plans. This is especially true for the plans of Egypt and Tunisia. In Jordan’s NHRDS, it appears to refer to appreciating the pursuit of learning throughout one’s life on one occasion (p. 54) and to “the idea of continuing professional and personal development (CPPD) after entering employment” on another (p. 148). The latter conception resonates with how life-long learning is interpreted in the plans of Qatar where it is used to refer to “individuals encouraged to acquire education and update their skills throughout their lives” (NDS Qatar, p. 13) and the government offering “incentives to employers and employees for lifelong learning through retraining” (p.16).

6.3.2 Skills-Focused Education

After presenting the knowledge economy requirements and the life-long learning principle as general guidelines of the desired content of education or in other words, what should be taught, the plans get more articulate and reference precise skills that ought to be attained through education. These are sometimes referred to as 21st century skills, knowledge economy skills or life skills. There exists a consensus in all the plans that improving standards and performance in science, mathematics, foreign languages, and information and communication technology is of utmost priority for developing education and assuring competitiveness in the knowledge economy, with ICT being the most referenced of them. In addition, other ‘soft’ skills like critical thinking, problem solving, research and analysis are also referenced.

6.4 Emphasis on Cultural / National Identity

National citizenship and identity have for long been basic parts of education in the Arab world where they are expected to be instilled through mass schooling systems. Even in the most recent plans, national and cultural identity remain to be focal areas. This is clear in Qatar’s development strategy that states that

While a large expatriate community broadens perspectives on other cultures and lifestyles, it also threatens traditional Qatari values founded in Arabic culture and Islam. For this reason, QNV 2030 specifies that education should contribute to “a solid grounding in Qatari moral and ethical values, traditions and cultural heritage (NDS Qatar, p. 129).
Even in countries like Egypt, Jordan and Tunisia, where the expatriate community does not constitute a considerable proportion, the role of education in enhancing national identity amidst the wave of globalization similarly persists.

*The school is entrusted by developing the Egyptian identity, feeling devoted to such a nation and identifying the citizen rights and duties towards such a generous nation (SPPE Egypt, p. 83).*

*Learners rooted in Arab Islamic identity and open to global values (ERP Tunisia, p. 109).*

*Enhance students’ sense of citizenship and duty to the State and Jordanian society (NHRDS Jordan, p. 199).*

**Summary of Findings**

The empirical findings of this study demonstrate that global influences are inherent to all the analyzed documents. The ‘external’ world in these documents encompasses binding *international conventions and declarations* that impact the identification of what is to be accomplished in education; *supranational organizations* that produce knowledge and provide technical and material assistance; *other countries and regions* that can be used to learn from and benchmark with; and *world-wide rankings* through indices and ILSAs that position education systems in comparison with the rest of the world.

Global influences are also evident in the documents’ presentation of good educational governance strategies. The neoliberal ideology regarding education as a tool for qualifying the *human capital* necessary for economic development is integral to all the plans. *Privatization* and *decentralization*, are presented as essential strategies that enhance the quality, effectiveness and efficiency of educational provisions. Appropriate *performance management* strategies are illustrated as requiring the identification of standards; the monitoring and reinforcement of these standards; the establishment of accountability structures and the focus on results or student outcomes.

In addition, findings reveal that the plans actively engage with the global discourse on lifelong learning and the preparation of learners for the knowledge economy. A focus on development of skills rather than route learning is planned, with ICT, mathematics and foreign languages being the core areas of concern. The plans have all emphasized the importance of preserving national identity and culture in the modern global world.
7 Discussion

This chapter provides a comparative analysis of the findings presented in the previous chapter and reflects on them in light of a combination of World Society theory and the GSAE. This analysis aims to answer the fourth research question concerning similarities and differences between the plans and the factors that may shape how ‘the global’ impacts education in the different contexts of Arab countries.

Findings of the study demonstrate both commonalities and differences across the documents. The following diagram illustrates the main convergence / divergence areas highlighted by the empirical findings of this study.

Figure 7.1 Convergence and divergence areas of global influence

- **Areas of Convergence**
  - Referencing Supranational Organizations as knowledge banks
  - Fostering Neoliberal Ideologies
  - Adopting a culture of measurement and comparison using global indices and ILSA results
  - Deploying global education rhetoric themes
  - Emphasis on national identity

- **Areas of Divergence**
  - Referencing international conventions
  - Bases for identifying education problems and issues
  - Cooperating directly with Supranational organizations
  - Expressing the predominant role for education
  - Choice of ‘non-local’ benchmarks
7.1 Areas of Convergence

Several common areas of global influence are evident in the plans of the four countries, the most salient of which being the referencing of knowledge and data originating from supranational organizations and the fostering of neo-liberal ideologies. In addition, the use of global education themes, indices and ILSAs and the emphasis on national identity and culture are similarly common.

Supranational organizations are referenced in all the plans as sources of knowledge or ‘knowledge banks’. All the plans refer to data originating from the World Bank, UNESCO and OECD, even for figures concerning local enrollments, staffing and literacy rates. Not only does such knowledge provide facts and figures, but it also defines best practices in education through the findings and recommendations of empirical research conducted by these organizations.

Similarly, neo-liberal ideologies, such as privatization, decentralization, standardization and accountability, are presented in all the plans as examples of good governance strategies. Establishment of standards in different areas of education as well as the establishment of licensing, monitoring, quality control and accreditation institutions is a recurring target across all the plans. Decentralizing management and formation of accountability structures are evident as well.

Though neo-liberal ideologies form a distinct category in this study, it is quite misleading to isolate them from the workings of supranational organizations that have for long promoted them as best practices. A considerable portion of the neo-liberal thought that is proposed in the plans is based on World Bank studies and recommendations.

A culture of measurement and comparison to other countries and regions is another commonality across the countries, even though the choice of benchmark countries and regions differs from one context to another. International indices and ILSAs are often used to measure performance and set numeric future development targets. Just like neo-liberal ideologies, these indices and ILSAs are not totally independent of supranational organizations either. PISA, the most widely used ILSA in the documents, is coordinated by the OECD and its results are highly sourced in the plans as measures of student and the education system’s performance level.
Another area of convergence is the use of global educational rhetoric themes such as the knowledge economy, life-long learning and skills based education. These have been highlighted in all the plans as concepts essential for educational reform and characteristics of successful systems. As discussed in the literature review chapter, these themes have been promoted by supranational organizations and commended in many of their publications and conventions.

The emphasis found in all the plans on education’s role in the enhancement of national identity and culture marks the final area of convergence. Carnoy (1999) considers the assertion of cultural values to be one way by which globalization has influenced education. He has attributed this to a fear of marginalization by some groups amidst the process of a transforming world culture. This is explicitly stated in Qatar’s plan, where a high percentage of expatriate population exists, but is not as clearly justified in the other plans.

7.2 Areas of Divergence

Though the plans depict several commonalities in their prevailing concepts and themes, a closer look highlights variation that may be of relative significance to understanding how global influences transform in different contexts and the factors that may affect such transformations. This variation does not only relate to individual local issues in education, but also to the larger context of how the country positions itself in relation to the ‘external’ world.

A preliminary area of divergence is the set of guiding legislations that form the overarching framework for the plans. Though all the plans state that their national constitutions are the starting overarching point, not all of them have stated local sources as the sole basis. Egypt, Jordan and Tunisia acknowledge international conventions such as those of child and human rights and international binding movements like the EFA and SDGs as being as significant as national constitutions and by-laws. Qatar, on the other hand has only mentioned its national constitution as the starting point for its concern with education.

The inclusion of international conventions and agreements as ‘guiding’ or ‘binding’ dictates, naturally influences the identification of educational problems and issues. Regional and national reports assessing the achievement of these agreements are used as bases for the identification of shortcomings in education systems and hence the formulation of reform targets. This is clear when looking at plans like those of Egypt, where figures pertaining to
out of school children and gender parity initiate targets and programs to ensure EFA is achieved. Similarly, the concern with ‘quality’ of education triggered the concern with performance management including measurement, standardization and accountability.

The nature of the relationship with supranational organizations depicted in the plans is another area of variation. While using information originating from supranational organizations has been acknowledged as an area of commonality, the extent of using such knowledge and the existence of other forms of cooperation are not homogenous across the plans. Egypt’s and Jordan’s plans state that technical and material assistance is provided by these organization, while Tunisian and Qatari plans do not mention such form of cooperation. Although the scope and degree of cooperation are not detailed in the plans, it may be well inferred that such assistance has influenced the content and structure of the plans. Jordan’s plans, for example, where the World Bank provides multiple forms of assistance, highly emphasize the concepts of privatization, standardization, performance management and the use of KPIs based on indices and ILSAs. The plans also use multiple World Bank studies in other parts of the world to seek comparable models to learn from. On the contrary, Egypt’s plans reflect more concern with educational provision in terms of access and quality than with performance management strategies. Tunisia and Qatar, where no mention of any kind of cooperation with supranational organizations is made, source supranational organizations to a very limited extent when compared to Egypt and Jordan.

Another element where differences can be marked is the way in which these plans have illustrated the role and value of education. While the Egyptian, Tunisian and Jordanian plans emphasize education’s contribution to economic development in every occasion where the role of education is discussed, the Qatari is more concerned with the diverse benefits that can be sought from educating its citizens.

An interesting observation of the way these plans are different, is their selection of countries or regions which they compare themselves to. While Egypt and Tunisia resort to ‘developed countries’ as a benchmark for their aspirations, Jordan and Qatar use more specific benchmarks from several developed countries and country groups. The ‘OECD average’ is commonly used in the four countries to benchmark PISA results but used by Jordan and Qatar for other areas as well. Jordan’s plans depict all types of comparisons and along with Qatar, reference several developed countries against which they position themselves.
7.3 Interpretation of the Convergence / Divergence Trends

The convergence and divergence tendencies illustrated in the preceding analysis pose several questions regarding the factors that may have led to such trends. Elements of both World Society theory and GSAE are used to interpret these findings and draw a rough illustration of the conditions leading to these diverse scenarios.

Qatar’s unique position in most of the categories analyzed in this study raises speculations about the relationship between such a ‘stand out’ position and its most prevailing characteristic of being a high-income country. Qatar does not mention in its plans references to international agreements or supranational organizations as guidance manuals or supporters of any kind, but rather its constitution and search for its citizens best interest. It highly emphasizes the overall development of its citizens through education and life-long learning. It also positions itself as able to compete in the knowledge economy and benchmarks mainly with OECD and other developed countries. Deployment of neo-liberal ideologies such as performance management and privatization are presented as rational decisions that work well as per worldwide experiences. Even in its justification of privatization, it uses a totally different set of justifications such as choice and inclusiveness, contrary to the other countries which emphasize the importance of the private sector’s contribution in filling the gaps in public provision.

This presentation of the interaction of the local and the global in Qatar’s documents, matches to a great extent, with World Society theory’s analysis where states adopt worldwide scripts for success as they participate in international exchange. Nation states in this theory are at par with each other, with an acknowledged degree of Western hegemony. In the case of Qatar, this situation may well be attributed to its abundant resources and affluent economy. The text in its plans implies that Qatar has independently decided to adopt specific strategies because they are the most rational to bring Qatar to be globally competitive and rank high in the international society.

This is contradictory to the other three countries where limited resources and the significance of the contribution of human resources to economic development are continuously acknowledged. Dependence on supranational organizations and other aid agencies for
material and technical support creates unequal grounds and influences multiple dimensions of educational reform plan. Such influence includes identification of local problems and how to best resolve them. As GSAE suggests, these organizations define education problems and propose solutions to them that come in ready-made ‘prescriptions’ or ‘recipes’, including concepts such as privatization, decentralization and accountability. Even in Tunisia, where no external support is stated in the plans, the problems and their proposed solutions are not very different from those of Egypt and Jordan. For these three contexts, the existence of a ‘structured agenda for education’ seems to better explain the convergence in their main education reform priorities and targets. This is further supported by international conventions and agreements that are made binding to all states and conformity to which is regarded as mandatory. Nevertheless, these solutions are presented to the public as ‘rational’ decisions that emerge from science based world experiences.

Contrary to GSAE however, the imbalance of power created by the provision of material and technical support, does not indicate a ceding of state power to supranational forces, at least superficially. The existence of divergence across the plans supports this claim. It seems apparent that, even in the presence of external pressures, a dialectic process of selection and adaptation takes place. Different emphasis is given to different priority areas in each plan, indicating an observation of local contexts. This asserts the agency of the nation state in responding to such global influences, though it does not guarantee total voluntariness in their adoption. It must be acknowledged however, that it is difficult to judge from a document analysis on how such processes work in reality.

Similarly, the recurring emphasis on national identity and culture in the plans of the four countries contradicts the idea that global influences emphasize economic development and competition rather than nationalist projects. These plans have autonomously chosen to emphasize national identity and culture to imply the grounding of the plans in national context and sovereignty or any other local social or political motives. Hence GSAE’s idea of ceding powers of the state is relatively challenged in the context of this study.

Another important factor that shapes global influences on educational plans is the nature of the relationship between the context of study and supranational organizations. Seemingly, the closer a supranational organization works with a local system, the more likely it is that the system is highly influenced by the organization’s ideologies and work style. The World
Bank’s work with Jordanian education is highly reflected in the content and structure of its plans and the same goes for UNESCO’s work in Egypt.

To sum it up, it seems apparent from analyzing the findings of this study, that the convergence trends across the plans may be attributed to both a world culture and a structured agenda for education while the divergence trends may be attributed to: 1) the economic and developmental standing of the context and 2) its relationship with supranational organizations. Countries like Qatar with high economic status and income levels position themselves in line with the world society as autonomous rational actors, selecting practices that conform with successful world models. However, countries with more modest economic settings conform to the structured agenda posed by supranational institutions that provide them with assistance to reform their education, while retaining much of their agency and power to select and choose. Under both scenarios, supranational actors shape education strategies and reform programs, with political economy of each context identifying the individual actors.

7.4 Final Considerations

This study is an exploratory study and aims at highlighting general themes and speculations about global influences in the Arab world. It is not intended, given its scope and limits, to give detailed accounts of how global influences affect education in these countries. The preceding analysis of global influences on the educational plans and the claims made about the factors that may influence them have several limitations.

First and foremost, it must be acknowledged that this analysis and the inferences drawn from it are bound to the documents used in this study and cannot be considered generalizations that can be applied outside the context of this study. Second, the attempts made to define what may be considered ‘global influence’ remain, to a large degree, uncertain without further research into the actors and processes involved. Similarly, the inferences made are very limited given that they are based solely on the contents of these documents of intended action without the support of data about implementation and impact. It is possible that significant data relating to global influence exists in reality but, for one reason or the other, is not stated in the plans. And the opposite is true. The difference between rhetoric and reality may greatly challenge the findings of this study.
8 Conclusion

Emerging from a limited body of literature on the topic and an interest to uncover the workings of globalization in the Arab world, this exploratory study attempted to highlight areas of global influence on education in a sample of four Arab countries. This was done through a document analysis of the educational plans of Egypt, Jordan, Qatar and Tunisia. The aim was to investigate 1) the ways by which the world external to the states’ boundaries is referenced, 2) the main globalization-related ideologies and themes illustrated in the plans and 3) how the plans compare to each other and what this may infer. Drawing on the study’s findings and analysis, this chapter revisits the findings for each research question; reflects on them and presents recommendations for future research.

Reflections on the Research Findings

RQ1: How and for what purposes do pre-tertiary education plans in the sampled countries reference the world external to their national borders?

Findings of the study reveal that education plans in the sampled countries reference the external world through the referencing of international conventions and agreements, supranational organizations and other countries and regions. International conventions, such as the conventions of Human and Child Rights and EFA, are referenced as both binding agreements that nation states must conform to, and general frameworks guiding the planning of education. Supranational organizations are highly referenced as knowledge sources, in addition to being referenced as direct providers of material and technical support to some countries. Regional and cross-country comparisons are commonly used to evaluate a system’s status quo and identify models where lessons can be learnt for local reform.

These findings conform to Popkewitz’s (2004) argument that foreign or global policies are typically used to legitimize local policies. Whether framed as obligatory commitments; rational decisions to conform to best practices; or indicators of world situations, these foreign references and comparisons are illustrated as standard policy instruments (Steiner-Khamsi, 2004) to justify, ground and give credibility to what is being done locally. This constant need for assuring convergence with global trends reflects the high interconnectedness of today’s world and the impossibility of isolation from it.
RQ2: How do these plans depict the role(s) that supranational organizations play?

Supranational organizations play diverse roles as demonstrated in the studied plans, the most prominent of which is their role as providers of knowledge or ‘knowledge banks’. Data, facts and figures as well as literature and empirical research on best practices in education are widely sourced from the World Bank, UNESCO, UNICEF and OECD. Knowledge from these sources is hegemonic over any other source. OECD statistics on its member states are widely used for benchmarking purposes, especially by high income countries. Coordination of ILSAs such as the PISA test is also a function of these organizations. Results of ILSAs are commonly used to benchmark student performance and evaluate education systems outcomes in addition to international indices such as the Human Development Index developed by the UNDP. Through these diverse roles, supranational organizations contribute to the identification of educational problems and priorities and the proposed solutions to them. This is further enhanced by their role as promoters of neo-liberal ideologies and global education themes through their studies and local projects.

These diverse and multifaceted roles of supranational organizations signal their increasing power in directing local policy and practice. Contrary to the traditional pathways of using financial aid and direct assistance to channel global influence, the use of knowledge has manifested itself as the most influential pathway that is currently being used. Given the immense efforts that these organizations put into producing and disseminating knowledge, it seems unlikely that this power will regress in the near future.

This, however, poses questions concerning the creation of new forms of dependency in the world. The noticeable dependence on knowledge from these organizations generates speculations about the capacity of Arab countries to ‘compete in the knowledge economy’ as they presumably target. All the plans have emphasized the importance of knowledge production to compete in the knowledge economy, nevertheless, they are dependent on external producers of knowledge even for local statistics and performance measures. This is a topic that has to be addressed on the local level if Arab countries are to prepare for competition in the ‘knowledge economy’. Samoff describes this impact of supranational organizations by arguing that “though they talk about capacity building, far too often, they are incapacitating” (2013, p. 81).
RQ3: What ‘global’ concepts and themes are emphasized in these plans?

The study findings highlight the high emphasis on neoliberal ideologies as strategies of good governance. These include privatization, decentralization and performance management fundamentals of standardization, monitoring and evaluation and accountability structures. These fundamentals have enhanced a culture of measurement to evaluate quality performance. In addition to those, global education themes of education for the knowledge economy, life-long learning and education that focuses on mathematics, science, ICT and 21st century skills have also been emphasized in the plans.

As in the use of external references to legitimize local policies, the plans depict an engagement with the global educational rhetoric. World-famous vocabulary such as life-long learning, education for the knowledge economy, new public management, school based management and 21st century skills adds to the credibility of the plans because it ‘sounds right’. A minimal account is given of what these terms constitute or how they will be implemented. Nevertheless, they had to be well acknowledged, simply because this is what the current international educational discourse is about.

RQ4: In what ways are the plans similar to/different from each other and what possible factors may be influencing such convergence / divergence?

Comparing the plans to each other, convergence is seen in referencing supranational organizations as sources of knowledge, adopting neoliberal ideologies and global themes of education as well as emphasis on national identity and culture. Divergence is also evident across the documents in several areas. Not all the plans referenced international conventions as overarching frameworks. Similarly, the nature of cooperation between supranational organizations and individual states varied. Emphasis on the role of education in economic development was also more evident in low-income countries than high-income ones.

The convergence patterns of global influence support the proposition that global influence is initiated by external global actors. The prevalence of the neo-liberal ideologies of privatization, decentralization and performance management and the recurrence of the need for measuring performance via ILSAs and indices evidence this proposition. Divergence patterns, on the other hand, are attributed mainly to each country’s political economy and its relationship with supranational organizations. Plans of countries with higher resources and
less dependence on external aid and support, position themselves as independent rational actors and center their focus on the well-rounded development of their citizens through education. Less resourceful countries, and recipients of support from external sources reference international conventions and agreements as binding commitments and use them to identify education reform targets. It is apparent that working closely with these organizations leads to their significant fingerprint on reform priorities and strategies.

As in many empirical studies on this topic, this study has supported the claim that globalization, while having multiple effects on educational policy and practice, has not deprived nation states of their power to control local practices. The divergence trends evident in this study confirm that the dialectic between the global and the local is constantly at work.

In addition, this study draws attention to the need to move beyond the conceptions of global influences as being examples of a world culture or a structured agenda. The non-binding yet remarkably influential hegemony of knowledge is having a totally different kind of influence. Nation states are voluntarily choosing to engage with the global agenda, however for reasons other than a world culture or a structured agenda. They engage because they know less whereas the global know more.

**Recommendations for Future Research**

This study explored the ways in which globalization influences education in Arab countries through studying a sample of their educational plans. Studying the plans was an initial step whose purpose was to highlight the main actors and categories of influence and trigger directions for further research. However, much more needs to be investigated to shed light on this process.

First, it is essential to incorporate the different actors involved in producing these plans in the study to get a more holistic picture of the process by which these plans evolved. Investigation of how the documents originated and for what reasons, who participated in preparing them and who finally owns them enhances the understanding of such documents. Furthermore, the nature of interaction and the extent of cooperation between the local and the non-local actors can add more knowledge about power relations that determine identification of problems, solutions, reform targets and most importantly, the degree of voluntariness in the adoption of these imported reform packages. Identifying the reasons why certain policies are adopted or
selected and not others can reflect on the mechanism (Dale, 2007) by which the external affects national policies. A study involving interviews with government officials in the ministries of education, participants in the preparation of those plans and supranational organization representatives in addition to document analysis of related documents would further the depth of knowledge about the topic.

Another direction which can extend knowledge in this area is studying the rhetoric-reality relationship. A study investigating the implementation of the global influences depicted in the plans in reality would illustrate if Ball’s argument that in order to face the challenges posed by globalization’s influence on education, many governments have resorted to employing ‘policy dualism’ linking “individual, consumer choice in education markets with rhetoric and policies aimed at furthering national economic interests” (1998, p. 122). This study will demonstrate if the plans are set to be implemented or they are set to attain other goals and hence their value as evidence of global influence in general. Such a study will require examining how the concepts reflecting global influences are understood in each context, followed by a study of their implementation in reality.”
References


Robertson S.L. (2005) Re-imagining and re-scripting the future of education: global knowledge economy discourses and the challenge to education systems, Comparative Education, 41:2, 151-170, DOI: 10.1080/03050060500150922


Strategic Plan for Pre-University Education. (n.d.). Retrieved from http://www.unesco.org/education/edurights/media/docs/c33b72f4c03c58424c5ff258cc6aae0eb58de4.pdf


World Bank (n.d.d) Tunisia Overview. Retrieved April 23, 2018 from

World Bank (n.d.e) Egypt Overview. Retrieved April 23, 2018 from
http://www.worldbank.org/en/country/egypt/overview#1

World Bank (n.d.f) Qatar. Retrieved April 23, 2018 from

World Bank (n.d.g). Jordan Overview. Retrieved April 24, 2018 from

World Bank (n.d.h). Jordan Overview 2. Retrieved April 24, 2018 from

Thousand Oaks, Calif: Sage
## Appendices

### Appendix 1

### Arab World Educational Plans Online Availability as on Dec-11-2017

<table>
<thead>
<tr>
<th>Country</th>
<th>National Education Plan</th>
<th>Strategic Plan – Mother plan</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Algeria</td>
<td>Referenced in headings but document is NA</td>
</tr>
<tr>
<td>3</td>
<td>Comoros</td>
<td>IMF / UNICEF programs Grant from GPE UNICEF as coordinator</td>
</tr>
<tr>
<td></td>
<td></td>
<td><a href="https://www.globalpartnership.org/country/comoros">https://www.globalpartnership.org/country/comoros</a></td>
</tr>
<tr>
<td>4</td>
<td>Djibouti</td>
<td>Grant for developing plan from GPE UNICEF as coordinator</td>
</tr>
<tr>
<td></td>
<td></td>
<td><a href="https://www.globalpartnership.org/country/djibouti">https://www.globalpartnership.org/country/djibouti</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Iraq</td>
<td>Referenced but not found online</td>
</tr>
<tr>
<td>7</td>
<td>Jordan</td>
<td>JORDAN 2025</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>Country</td>
<td>Status</td>
</tr>
<tr>
<td>-----</td>
<td>----------</td>
<td>--------</td>
</tr>
<tr>
<td>10</td>
<td>Libya</td>
<td>NA</td>
</tr>
<tr>
<td>No.</td>
<td>Country</td>
<td>Education Plan/Strategy Details</td>
</tr>
<tr>
<td>-----</td>
<td>------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>16</td>
<td>Saudi Arabia</td>
<td>In process No independent plan yet. Use goals in vision 2030</td>
</tr>
<tr>
<td>17</td>
<td>Somalia</td>
<td>Education Sector Strategic Plan 2012-2016 English</td>
</tr>
<tr>
<td>18</td>
<td>Sudan</td>
<td>Interim Education Sector Strategic Plan 2012-2016 English</td>
</tr>
<tr>
<td>19</td>
<td>Syria</td>
<td>NA</td>
</tr>
</tbody>
</table>

**Notes:**
- **Qatar National Vision 2030**
- **Vision 2030**
- **Grant from GPE**
- **Development Strategy 2016-2020**
- **Abu Dhabi Economic Vision 2030**

---

**Links:**
- www.edu.gov.qa
- www.globalpartnership.org
- https://www.abudhabi.ae
- www.mehat.gov.tn
- www.mdici.gov.tn

---

**References:**
- Qatar National Vision 2030
- www.globalpartnership.org/country/somalia
- https://www.globalpartnership.org/country/sudan
- https://www.abudhabi.ae/cs/groups/public/documents/publication/mtmx/nj
Yemen

Education Sector Plan 2013-2015

Grant from GPE

Conflict / crisis area


NA

Keywords (Arabic – English): Education plan, education strategy, education development plan, development vision, strategic vision, education reform plan

Websites searched: Ministry of education, Ministry of Planning, Ministry of Higher Ed and Research
Appendix 2

Data Analysis Categorization Scheme

<table>
<thead>
<tr>
<th>Category</th>
<th>Sub-Category</th>
<th>Sub-subcategory</th>
<th>Keyword(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Externalization</td>
<td>a. International Agreements</td>
<td></td>
<td>i. Sources of Knowledge</td>
</tr>
<tr>
<td>Units of analysis that express any</td>
<td>Units of analysis that mention exact names of international agreements and</td>
<td></td>
<td>Units of analysis that mention exact names of international organizations as being providers of knowledge (sources of data, research results, education building etc)</td>
</tr>
<tr>
<td>reference to the world external to</td>
<td>conventions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>the country’s borders</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. International Organizations / Aid Agencies</td>
<td></td>
<td>ii. Providers of Material / Technical Support</td>
</tr>
<tr>
<td></td>
<td>Units of analysis that mention exact names of international organizations</td>
<td></td>
<td>Units of analysis that mention exact names of international organizations as being providers of funding, technical assistance, project partners, etc</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. References made to other countries / regions of the world</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Units of analysis that make direct references to specific countries /</td>
<td></td>
<td>i. For benchmarking purposes</td>
</tr>
<tr>
<td></td>
<td>regions / groups of countries</td>
<td></td>
<td>Units of analysis where other countries / regions are mentioned just for the purpose of benchmarking and comparison</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Note: References to the ‘global’ / ‘international’ / ‘other’</td>
<td></td>
<td>ii. For cooperation and policy learning purposes</td>
</tr>
</tbody>
</table>

99
countries’ are not included in this subcategory

<table>
<thead>
<tr>
<th>Units of analysis where other countries / regions are mentioned for the purpose of learning from them or cooperating with them in a project / initiative</th>
</tr>
</thead>
<tbody>
<tr>
<td>d. World-Wide Comparisons</td>
</tr>
<tr>
<td>Units of analysis that refer to world-wide benchmarks / standards / competition</td>
</tr>
<tr>
<td>i. Use of Global Indices</td>
</tr>
<tr>
<td>Units of analysis where world-wide comparisons are made through the use of indices such as HDI / GCI</td>
</tr>
<tr>
<td>ii. Use of ILSAs</td>
</tr>
<tr>
<td>Units of analysis where world-wide comparisons are made through the use of ILSAs results such as PISA / TIMSS/PIRLS</td>
</tr>
<tr>
<td>iii. World-wide comparisons with undefined criteria</td>
</tr>
<tr>
<td>Units of analysis that use ‘global’ and ‘international’ to set standards and benchmarks without defining any criteria / tools for the comparison</td>
</tr>
<tr>
<td>International standards / global levels /</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Neo-Liberal Ideologies</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Education for HRD</td>
</tr>
<tr>
<td>Units of analysis that refer to Education as a means for employment and hence economic development</td>
</tr>
<tr>
<td>Human capital – human resources – labor market – job opportunities – workforce – supply and demand for skills</td>
</tr>
<tr>
<td>b. Privatization</td>
</tr>
<tr>
<td>Units of analysis that refer to the involvement of the private sector in education</td>
</tr>
<tr>
<td>Privatization – private sector – private provision – public-private partnerships (PPPs)</td>
</tr>
<tr>
<td>c. Decentralization</td>
</tr>
<tr>
<td>Units of analysis that refer to devolvement of responsibilities /</td>
</tr>
<tr>
<td>Decentralization – school based management – board of trustees</td>
</tr>
<tr>
<td><strong>authorities to lower levels</strong></td>
</tr>
<tr>
<td>--------------------------------</td>
</tr>
<tr>
<td>d. Performance Management System</td>
</tr>
<tr>
<td>Units of analysis that refer to the Overlapping categories of</td>
</tr>
<tr>
<td>- Use of standards</td>
</tr>
<tr>
<td>- Measurement of Outcomes</td>
</tr>
<tr>
<td>- Accountability</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Global Themes</strong></th>
<th><strong>a. Knowledge Economy</strong></th>
<th>Knowledge production – K, Economy</th>
</tr>
</thead>
<tbody>
<tr>
<td>b. Life-long learning</td>
<td>LLL – continued professional development</td>
<td></td>
</tr>
</tbody>
</table>

| **Emphasis on National / Cultural Identity** | National / local culture / sovereignty / values / identity |