

EGYPT

COUNTRY STRATEGY PAPER 2017-20

2018 UPDATES



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A. COUNTRY CONTEXT

Egypt is a lower middle-income country with a population estimated at 91 million in 2015¹. This is due to a recent increase in fertility rates that had been in decline between the mid-nineties to 2007, but have since risen reaching 3.3 in 2015. This change in the trend implies that the **demographic pressure** remains high, and may even increase if the current trend continues. In 2015, the United Nations Development Programme estimated the population at 33% for children under 14 and 17% for the age bracket 15-24 years. This situation demands significant investment in education, health, employment, housing and infrastructure. Because of the youth bulge, some 800000 job seekers enter the labour market each year.²

In this context, emigration in search of work is a significant factor. According to the Egyptian consular statistics, there were 6.5 million Egyptians working abroad in 2009. Egyptian migration is currently experiencing a phenomenon that has been called 'the permanence of temporary migration', whereby migration to Arab countries is becoming less temporary. Egypt is also host to modest numbers of immigrant workers and a growing number of refugees and asylum seekers.³ Emigrants from Egypt are both highly skilled and unskilled, with more fitting the latter profile, while immigrants into the country are primarily low skilled.

The Egyptian economy still has a strong agricultural sector, contributing to 11% of gross domestic product (GDP), although this is declining, while industry generates one third and services one-half of the GDP. The employment structure shows the labour intensity of the agricultural sector (mainly subsistence agriculture). In total, 28% of total employment is in agriculture, 25% in industry and the remaining 48% in services. The economy has been under continuous pressure due to the turbulent political transition process. The GDP growth rate fell from between 4% and 5% in 2009-2010 to 1.8% in 2011 and then increased slightly to 2.2% between 2012 and 2014. Recently GDP growth has risen above 4.2% (World Bank, 2015), which is still lower than pre-revolution levels. In this climate, the country has been unable to generate sufficient employment to meet the needs of all job seekers. Both foreign and local demand has declined because of the economic slowdown, lower production, and outward investment flows. The Egyptian economy relies on revenues from services exports and tourism to maintain its foreign currency reserves, and both of these sectors, especially tourism, have been severely affected by the instability in the country. The unstable situation has contributed to a dramatic increase in inflation, which has led to a rise in production costs.

The political situation appeared to stabilise following the election of President Al Sisi. However, the situation became more unstable in 2015 with a growing opposition movement as well as growing regional instability, which led to the imposition of stricter security measures. Several changes of government have taken place, with re-shuffles of several sectors at several times, including for education. The unstable political situation has not supported cooperation among stakeholders, and has increased fragmentation within key sectors (including the technical vocational education and training (TVET) sector). Reform initiatives are high on the political agenda but continuous rotations at high policy levels precludes a steady reform process and hinders implementation.

¹ UNDP data, estimations at first of July 2015; 87.9 million according to CAPMAS' estimations at first of January 2015. Other demographic data shown in this analysis is from UNDP, the 2015 revision.

² World Bank, World Development Indicators.

³ EU Neighbourhood Migration Report, 2013 – Migration Policy Centre

The Egyptian workforce is very low skilled⁴. Around 40% of the population did not attend any school and 14% attained tertiary education (Eurostat, 2014). However, the situation has continuously improved in recent years, and the literacy rates of adults, and particularly of youth, are showing very positive trends. The difference in literacy between male and female adults is still significant, but has been considerably reduced⁵. In addition, the proportion of adults that have attained medium level of education (ISCED 3-4) increased by 4% in 5 years reaching 30.5% in 2014 (Eurostat).

One consequence of the upskilled workforce is the increased unemployment rate for those with higher education. There is an inverse correlation in Egypt between the education of the workforce and the unemployment rate, which for higher educated (ISCED 3 and 4) reached 20% in 2014 while it is only 6% for the illiterate; 10% for lower secondary graduates (ISCED 2); and 16% for upper and post-secondary graduates (ISCED 3-4). This is a trend across the entire region, with the labour market unable to create sufficient skilled jobs, and skilled workers likely to accept jobs below their qualification.

The number of students that go to vocational education and training (VET) (ISCED 3 and 4) has remained stable in recent years, but due to the continuously increasing numbers of young people entering education, the percentage of VET has decreased compared to those in general education. This decrease has reached 7 percentage points in only six years (from 53.2% in 2009 to 46.6% in 2015), contributing to both the decreasing attractiveness of VET among youth and increasing willingness to attend higher education.

Relations between the EU and Egypt have been on a firm legal basis since 2001, when negotiations for an Association Agreement concluded. This entered into force in 2004, establishing a free-trade area for industrial products and significant concessions on agricultural products. The relationship has been further strengthened through the EU-Egypt Action Plan which was adopted in 2007 and which provides the basis for cooperation in political, social and economic fields.

Regarding cooperation, the EU Single Support Framework 2014-2016 for Egypt, includes the following three priorities areas with an indicative allocation of EUR 311 – 380 million:

- Governance, transparency and business environment (including complementary support in favour of civil society and of EU agreements),
- Poverty alleviation, local socio-economic development and social protection,
- Quality of life and environment.

B. VET AND SKILLS IN THE COUNTRY: OVERVIEW, PROGRESS AND MID-TERM PRIORITIES

In the last few years, the country has been facing a transitional period of political, economic and social instability. Great expectations by youth and other parts of the society have put unprecedented demand on the government to tackle unemployment and to move towards a more transparent and democratic

⁴ Educational attainment is frequently used as a proxy measure of the skills associated with a given level of education and available in the population, and to the labour force. Higher levels of educational attainment are associated with several positive individual and social outcomes (see also OECD *Education at a Glance*, 2015)

⁵ In 2005 the literacy rate (data from UIS) among male adults (25-64) was 80.1% while for females reached 54.1%; in 2015 the rate 80.4 and 61.1% respectively. Similar trend is found for youth, but with a better improvement also for males: 90.1 rate for males vs 78.9 for females in 2005, and 93.3 for males and 92.1 for females in 2015.

society. This has created additional pressure to the reform of the education and TVET system. However, progress in TVET reform has remained modest and slow. The highly volatile environment and unique circumstances in this period explain a large part of this. There are, however, other factors, such as the limited cooperation and coordination among key stakeholders, which has resulted in no unified and agreed vision on TVET, which has meant that progress in reforms fell behind expectations.

Between the end of 2014 and 2015 signs of acceleration of TVET, reform became evident as a number of important policy decisions were taken or announced. The most notable developments concerned the area of governance:

- Re-shaping the governance structure of TVET through the adoption of a system of cascading councils, including structures at regional level;
- Creation of the position of a Deputy Minister for Technical Education as a precursor towards the possible establishment of a separate TVET Ministry and upgrading TVET to the level of the Constitution;
- Restructuring the Ministry of Education, including the establishment of a school-to-work-transition unit and a planning and co-ordination unit in the TVET sector.

The reform initiatives undertaken in recent years also included the creation of a separate Ministry for Technical Education and Training. However, this was dismantled within a short time, with responsibilities for TVET returning to the Ministry of Education. The creation of the Ministry of Technical Education and Training was an attempt to provide an answer to fragmentation in TVET (centralisation of processes and institutions under the responsibility of different stakeholders). When the Ministry of TVET was dismantled, its functions returned to the original stakeholders. Following an initial slow-down in the reform process, the deputy Minister for Technical Education set up an ambitious reform plan, including informal donor coordination meetings.

Over the years the Torino Process has allowed the identification **of priorities for TVET reform**. The priorities have been confirmed by the Torino Process 2016 report. The first priority to be addressed is the definition of a vision and strategy agreed by all key stakeholders. The strategy should help review the currently very fragmented governance model. Several documents have been written under the leadership of different projects and different international actors. Until now, none of these attempts has been recognised unanimously as the TVET strategy for Egypt. The biggest challenge is the tendency of the different stakeholders to work alone within the context of different projects, unwilling to involve other stakeholders in their projects or to be involved in some other stakeholders' initiatives.

The second priority is the definition of standard processes for qualifications development (NQF, occupational standards, curriculum development etc.) which would reduce the gap between the needs of the labour market and the outputs of the technical and vocational education. Until now, different stakeholders have developed competence-based programmes in the framework of international projects. However, these initiatives have been based on different methodologies and no national standard process has been developed and approved.

The third priority is the reinforcement of current **work-based learning** initiatives and the establishment of new innovative initiatives. It is clear that the Egyptian TVET system does not have the resources to keep TVET providers up-to-date with modern technologies in many sectors. Involving the private sector in TVET provision would help address this challenge, and at the same time increase responsiveness to labour market needs. In this context, in addition to reinforcing the most recent work-based learning initiatives (e.g. Mubarak-Kohl initiative), it would be worthwhile to review other Egyptian home-grown models, such as productive schools and factories inside schools. These models are already operating at systemic level and therefore are not in need scaling up and could be significantly improved in terms of pedagogical benefit for the students. However, this issue has not yet been

discussed with the Ministry and any discussions should be tackled in the framework of an overarching work-based learning policy and not as an ad hoc initiative.

C. EU AND OTHER DONORS SUPPORT IN VET AND SKILLS

TVET is specifically mentioned in the EU-Egypt Action Plan, with a focus on 'making it more responsive to market needs in the context of the Egyptian national educational standards'. Although not a key priority, TVET has benefited from very important support in recent years through large scale programmes (TVET 1 and TVET 2).

Indeed, the main international project supporting TVET reform is the **EU-funded TVET 2 programme**. This is a 117 million programme (50 million coming from the EU and 67 from the Egyptian government) aimed at systemic reform of the TVET sector. Following a standstill in its operationalisation, due to the instability in the country, the programme became operational in 2015 with the establishment of the project implementation unit (PIU) and the launch of terms of reference for the main activities. Implementation of activities started in 2016. The impresst administrator role is under the Ministry of Industry (having initially been under the dismantled Ministry of Technical education and training).

Technical and Vocational Training Reform in Egypt TVET Phase II – TVET II

The programme has three specific objectives:

- To put in place a rational streamlined governance of the TVET system with clear leadership, participation, partnerships and transparency
- To improve the quality of TVET offers to respond better to the labour market skills needs and private sector demand, starting from pilots focusing on selected key economic sectors (with particular emphasis on tourism) and extending actions to system level
- To increase the employability of Egyptian youth, jobseekers and workers, and the capacity of the TVET system to develop appropriate skills programmes to meet labour market demand with particular attention to selected economic sectors, notably tourism

The programme comprises three components (one per objective):

- Component 1: Improving the Governance of the Egyptian TVET system
- Component 2: Enhancing the relevance and quality of TVET
- Component 3: Transition to employment

TVET 2 is a decentralised programme where the Egyptian stakeholders have the leadership of the implementation through the PIU. The EU Delegation maintains formal control of procurement procedures but does not have any direct role in the implementation of the programme.

The second main international actor is Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ). In 2016, GIZ launched its new Employment Promotion Programme (10 million programme). The programme will have four components: evidence based policy making; labour market monitoring; career guidance – transition from school to work; and the dual system. A good dialogue has been established between the GIZ and EU programmes to identify complementarities, in particular, on issues related to transitions from school to work and labour market monitoring.

Another big international initiative is the 'Workforce Improvement and Skills Enhancement (WISE) programme', implemented by the United States Agency for International Development (**USAID**). The programme covers the period 2015-2019 and has a budget of €22.1 million. The main components of

the programme focus on improving technical secondary education and labour skills to meet the needs of the market; establishing partnerships between businesses and technical schools; and capacity building for business associations. Also in this case, there is potential overlap, in particular regarding the curriculum development component. A dialogue with TVET 2 PIU has been established and is open but cooperation is not as smooth as with GIZ.

The Integrated Technical Educational Cluster (ITEC) is a cooperation framework between Egypt, through the Educational Development Fund (EDF) and different international actors. Different clusters have been created through the cooperation with different international partners (e.g. a network of German Institutions for the mechanical cluster in Assiut, the Italian Ministry of Education and Emilia Romagna region for the agro-food cluster in Fayoum). The concept of the cluster is always the same, but each international actor brings its own competence-based model. Clusters work as centres of competences, defining standards of quality for other TVET providers in the same sector and delivering technical education at higher education level.

Donor coordination is improving. Cooperation between TVET programme and GIZ project is a good example. The Ministry of Education and Technical Education has taken the initiative to ensure coordination among all donors through regular monthly meetings. The situation is still challenging and overlap between all the different initiatives is still a major risk. One of the biggest factors limiting the coordination of international initiatives is the fragmentation of the TVET sector. The different Egyptian institutions launch their own projects with the support of international actors but with limited involvement of the other stakeholders. The risk is a multiplication of different models and limited sustainability and mainstreaming of project results that often remain at the pilot level or experimental stage.

D. ETF MID-TERM INTERVENTION STRATEGY IN THE COUNTRY

The **priority of ETF's mid-term intervention strategy 2017-2020** is to enhance the effectiveness and efficiency of the EU TVET 2 programme.

The ETF intervention strategy has been drawn up on the assumption of continuity in

- the priority given to the country in terms of EU external assistance,
- the level of political, economic and social stability,
- the high level of commitment in the country among key stakeholder from the national and regional authorities and among civil society to take forward the reform process in line with the national vision and strategy for human capital reform
- engagement and ownership of the country in the ETF Torino Process and according to the principles of evidence based, participatory, holistic policy making.

Particular assumptions, or conditions for the achievement of impact from ETF interventions where relevant are included under the specific objectives below.

Specific Objective 1: To support the EU Delegation (EUD) and Egyptian stakeholders in the operationalisation and implementation of the TVET 2 programme through regular content monitoring and policy advice.

Rationale: TVET 2 is an ambitious programme (EUR 117 million) that has been designed with the specific objective of addressing fragmentation of the TVET sector. TVET 2 aims at developing core

processes, which should become national standards for use in the framework of all future reform initiatives. The success of the programme will go beyond the achievements of the different tangible outputs (new curricula, teachers trained, etc.) and its success will be measured by the commitment and ownership of all key stakeholders towards the newly developed Egyptian TVET core processes. By supporting the EU Delegation in the successful implementation of this programme, the ETF will contribute to a major TVET reform in Egypt. Since TVET 2 tackles all aspects of the TVET sector (governance, provision, transition from school to work etc.), it would not be effective to launch other initiatives which risk some overlap with one or more of the programme components.

The support to TVET 2 will give the ETF opportunity to address two of the key priorities for the Egyptian TVET system (see section B above). TVET 2 will aim at developing a new strategy/vision for the sector as well as implementing the Egyptian national qualifications framework (NQF). In both these areas ETF expertise and added value are recognised and appreciated by all key stakeholders. The ETF will be able to build on previous support in the field of qualifications and governance (via the EU-funded GEMM project). ETF support is also the continuation of a multi-annual cooperation, during which the ETF designed the TVET 1 programme, delivered the content monitoring for the same programme, designed the TVET 2 programme, supported the development of the relevant terms of reference and started the content monitoring for TVET 2. The programme officially expires before 2020, but an extension is likely.

Expected results by 2020

- The EU Delegation is always updated on the success and challenges faced by the TVET 2 programme.
- Developments of the TVET 2 programme are consistent with original objectives of the programme.
- All key stakeholders are actively involved in the TVET 2 programme.

Specific Objective 2: To increase the success probabilities of the TVET 2 by complementing it in content niches not covered by the programme with ad-hoc short-term intervention

Rationale: The EUD and/or the TVET 2 PIU may need further support on specific topics, which are not directly addressed by the programme but are essential for its success. The first of these actions in 2016 concerned piloting of a costing methodology in a group of TVET providers.

Expected Results 2020:

TVET 2 programme is complemented by ETF activities in identified content niches and needs not covered by the programme.

Other areas of intervention

In addition to intervention above, the ETF will implement regular transversal activities upon request from the EUD or the European Commission (EC), such as the delivery of an annual country fiche to DG Employment, monitoring the education and skills components of the European Neighbourhood Policy (ENP) Action Plan and replying to ad hoc requests by EUD or the European Commission corresponding to ETF expertise, etc.

In the context of corporate initiatives, the ETF will continue to involve Egypt in the Torino Process, the system wide policy analysis and monitoring progress exercise implemented by the ETF on a periodic basis. The 2017-2020 period will cover the closure of the 2016 round and the implementation of the fifth round in 2019. The specific modalities for national implementation in 2019 will be agreed

according to the 2016 results and the specific development of the monitoring processes in the country. In between the two rounds, the ETF will continue the policy dialogue with all countries on policy analysis and system wide progress monitoring through VET monitoring Forums at regional and international levels.

In the period 2017-2020, ETF will continue to support the EC (DG GROW) with analysis and reporting on the country's progress on the human capital pillars of the Small Business Act for Europe (SBA). In 2017, an update of the SBA assessment will focus on policy framework for entrepreneurial learning, training for women's entrepreneurship and SME skills intelligence, with the country asked to identify good practice in all three areas. A report from the SBA assessments and dissemination will follow in 2018-2019. Follow-up of the reports' recommendations could feature in ETF support 2018-2020.

Egypt will also participate in ETF regional actions, such as the ETF Forum for Quality Assurance in VET.

E. 2017 ACTION PLAN

Specific Objective 1: To support the EUD and the Egyptian stakeholders in the operationalisation and implementation of the TVET 2 programme through regular content monitoring and policy advice.

Strategic Project Support to EU Assistance in the context of EU external policies (with thematic expertise from Strategic Project Employment and Skills and Strategic Project VET Governance)

In 2017 the ETF team will produce a content monitoring interim report at the end of July. A final report will be presented to the EUD at the end of November.

Content monitoring entails the process of assessing the progress made in VET reforms, through the contributions of the project, while at the same time providing a policy advice function on the different components of the programme. Through regular visits to the country, discussions with key stakeholders and a review of the deliverables produced, the ETF will provide the EUD with a set of conclusions and recommendations on how the programme is progressing, the main challenges, and how these could be tackled. Content monitoring will provide an analysis of whether the original objectives and results are being achieved by the programme and will play a policy advice role providing recommendations on the policy solutions proposed in the context of the programme. The ETF will dedicate a specific team to the content monitoring, as well making specific expertise available on different thematic areas in a peer review/policy advice role. The ETF will also monitor the methodological approach used to ensure the cooperation among the key stakeholders, complementarity between TVET 2 and other programmes, and synergy between the different components of the programme. The **outputs** of the content monitoring will be an interim report end-July and final report end November presented to the EUD each year.

Specific Objective 2: To increase the success probabilities of the TVET 2 by complementing it in content niches not covered by the programme with ad-hoc short-term intervention

Strategic Project Support to EU Assistance in the context of EU external policies (with thematic contribution from Strategic Project Governance)

In 2017, the ETF will support Egyptian partners to develop a national model for monitoring costs at provider level. This initiative is the continuation of a support that started in 2016 and which focused in the first year on financing and funding. The **outputs** of ad-hoc thematic support will be capacity building, methodological and analytical notes and reports.

F. 2018 UPDATES

1. Short update on key country developments in the field of VET and skills and on EU and donor cooperation

The main development was the creation of the Micro-Small-Medium Enterprises (M/SMEs) Development Agency, as per ministerial decree on 24 March 2017. In accordance with the decree, Industrial Training Council (ITC), Social Fund for Development (SFD), and the Technology Centres under the Education Development Fund (EDF) will merge and the services provided by the three institutions will be reviewed in line with the mandate of the new agency. This will have a significant impact in the TVET sector as the ITC mission will be heavily influenced by joining the new institution. In particular, ITC's work carried out on qualifications and skills standards (currently 80% of ITC work) will not be continued following the merge.

Other key developments are under discussion in the context of the development of the new TVET strategy. The EU TVET II programme is indeed reviewing all governance mechanism of the TVET sector, but final versions of the strategy and the relevant TVET law have not been agreed by all stakeholders yet. The proposal on the table foresees the establishment of a new National Training Authority, which should act as Executive body for the TVET sector.

In the framework of EU TVET II, also the role of Enterprises Training Partnerships (ETPs) is under review. The ETPs have been established in the context of the EU TVET II Programme as a “tool to bring closer the demand and the supply sides in TVET and to institutionalise the active involvement of the private sector”. However, despite the central role that all actors agree to assign to ETPs, their institutional and financial sustainability is currently not ensured. The definition of clear legal status, mandate and resources for ETPs are a priority for the TVET reform. Failing to solve these will have a negative impact on all aspects of TVET reform.

In addition to the EU, the other main donors active in the country on TVET are GIZ through the Employment Promotion Programme (EPP) and USAID through the Workforce Improvement and Skills Enhancement programme (WISE). Donor cooperation has greatly increased following the leading role taken by the Ministry of Education and Technical Education. Several donors are now cooperating on different topics. The best examples are the area of career guidance (GIZ, TVET II, and USAID) and Entrepreneurship Education (UNIDO, GIZ, TVET II, WISE, and ILO).

2. Assessment of the progress towards achievement of ETF mid-term objectives and results with horizon 2020

Specific objective1: To support the EU Delegation (EUD) and Egyptian stakeholders in the operationalisation and implementation of the TVET II programme through regular content monitoring and policy advice.

The EU Delegation has been informed through regular meetings and telephone communications, an informal note sent in advance to the July content monitoring mission, and a content monitoring report sent on September 2017.

The developments of the TVET II programme remain in line with original objectives, but the delays accumulated in the programme implementation put at risk the achievement of all expected outcomes. A detailed analysis has been presented to the EU Delegation in the content monitoring report. Discussions on how to address these challenges are ongoing.

In relation to the involvement of stakeholders in the programme, the management of the TVET II programme is significantly more participatory than what it was in TVET I programme. Concerns remain on what role the key stakeholders are playing in addition to be the beneficiaries of the programme. A detailed analysis has been included in the content monitoring report.

Specific Objective 2: To increase the success probabilities of the TVET II by complementing it in content niches not covered by the programme with ad-hoc short-term intervention

In 2017, the ETF has provided specific support on the review of TVET financing model. An ad hoc report has been sent to the concerned contractors and PIU and its main conclusions included in the content monitoring report. Following a discussion with the relevant stakeholders it has been agreed that the support on the financing topic will be integrated in the overall content monitoring of the programme and that there is no need to activate specific actions for it in 2018.

Other interventions

Egypt has been selected in 2017 as a pilot country for a new ETF intervention focusing on skills mismatch. Working on a common methodology and based on a detailed data collection process of available resources in the country, the ETF has produced a country report on the situation of skills mismatch in Egypt.

3. 2018 Action Plan

Specific Objective 1: To support the EUD and the Egyptian stakeholders in the operationalisation and implementation of the TVET II programme through regular content monitoring and policy advice

Strategic Project Support to EU Assistance in the context of EU external policies (with thematic expertise from Strategic Project Employment and Skills and Strategic Project VET Governance)

By the end of June 2018, the ETF team will produce a content monitoring report. In addition, throughout the year the content monitoring team will produce informal notes for the EU Delegation based on the regular meetings in the country.

The support provided in the framework of the overall content monitoring will include in depth analysis of specific technical deliverables in the areas of **governance, qualifications and labour market information**. The results of these in depth focus will be attached to the content monitoring report as annexes.

Furthermore, upon **request from the European Commission or the EU Delegation** ETF will provide support to:

- the ENI programming;
- the EU-Egypt policy dialogue:
 - Inputs to monitoring of the ENP Action Plans;
 - Inputs to relevant bilateral sub-committee meetings;
- Delivery of annual country fiches to DG Employment.

Other areas of intervention

The ETF will continue its support in the area of **evidence based policy analysis** and system wide progress monitoring. All countries will be invited in early 2018 to kick off preparations for the 5th round

of the Torino Process, with the scope of agreeing on terms of implementation by end of 2018. The preparation phase will involve countries primarily through online consultations and capacity building activities involving appointed national coordinators and key working group members. All countries will be invited to join the kick-off meeting, which will take place in Q4 of 2018 in Turin. Countries aiming at implementing the Torino Process at sub-national level too will be followed by specific activities in 2018 in view of preparing regions and cities for the round of analysis. A new national data collection exercise aimed at acquiring more in depth data, mapping gaps, sources and recurrence of data collection in the area of VET and Skills will be launched in 2018.

Also as part of evidence-based policy analysis, the results from the **2017 SBA assessment** which addressed entrepreneurship promotion in VET, women's entrepreneurship training and skills for SME internationalisation, will be published and disseminated in 2018 through a ministerial meeting and ETF networks.

Egypt will also participate in the ETF regional actions, such as the the ETF Forum **for Quality Assurance** in VET and the follow-up actions to the joint UNESCO-ETF review of work-based learning policies and programmes for young people in the region.

Egypt will continue to be part of **the skills mismatching project**. Following the production of a national report in 2017, key country representatives will be invited to an international conference focusing on the same topic. The results of the study will be also used to inform policy debate and provide relevant policy advice in the context of the content monitoring of the TVET II programme.