

Education for All (EFA) 2000 Assessment

Name of Country: South Africa

National Assessment Co-ordinator: Nomso Mjijima

Address: Chief Director, Quality Assurance and National Institute for Lifelong Learning Development,
Department of Education, Private Bag X895, Pretoria, 0001, South Africa

Telephone: +27 (12) 312 5118/9

Fax: +27 (12) 326 2191

E-mail: mjijima.n@doe.gov.za

PROCESS

To facilitate the EFA 2000 Assessment process, the Director-General of the national Department of Education (DoE) constituted an administrative structure comprising of a national advisory committee, a technical committee and a working group. The advisory and technical committees shaped the assessment exercise while the working group was intended to oversee all the data collection, data analysis and interpretation activities including reporting on the 18 core EFA indicators. Key major stakeholders were represented in the advisory and technical groups, including the universities' education policy units (EPUs), Centre for Education Policy Development (CEPD), Human Sciences Research Council (HSRC), Education Foundation and representatives of the Provincial Education Departments. The Council of Education Ministers (CEM), the Heads of Education Department Committee (HEDCOM) and the DoE's senior management were sensitised about the need and rationale for the exercise and were kept informed of progress throughout. Development agencies and EFA Convenors were involved in all consultative meetings and there has been close collaboration with UNESCO and UNICEF throughout the process.

The Minister of Education, Professor Kader Asmal, launched the South African Assessment Report at a national conference held in Pretoria, on 1-2 December 1999. The conference organisation was handled by Abt Associates and sponsored by USAID. About 200 participants attended including key stakeholders from the following organisations: National and Provincial Departments of Education, higher education institutions, religious bodies, teacher unions and funding agencies. Recommendations of the conference as well as those of the National Consultative Workshops have been incorporated in this report.

Graphic

Graphic (The President of South Africa, Thabo M. Mbeki, at the Opening Session of the Sub-Saharan Africa Conference on Education for All, which was held in Johannesburg from 6-10 December 1999)

ACKNOWLEDGEMENTS

The completion of this report was a collaborative effort involving a number of individuals and organisations. Special acknowledgements are extended to the following organisations and individuals for the facilitation and support they rendered:

- ¥ The Human Sciences Research Council (HSRC) for piloting the study to validate the instruments for the South Africa Monitoring Learning Achievement (MLA) Survey;
- ¥ Personnel of the Chief Directorate of Quality Assurance, Department of Education, for their assistance and advice, and the overall facilitating role they played;
- ¥ Provincial Departments of Education for facilitating the pilot and national Monitoring Learning Achievement (MLA) Survey, in particular, the provincial Quality Assurance officials;
- ¥ National and Provincial Education Management Information System (EMIS) sections;
- ¥ The South African National Commission for UNESCO for support and coordination of the assessment exercise;
- ¥ The UNESCO Pretoria Office Senior Education Adviser for Technical Support;
- ¥ UNICEF South Africa Office for support and capacity building;
- ¥ United Nations Development Programme (UNDP) for support.
- ¥ The Department for International Development - UK (DfID) for support;
- ¥ USAID for sponsoring the National Conference;

¥ The Education for All Regional Technical Advisory Group (RTAG) for Eastern and Southern Africa for support, guidance and capacity building;

¥ Participants of the two National Consultative Workshops (2 and 22 September 1999, respectively) for their suggestions and assistance;

¥ Prof. J Strauss and Prof. J Van der Linde of the Research Institute for Education Planning (RIEP), University of Orange Free State and staff for data capturing, processing and preparing this report; and

¥ Dr. G. Gule of Research Dynamics South Africa for technical editorial support.

Graphic (Professor Kader Asmal, Minister of Education, South Africa)

PREFACE

The 1990 World Conference on Education for All, held in Jomtien, Thailand, drew world attention to the critical importance of quality basic education. 155 governments endorsed the World Declaration on Education for All and the associated Framework for Action with its six "target dimensions". However, in 1990 South Africa was not at the World Conference but stayed at home, locked in a titanic struggle to end apartheid, and bring in a new South African order. Ten years later, our democratic government joins with relish in celebrating Education for All and participating fully in the assessment.

The South African Assessment Report is a stock taking exercise, part of an extraordinary global effort coordinated by the United Nations family of agencies, that aims to measure how well nations of the world have fared in pursuit of the Education for All goals. By means of a set of core indicators, countries have been asked to spell out what has been learned, identify successes and shortfalls and suggest the most promising policy directions that can be pursued in partnership with the international community.

The work we are doing to transform a broken-down and corrupted system of separate and unequal education provision is wonderfully consistent with the most progressive thinking in the world community. But we are still far from having made good progress on our own constitutional duty to respect, protect, promote and fulfil everyone's unqualified right to a basic education. We have no excuse for defaulting on an obligation, which is undeniably central to the lives and welfare of our people.

That is why we are mobilising so passionately behind Tirisano - working together. Since publishing our Call to Action in July 1999 we have worked hard at producing the implementation plan that translates our nine priorities into operational programmes with clear targets, outcomes, timelines and performance indicators. In our annual Education Parliament we will meet and take stock, build solidarity and partnerships in support of our national goals, and be advised on how we can achieve them more effectively. This Education for All Assessment Report will be among the important reference works for the Parliament to consider. Remarkably, it is the first of its kind, truly a landmark as well as a benchmark for our education system.

I congratulate all those who have contributed to the success of this challenging undertaking and thank all the UN and development co-operation agencies for their moral, material and professional support. We were not at Jomtien in 1990 but we will be proudly taking our place at the World Education Forum in Dakar, Senegal, in April 2000, sharing with the world what we know from our own experience. Our South African Assessment Report will help us do so from a position of strength and confidence.

Professor Kader Asmal

Minister of Education

[Graphic \(President of South Africa, T.M. Mbeki with Minister of Education, Prof K. Asmal, at the Opening Session of the Sub-Saharan Africa Conference on Education for All\)](#)

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Acronyms

ABET:	Adult Basic Education and Training
AIDS:	Acquired Immune Deficiency Syndrome
CEM:	Council of Education Ministers
CIDA:	Canadian International Development Agency
COLTS:	Culture of Learning, Teaching and Service
DANIDA:	Danish International Development Agency
DfID:	Department for International Development (UK)
ECD:	Early Childhood Development
EFA:	Education for All
ELSEN:	Education for Learners with Special Education Needs
EMD:	Education Management Development
EMIS:	Education Management Information System
ETQA:	Education and Training Quality Assurance Body
FET:	Further Education and Training
GDP:	Gross Domestic Product
HEDCOM:	Heads of Education Departments Committee
HIV:	Human Immuno-deficiency Virus
HSRC:	Human Sciences Research Council
KZN:	KwaZulu-Natal Province
MLA:	Monitoring Learning Achievement
NCCRD:	National Centre for Curriculum Research and Development
NCESS:	National Committee on Education Support Services
NCSNET:	National Commission on Special Needs in Education and Training
NGO:	Non-Governmental Organisation
NMYIP:	National Multi-Year Implementation Plan
NQF:	National Qualifications Framework
OBE:	Outcomes-based Education

PEI: President's Education Initiative

PERSAL: Personnel Salary System

RDP: Reconstruction and Development Programme

RIEP: Research Institute for Education Planning

RPL: Recognition of Prior Learning

SABC: South African Broadcasting Corporation

SAQA: South African Qualifications Authority

SGB: School Governing Body

SIDA: Swedish International Development Authority

SYSTEM: Students and Youth into Science, Technology, Engineering and Mathematics

UNDP: United Nations Development Programme

UNESCO: United Nations Educational, Scientific and Cultural Organisation

UNFPA: United Nations Fund for Population Activities

UNICEF: United Nations International Children's Emergency Fund

USAID: United States Agency for International Development

Table of Selected EFA* Indicators: South Africa Assessment

Graphic ("Our specific mandate must be seen within the context of our primary obligation, to ensure that all South Africans have opportunities to pursue educational goals. We have a special commitment to ensure that the vast majority of our people who have been disadvantaged through apartheid are able to succeed in learning of high quality. We will ensure that the public resources that we hold in trust are effectively and efficiently utilised in the pursuit of these goals." - extracted from: Implementation Plan for Tirisano January 2000 - December 2004, Working Together to Build a South African Education and Training System for the 21st Century. Mr Thami Mseleku, Director-General)

Executive Summary

The purpose of the South African Education for All (EFA) 2000 Assessment was to assess and report progress towards meeting the country's goals in the provision of basic education for children, youth and adults. This report highlights major achievements in the provision of basic education for all and identifies key challenges and priorities which need attention if the provision of quality basic education is to improve in the near future.

The assessment was guided by a set of core EFA indicators selected by a Technical Advisory Group which was constituted from representatives of the Convenors (UNDP, UNFPA, UNESCO, UNICEF and World Bank) of the International Consultative Forum on Education for All. Additional indicators were utilised to facilitate the assessment of progress in the implementation of the expanded vision of basic education.

This report is primarily based on data from the 1999 South Africa Monitoring Learning Achievement (MLA) Survey, the 1997 Education Management Information System (EMIS) dataset, the 1996 South African Population Census, and the 1996 Schools Register of Needs dataset. The South Africa MLA Survey was conducted under the auspices of the National Department of Education and sought to obtain information on learning achievement and outcomes in primary schools as well as to determine factors that impact on the quality of teaching and learning.

Due to the relative newness of most of South Africa's EFA related activities, the assessment did not seek to establish the impact of these initiatives. Consequently, the report provides a situation analysis of the provision of basic education and recommends future actions for achieving EFA objectives.

The EFA 2000 Assessment as already alluded to above is a global initiative which is guided by well delineated guidelines which all participating nations are expected to follow. However, in the case of South Africa because of late entry into the process, this report has not strictly adhered to these guidelines. Nonetheless, other aspects of EFA 2000 assessment are effectively covered thus making the content of the report compliant with the general EFA process and sufficiently robust.

KEY FINDINGS

The key findings of this report are as follows:

1. Primary Education

School Enrolment

¥ South Africa has a net enrolment ratio of 87 percent in primary schools, indicating that it has not yet realised its goal of providing universal primary education to all its children in the official primary school age group (i.e., 6-14 completed years).

¥ The school system is able to absorb nearly all its primary school population, including those outside the official age bracket. This is implied by the gross enrolment ratio of 97 percent.

¥ The very high gross enrolment ratios (i.e., exceeding 100 percent) in some provinces indicates a high prevalence of registration of under and over-aged children in primary schools. This practice is highly prevalent in the Eastern Cape where the gross enrolment ratio is 111.9 percent.

Expenditure

¥ There has been an increase in overall expenditure on education, with expenditure increasing from R34.1 billion during the 1995/96 financial year to R45.2 billion during the 1998/99 period.

¥ The total education budget constitutes about 22 percent of the total national budget, which is a high share compared to that of other countries in sub-Saharan Africa.

¥ Per capita expenditure on primary school education is R2,370. The Western Cape and Gauteng have the highest per capita expenditure (R3,740 and R2,951 respectively), whereas the Eastern Cape (R1,947), KwaZulu-Natal (R2,008), Northern Province (R2,042) and Mpumalanga (R2,291) have the lowest expenditure levels.

Learner-Educator Ratios

¥ The learner-educator ratio for South Africa's public primary schools is 35, which means that on average each educator has to cater for 35 learners. Mpumalanga (39) and KwaZulu-Natal (40) have the highest ratios, while Western Cape has the lowest ratio (25). It is interesting to note that though Western Cape has the lowest learner-educator ratio it also has the highest per capita expenditure on education, reflecting an imbalance in the allocation of resources among and between provinces.

¥ The South Africa MLA Survey found that the learner-educator ratio exceeds 40 in a number of primary schools.

¥ The MLA Survey also confirmed earlier reports (e.g., Schools Register of Needs) that there is an inadequate provision of classrooms and infrastructure needs in many schools. This results in poor conditions of teaching and learning including crowded classrooms, disciplinary and other related problems.

Qualification of Educators

¥ Nearly a quarter (24 percent) of primary school educators are not appropriately qualified (i.e., they are unqualified or under-qualified). The employment of these educators is often dictated by a shortage of human resources, particularly in the rural areas.

¥ The employment of unqualified or under-qualified educators is highest in North West, KwaZulu-Natal and the Free State Provinces (34, 32.8 and 30.5 percent, respectively) and lowest in the Western Cape (10.2 percent) and Gauteng (12.4 percent) Provinces.

Repetition Rates

¥ Repetition of grades is common in South African primary schools. Repetition rates are highest in Grade 1.

¥ The MLA Survey revealed that about 17 percent of Grade 4 learners were found to have repeated one or more grades. Repetition rates are higher among boys than girls.

Out-of-School Children

¥ The prevalence of non-school attendance among children eligible to enroll in primary school is relatively high. In 1996, about 16 percent of children aged 6-14 years were out-of-school. This confirms the finding that the goal of universal primary education has not yet been realised.

¥ Disparities in proportions of out-of-school children are huge. The prevalence of non-schooling was found to be highest:

- In rural areas (19.1 percent);
- Among black Africans (17.3 percent);
- Among boys (16.6 percent); and
- In the Eastern Cape (18.8 percent), Northern Province (18 percent) and North West (17.8 percent).

Non-school attendance is lowest:

- In urban areas (11.4 percent);
- Among Indians/Asians (4.5 percent);
- Among girls (14.9 percent); and
- In the Western Cape (9.9 percent).

¥ These disparities are an indication that strategies aimed at improving access to primary education should give highest priority to African children, particularly those in disadvantaged provinces and rural areas.

Factors Affecting the Provision of Quality Primary Education

The following factors were found to negatively impact on the quality of teaching and learning in South African primary schools:

¥ The physical environment of many schools is not conducive to quality teaching and learning. It was found that:

- About 25 percent of primary and combined schools have no access to water within walking distance;
- Nearly half (48.6 percent) of primary and combined schools use pit latrines and these are often insufficient in number, over-utilised, unclean and smelly. Another 13.5 percent of schools have no sanitary facilities at all. Such sanitary conditions pose health hazards to learners and educators alike;
- The majority of schools (56.2 percent) have no electricity. Poor lighting and seeing conditions in these schools hamper the learning process. Lack of electricity also prevents the use of modern teaching and learning aids and equipment.
- About 5 percent of schools have decrepit and dilapidated buildings that are unsafe and unsuitable for teaching and learning.

¥ Most schools lack adequate supplies of teaching and learning materials. Even when available the materials are sometimes ineffectively used. The lack of lockable storage facilities makes it difficult to

safeguard existing materials. There is a need for timely and adequate provision of educational materials and lockable storage facilities as well as the appropriate training of educators.

2. Learning Achievement and Outcomes

¥ The general performance of South African primary school learners is poor. The average score obtained by Grade 4 learners targeted by the South Africa MLA Survey was below 50 percent in all the tasks in which they were tested (i.e., literacy, numeracy and life skills tasks).

¥ Performance in numeracy was the poorest, the average score being 30 percent. About 44 percent of the learners obtained less than 25 percent.

¥ Learners had a better grasp of literacy and life skills tasks, even though the overall performance was still low, the average scores being 48 and 47 percent, respectively. In these tasks a significantly lower proportion of learners scored less than 25 percent (i.e., 14 and 8 percent, respectively).

¥ Gauteng and Western Cape Provinces have the best performance on all the three task areas. For example, the average literacy task score is 61 percent in both provinces, which is about two times the score of learners in Mpumalanga Province.

¥ The main causes of poor learner achievement include:

- Poor educational background of parents;
- Poor conditions of teaching and learning;
- Inappropriate teaching and learning methods;
- Lack of access to reading and other educational materials and libraries;
- Poor school management;
- Lack of order and discipline among learners and educators often resulting in loss of teaching and learning time; and
- Low morale of educators and principals.

3. Youth and Adult Literacy

¥ Illiteracy is prevalent in South Africa, particularly among older persons who were marginalised from educational opportunities under the apartheid system.

¥ About 67 percent of persons aged 15 years and above and 83 percent of those aged 15-24 have completed Grade 6 and are considered to be functionally literate (i.e., they have acquired basic literacy skills).

¥ Western Cape and Gauteng have the highest literacy rates among persons aged 15 years and above (76.4 and 75.6 percent, respectively). The Northern Province, on the other hand, has the lowest literacy rate (58.9 percent).

CHALLENGES AND KEY PRIORITIES

There are several challenges and priorities which need to be tackled to achieve the goal of quality basic education for all citizens of South Africa. These include:

- ¥ Building the capacity of educators and school managers;
- ¥ Achieving desired learning outcomes through improved teaching and learning methods;
- ¥ Improving learner achievement;
- ¥ Improving youth and adult literacy;

- ¥ Rehabilitating school infrastructure;
- ¥ Improving access to teaching and learning materials;
- ¥ Improving access to the media and other means of communication;
- ¥ Fostering community integration and involvement in the life of the school;
- ¥ Developing effective monitoring and evaluation mechanisms and systems;
- ¥ Changing attitudes towards implementation of new policies;
- ¥ Improving accessibility to schools and supervisory support; and
- ¥ Confronting the HIV/AIDS pandemic.

KEY RECOMMENDATIONS

In order to accelerate progress towards the attainment of the EFA 2000 goals, the following is recommended:

- ¥ Expansion of ECD programmes to meet the demands of parents and to prepare children for timely and appropriate age entry into Grade 1;
- ¥ Entry-age into Grade 1 should be closely regulated;
- ¥ More of the education budget should be spent on direct inputs;
- ¥ The school building programme needs to be expedited;
- ¥ Literacy must be connected with adult basic education and skills training and integrated into lifelong learning;
- ¥ Capacity building should be planned, prioritised, systematised and localised as much as possible;
- ¥ School managers need to be equipped for management, leadership and control;
- ¥ Streamline school governance and clarification of roles; and
- ¥ Upgrade and deploy resources for the utilisation of other media to enhance teaching and learning.

This executive summary has pinpointed key findings, isolated the main challenges faced by South Africa in its pursuance of education for all and outlined attainable recommendations to turbo boost the Government's and other stakeholders' efforts towards ensuring that the majority of the people get a quality education. The recommendations made in this report will demand goodwill, political will and co-operation among all stakeholders for their effective implementation.

Graphic (Father S Mkhathshwa, Deputy Minister of Education, at the Closing Session of the Sub-Saharan Africa Conference on Education for All)

Chapter 1

Introduction

The World Conference on Education for All (EFA) held in Jomtien, Thailand, from 5 to 9 March 1990 adopted the World Declaration on Education for All and Framework for Action to Meeting Basic Learning Needs.¹ These documents were products of a wide and systematic consultation process which took place between October 1989 and January 1990 under the auspices of the Conference Convenors - UNDP, UNFPA, UNESCO, UNICEF and the World Bank.

The Jomtien Conference was convened jointly by the Executive Heads of the five Convenors - UNDP, UNFPA, UNESCO, UNICEF and the World Bank. In addition, 18 agencies, organisations and governments cosponsored the Conference, including the Royal Government of Thailand, which hosted the meeting. Approximately 1,500 delegates from 155 countries participated in the Conference. These included policy-makers, experts in education and other major sectors, as well as officials and specialists representing some 20 inter-governmental bodies, 150 non-governmental organisations (NGOs), multilateral and bilateral development agencies and the research community.

The World Declaration on Education for All and the Framework for Action to Meeting Basic Learning Needs, represent an international consensus on an expanded vision of basic education, which is a broader concept than primary schooling. It comprises expansion of early childhood education, improving learning achievement, reducing male-female literacy gap, expansion of basic education opportunities for youth and adults, and use of all available communication channels to promote knowledge, skills and values for better living. The expanded vision ensures that the basic learning needs of children, youth and adults are met effectively.

According to Article 2 of the Declaration, the expanded vision encompasses the following components: universalising access to basic education and promoting equity; focusing on learning acquisition; broadening the means and scope for basic education; enhancing the environment for learning; and strengthening partnerships. Implementation of this expanded vision requires the development of a supportive enabling policy and a legislative environment, mobilisation of resources and strengthening of partnerships, including strengthening international solidarity.

The Framework for Action to Meeting Basic Learning Needs provides 'Guidelines for Implementing the World Declaration on Education for All' and sets six dimensions and suggests certain targets for meeting basic learning needs.² The dimensions and targets are as follows:

DIMENSION 1: Early Childhood Care and Development

Target: Expansion of early childhood care and developmental activities, including family and community interventions, especially for poor, disadvantaged and disabled children.

DIMENSION 2: Primary Education

Target: Universal access to, and completion of, primary education by the year 2000.

DIMENSION 3: Learning Achievement and Outcomes

Target: Improvement of learning achievement such that an agreed percentage of an appropriate age cohort (e.g., 80% of 14 year olds) attains or surpasses a defined level of necessary learning achievement.

DIMENSION 4: Adult Literacy

Target: Reduction of the adult illiteracy rate, particularly female illiteracy, in order to reduce disparities.

DIMENSION 5: Basic Education and Training in Other Skills

Target: Expansion of provisions of basic education and training in other essential skills required by youth and adults.

DIMENSION 6: Knowledge and Skills for Better Living

Target: Increased acquisition by individuals and families of the knowledge, skills and values required for better living and sound and sustainable development, made available through all education channels.

The Framework for Action to Meeting Basic Learning Needs while acknowledging diversity in participating countries' situations, capacities and development plans and goals, suggests certain areas for national planning. These areas include: assessing basic education needs and planning action; developing a supportive policy environment; designing policies to expand and improve basic education; improving managerial, analytical and technological capacities; mobilising various information and communication channels; and building partnerships and mobilising resources. Accordingly, national policies and programmes for the expanded vision for education must be especially concerned with relevance, quality, equity and efficiency of basic education.

1.1 SOUTH AFRICA'S PARTICIPATION IN THE EFA PROCESS

South Africa did not participate in the Jomtien World Conference in 1990 because of its international isolation due to its apartheid policies. After its first democratic elections in 1994, South Africa was invited to participate in the EFA process, and was welcomed at the Mid-decade Review on Education for All which was held in Amman, Jordan, in 1996. Because of its late entry into the EFA process, South Africa was not able to comply with all the recommended EFA guidelines set out in the Framework for Action to Meeting Basic Learning Needs. Though it has no explicit EFA National Plan of Action it has, however, embraced the EFA principles, goals, targets and guidelines contained in both the Declaration and the Framework. As such, policies and programmes developed after 1994 to facilitate the transformation of the education system of South Africa are to a large degree consistent and compatible with the Framework.

1.2 OBJECTIVES OF THE EFA 2000 COUNTRY ASSESSMENT The EFA 2000 Assessment is a global endeavour conceived during the preparation of the Framework for Action to Meeting Basic Learning Needs. The aim of the assessment is to review progress made towards achieving goals and targets in the provision of basic education and lifelong learning. The review was designed to assist countries in re-examining their national objectives and strategies concerning basic education and refocusing their priorities.

Eighteen indicators, spanning most of the EFA target dimensions, were developed to facilitate assessment of progress in the implementation of EFA goals and objectives (UNESCO, 1998). All countries participating in the assessment are expected to utilise as much as possible these indicators for uniformity of reporting and comparability of results. Countries participating in the assessment were encouraged to utilise additional indicators to add value to their country reports.

The objectives of the South Africa EFA 2000 Assessment are:

- ¥ To construct a comprehensive picture of South Africa's progress towards meeting its EFA goals;
- ¥ To identify major achievements in the provision of basic education and the key success factors;
- ¥ To identify challenges and gaps in the provision of basic education for all; and
- ¥ To identify priorities and promising strategies for overcoming obstacles and accelerating progress.

The South African Assessment Report, was alongside others, tabled for discussion at the sub-Saharan Conference on Education for All which was hosted by the Republic of South Africa and held in Johannesburg from 6-10 December 1999. The Conference resolution was synthesised into a report for discussion at the World Education Forum to take place in Dakar, Senegal, from 26 to 28 April 2000.

1.3 SCOPE AND LIMITATIONS OF THE COUNTRY ASSESSMENT

The South Africa EFA assessment was limited by a number of factors, including the following:

- ¥ There was inadequate time to prepare for the assessment. After an important consultation process, the assessment was only initiated in February 1999.
- ¥ Lack of adequate funding provision for the assessment exercise caused delays in the launching of the process.
- ¥ Key areas of assessment included collation and collection of primary data for the indicator on learning achievement (Indicator 15). This caused further delays as many implementation bottlenecks were experienced. Also, shortage of time and resources made it difficult to gather information on other key indicators such as early childhood development and youth and adult literacy rates.
- ¥ Due to South Africa's late entry into the EFA process, and due to the fact that implementation is at its early stages, this assessment exercise will not report on the impact of many EFA initiatives that the country has put in place. The information contained in this report will to a large part serve as a benchmark against which future assessments can be made.
- ¥ Though national structures to guide the EFA country assessment were established, budgetary and time constraints did not allow their full operationalisation and as result, the process has not been as participatory as anticipated. Despite these severe limitations, the writing of this report was finally organised in the manner described below.

1.4 ORGANISATION OF THE REPORT

Chapter 2 of this report gives the background on South Africa, which includes an examination of the policy and legislative framework, as well as the description of the South African educational system. Chapter 3 describes the methodology used for data collection and computation of the selected EFA indicators.

In Chapter 4, the report deals with EFA strategies that South Africa has adopted, which include the transformation of the educational system, cooperation and partnerships, and financing of basic education. It also describes some of the structures that have been put in place to facilitate implementation of EFA strategies.

Chapter 5 analyses education policy implementation by utilising some of the EFA core indicators and other key education indicators. The reporting is more or less consistent with the EFA dimensions that are contained in the Framework for Action to Meeting Basic Learning Needs.

The final chapter, Chapter 6, discusses major achievements in the provision of basic education. It also identifies challenges and recommends key priorities which need attention if the goal of providing quality basic education for all is to be realised in the future.

Graphic (Mme. Aïcha Diallo, Representative of the Director-General of UNESCO and Director of the Division of Basic Education, UNESCO, Paris, France, at the Closing Session of the Sub-Saharan Africa Conference on Education for All.)

Chapter 2

BACKGROUND

This chapter presents background information on South Africa, which includes the discussion of the country's profile and an examination of the policy and legislative framework as well as a description of the South African education system.

2.1 COUNTRY PROFILE

The Republic of South Africa is situated in the southernmost part of the African continent, bordering Namibia, Botswana, Zimbabwe, Mozambique and the Kingdoms of Swaziland and Lesotho. Its total land area is 1,219,090 km² and stretches latitudinally from 22° to 35°S and longitudinally from 17° to 33°E.

2.1.1 Demographic Characteristics of the Population

Population Growth and Age Structure

South Africa has a population of 40.1 million. Slightly more than a third of the population (34 percent) is aged less than 15 years (Statistics South Africa, 1998), implying that South Africa has a young population. The population grew at 1.9 percent per annum during the 1995-1996 period, having declined from 2.2 percent during the 1980-1990 period (Department of Welfare, 1998). Though South Africa's growth rate is relatively low compared to that of other countries in sub-Saharan Africa, the rate of growth is still of concern, particularly in the presence of a slumping economy during the post-1994 period. Such a situation is undesirable because it exacerbates the backlog in the provision of education facilities and services, resulting from past apartheid policies.

Spatial Population Distribution

South Africa is divided into nine provinces, each with its own legislature, Premier and Executive Council. According to Figure 1 and Annex 1, KwaZulu-Natal and Gauteng have the largest share of the population (20.7 and 18.1 percent, respectively), while the Northern Cape has the smallest share (2.1 percent).

About 54 percent of South Africans reside in urban areas. Urbanisation levels, however, vary substantially by province. The percentage of persons residing in urban areas varies from only 11 percent in the Northern Province and 35 percent in the North West, to 88 and 97 percent in the Western Cape and Gauteng, respectively. The more urbanised provinces tend to have better education facilities and services than the less urbanised provinces.

Table 1 shows that African blacks constitute the vast majority (76.7 percent) of the South African population. Indians/Asians on the other hand are the minority, comprising only 2.6 percent of the population.

Educational Attainment

A significant proportion (19.3 percent) of the South African population aged 20 years and above has never been to school (see Figure 2). The prevalence of no schooling is highest in the Northern Province (36.9 percent), the proportion being about four times as much as that of the Western Cape and Gauteng (6.7 percent and 9.5 percent, respectively), which have the lowest prevalence. No schooling is much higher in rural areas (52.5 percent) than in urban areas (14 percent).

These findings have implications for teaching and learning in South Africa. For example, in a study conducted in the Nkandla District of KwaZulu-Natal, lack of support to learners by parents, an element that is key to effective teaching and learning, was ascribed to low literacy levels of the parent population (Karlsson and Gule, 1999).

Figure 1: Percentage Distribution of the Population of South Africa by Province, 1996

Table 1: Population Distribution by Population Group, South Africa, 1996

2.1.2 Economic and Socio-Political Environment:

Their Impact on Education

Economic Environment

In 1996 about 34 percent of the South African labour force was unemployed, the unemployment problem being more pronounced among youth (i.e., persons aged 15-24), the youth unemployment being 53 percent (Mosai and Gule, 1999). The unemployment problem has worsened since 1996, in part due to the poor performance of the South African economy.

High unemployment contributes to and in turn is affected by the high levels of poverty that pervade South Africa (Government of South Africa, 1998). Economic restructuring and global trends, as well as labour market inefficiencies and inequalities also affect youth participation in the labour market. In order to reduce poverty, which is one of the leading goals of the Reconstruction and Development Programme (RDP) of the democratic government of South Africa, it is imperative to address the unemployment problem by strengthening job creation initiatives and improving preparedness for the labour market by enhancing the quality of education throughout the different levels of the system.

Political Environment (and Impact on the Education System)

The socio-political conditions of South Africa were both shaped and devastated by apartheid. From 1948 to 1994, succeeding apartheid-driven regimes enforced a social policy which revolved around maintaining white hegemony and economic prosperity to the exclusion of other races, which suffered extremes of poverty and degradation. The entrenchment of such policies resulted in social inequalities and poverty along racial lines. Black South Africans in particular were deprived opportunities to access basic social services such as education, health, clean water, sanitation, electricity and other amenities.

The apartheid policy was similarly applied to education with the introduction of Bantu Education in 1953. Whereas church missions had promoted interracial education, the advent of legal apartheid wrenched the control of public schools from missionaries to the state. Around the 1960s and 70s the expansion of schooling under the Bantu education system focused at redirecting individuals to "homelands". The homelands were strategically scheduled areas for black Africans, but they lacked economic viability. Under the Bantu Education Policy, the funding for education was also allocated on an unequal basis. The aim was to perpetuate white supremacy by giving them a better quality education than that given to other races.

The adverse effects of Bantu education were wide-ranging. Illiteracy and innumeracy increased and high level skills among black Africans became limited. By 1990 it was reported that 66 percent of the youth and adults between 16 and 34 were functionally illiterate. A majority of this cadre was identified to be among the black population. It was further noted that schools attended by blacks were not only under-resourced and understaffed, but were also experiencing high dropout and failure rates. The result was the total collapse of the teaching and learning culture as people resisted subjugation of the so-called Bantu education.

During the negotiations for a democratic order in the early 1990s, all parties considered education as the key issue for the Reconstruction and Development Programme (RDP). Central to the process were issues of access, redress, equity and quality.

The release of Nelson Mandela in 1990, the subsequent political negotiations for a democratic dispensation and his presidency, have brought a new era. The democratically elected government that came to power in 1994, inherited political and economic structures set up under apartheid, that were designed to protect the interests of the white minority and restrict access by the black majority to property, economic opportunity and public services, especially health and education. Consequently and understandably, the government set as its priority the development of policies to redress the legacy of disparities and inequalities. It is clear that since the transition in 1994, South Africa has engaged in far-reaching and fundamental education reforms, thereby breaking decisively with the apartheid past.

South Africa has had major achievements, mainly in terms of policy development. Firstly, South Africa has produced a universally lauded constitution, which codifies and safeguards the rights of all citizens and guarantees a representative and accountable government. Secondly, sound economic management has reversed a decade of economic decline and refocused public spending on services for the poor. Thirdly, a policy framework has been established to promote development and enhance opportunity or prospects for the previously disadvantaged majority. However, despite these achievements, much still remains to be done to complete the transformation process.

Figure 2: Percentage of persons aged 20 years and above with no schooling by Province, South Africa, 1996

2.2 POLICY AND LEGISLATIVE FRAMEWORK

Since 1994 South Africa has embarked on an open and transparent process of policy-making. The most important policies and legislation regulating the provision of basic education are outlined below. It is important to read these policies and legislation in parallel, as there are inherent overlaps, as each seeks to meet constitutional provisions.

2.2.1 The Constitution

With the adoption of the new Constitution came also the transformation of the education system guided by various policy and legislative instruments. A unitary system of education was created and was to be managed by the National Department of Education and nine Provincial Education Departments. In effect, the 1996 Constitution requires that education be transformed and democratised in accordance with the following values:

¥ Human dignity, the achievement of equality and the advancement of human rights and freedoms; and

¥ Non-racism and non-sexism. The Constitution recognises that everyone has a right to basic education, therefore, the state must do all that is reasonable to ensure that everyone receives basic education. The Constitution states:

Everyone has the right -

(a) To basic education, including adult basic education; and

(b) To further education, which the state, through reasonable measures, must make progressively available and accessible.

The democratisation of education includes the idea that all stakeholders (i.e., parents, educators, learners, and members of the community) must participate in school activities. This idea is taken further in the South African Schools Act (1996)³ which requires all learners to have equal access to basic and quality education without discrimination of any kind.

2.2.2 The National Education Policy Act, 1996

The National Education Policy Act⁴ is pivotal in facilitating the democratic transformation of the national system of education into one that serves the needs and interests of all the people of South Africa and it upholds their fundamental rights.

The Act gives the Minister of Education the power to determine national education policy for the planning, provision, financing, staffing, co-ordination, management, governance, programmes monitoring and evaluation and general well-being of the system. In determining policy the Minister should take into account the competence of the provincial legislatures and the relevant provisions of any provisional law relating to education.

2.2.3 The South African Schools Act, 1996

The South African Schools Act (1996), which replaced Education Acts of the apartheid government, asserts that all learners have a right to access both basic and quality education without discrimination of any sort. Therefore "no learner may be denied admission to an ordinary school on any grounds, including grounds of disability, language, learning difficulty or pregnancy" (Department of Education, 1997a: 44).

The Schools Act (1996) further requires that the quality of education received by all learners must be improved. This implies that there must be a better provision of facilities, better-trained educators, better methods of teaching and learning and improved school conditions. Learners must also be better motivated and disciplined to take their education seriously and to use the opportunities that are now open to them.

The South African Schools Act has paved the way for a single, non-racial school system. It also makes schooling compulsory for children aged 6-14 completed years.⁵ It provides for two types of schools, namely public and independent schools. A significant change introduced by the Act is that the previous differentiation of State-funded schools no longer exists, and now these schools are all referred to as public schools. It also provides for conditions of admission for learners to public schools and for governance of public schools by school governing bodies. These governing bodies have general functions as stated in Section 20 of the Act.

2.2.4 The South African Qualifications Authority Act, 1995

The South African Qualifications Authority Act (1995)⁶ provides for the development and implementation of a National Qualifications Framework (NQF) and for the establishment of the South African Qualifications Authority (SAQA). The NQF establishes an integrated national framework for learning achievements. The main aim is to enhance access and mobility as well as quality in education and training. Specific objectives of the NQF are:

- ¥ To create an integrated national framework with common standards for learning achievement;
- ¥ To facilitate access to, and mobility and progression within education, training and career paths;
- ¥ To enhance the quality of education and training;
- ¥ To accelerate the redress of past unfair discrimination in education, training and employment opportunities; and
- ¥ Contribute to the full personal development of each learner and the social and economic development of the nation as a whole.

The key functions of the South African Qualifications Authority include:

- ¥ Setting of standards necessary to obtain a qualification for the various professions;
- ¥ Administering the NQF;
- ¥ Accrediting standards setting bodies; and
- ¥ Recognising bodies which monitor education and training outcomes.

The South African Qualifications Act adopts an eight-level National Qualifications Framework (NQF). The eight levels are grouped into three broad bands, namely:

- ¥ General Education and Training: Level 1 including 4 Adult Basic Education and Training (ABET) sub-levels;
- ¥ Further Education and Training: Levels 2 - 4; and
- ¥ Higher Education: Levels 5 - 8.

Figure 3 illustrates the structure adopted in the NQF.

2.2.5 The Admission Policy for Ordinary Public Schools 1998

In Section 3 of the South African Schools Act (Act 84, 1996), it is stipulated that every learner must attend school "from the first school day of the year in which such learner reaches the age of seven years until the last school day of the year in which such learner reaches the age of fifteen years or the ninth grade, whichever occurs first".

The right of a child to be admitted to the public school is stated in the South African Schools Act, in Section 35 (1):

"A public school must admit learners and serve their educational requirements without unfairly discriminating in any way."

Provisions for conditions of admission of learners to public schools as well as age grade norms are further elaborated on in the Admissions Policy for Ordinary Public Schools (Department of Education, 1998f) that came into effect in January 2000. By Grade 9, which marks the end of compulsory basic education, the learner should be 15 years old. Recognising that the problem of over-age learners will not be eliminated immediately, the policy states that the onus will be on schools to place learners who are above the normal age for a grade in a 'fast-track facility' to help bring them in line with their peer group. Learners over the age of 16 wanting to attend school will be referred to adult education centres. To improve the sluggishness of the system, the new Assessment Policy came into effect in January 1999 stating that learners will be allowed to repeat a year only once in each phase of the school cycle. This policy aims at improving the internal efficiency of the system by curbing the high repetition rate that presently characterises the system.

2.2.6 Summary

This section has demonstrated how the education system was ravaged by apartheid policies. However, the installation of a democratically elected government in 1994 has brought vital change. Besides the broad policy and legislative initiatives discussed above, there are other major developmental policies initiated since 1994. Specific reference to these initiatives will be made when discussing progress towards attainment of EFA goals in subsequent sections.

2.3 SOUTH AFRICAN EDUCATION SYSTEM

2.3.1 South African Education Systems Pre-1994

A number of officially sanctioned practices influenced education development prior to 1994. There are two policies, which influenced the structure of the education system during the apartheid era. The first was the Bantu Education Act of 1953, which stipulated that blacks would not be over-qualified for positions not envisaged for them. The second was the National Education Policy Act of 1967, which promoted a racially and culturally segregated and differentiated education system based on the ideology of Christian National Education. The result was 18 different Education Departments, as illustrated in Figure 4. The first challenge faced by the 1994 democratically elected government was therefore to create a single amalgamated and integrated education and training system.

As far as the various levels of education were concerned, the general school phase included Sub-standards A and B and then Standards 1 to 10. Schools were departmentally controlled. A higher education sector existed with all universities and technikons outside of the four so-called Independent States under the control of the National Department of Education. Between the school and the higher education sectors, education and training also took place in an undefined sector. This sector included various publicly funded colleges, private providers and work-based education and training, with responsibility largely borne by various National and Provincial Education Departments, but also by the Department of Labour and private providers, including companies (Department of Education, 1998a).

2.3.2 Current Education System Structure

Since 1994 the education system has been restructured to address the geographical, political and occupational needs of the country more effectively. The new constitution made provision for nine provinces, each with its own education department tasked with delivering education in accordance with the national education policy. The Department of Education coordinates education at the national level, and is mainly responsible for policy formulation and monitoring of implementation. Implementation of policies takes place at provincial, district and local levels.

Figure 4: Pre-1994 Education Structure in South Africa

Chapter 3

Methodology

A set of 18 core EFA indicators were selected by a Technical Advisory Group which was constituted from representatives of the Convenors of the International Consultative Forum on Education for All (UNDP, UNFPA, UNESCO, UNICEF and The World Bank). These indicators were recommended to all countries for use to assess the situation of basic education. The assessment exercise was planned to make use mainly of data that all countries should be collecting and reporting according to international agreements. For example, data needed for 13 out of 18 core indicators are already requested by UNESCO in its annual education statistical questionnaires to Member States. Particular attention is given, however, to reporting statistics on learner enrolment by grade and age.

The 18 indicators are defined as follows:

¥ Early Childhood Care and Development:

Indicator 1: Gross enrolment in early childhood programmes (expressed as a percentage of the official age group or 3-5 years).

Indicator 2: Percentage of new entrants to primary Grade 1 who have attended some form of organised early childhood development programme.

¥ Primary Education:

Indicator 3: Apparent (Gross) intake rate (i.e., new entrants in primary Grade 1 as a percentage of the population of official entry age).

Indicator 4: Net intake rate: new entrants to primary Grade 1 who are of the official primary school-age as a percentage of the corresponding population.

Indicator 5: Gross enrolment ratio (enrolment in primary school expressed as a percentage of the population which corresponds to the official primary school age group).

Indicator 6: Net enrolment ratio (enrolment of the population of the official primary school age group expressed as a percentage of the population which corresponds to official primary school age group).

Indicator 7: Public current expenditure in primary education (a) as a percentage of GNP and (b) per pupil, as a percentage of GNP per capita.

Indicator 8: Public expenditure on primary education as a percentage of total public expenditure on education.

Indicator 9: Percentage of primary school teachers having the required academic qualification.

Indicator 10: Percentage of primary school teachers who are certified to teach according to the national standards.

Indicator 11: Pupil/teacher ratio.

Indicator 12: Repetition rates by grade.

Indicator 13: Survival rate to Grade 5.

Indicator 14: Coefficient of efficiency. ¥ Learning and Achievement Outcomes:

Indicator 15: Percentage of pupils having reached at least Grade 4 of primary schooling who master a set of nationally defined basic learning competencies.

Indicator 16: Literacy rate of 15-24 year olds.⁷

¥ Adult Literacy:

Indicator 17: Adult literacy rate (percentage of population aged 15+ that is literate).

Indicator 18: Literacy gender parity Index (ratio of male to female literacy rates).

No specific indicators have been developed for two of the components of basic education (i.e., Training in Essential Skills and Education for Better Living) mainly due to the difficulty of collecting data pertaining to these components.

The EFA Technical Guidelines suggest that countries participating in the assessment may utilise additional indicators to add value to their country reports. It is also suggested that where data are not available to compute certain indicators, proxy measures may be used.

3.1 DATA SOURCES

The data used in this report primarily come from:

¥ The 1999 South Africa Monitoring Learning Achievement (MLA) Survey;

¥ The 1997 Education Management Information System (EMIS) dataset;

¥ The 1996 South African Population Census, including the 10 percent sample dataset; and

¥ The 1996 Schools Register of Needs dataset.

Other important sources of data are NGOs and research institutions, such as EduSource, the South African Institute of Race Relations, the Research Institute for Education Planning (RIEP) at the University of the Orange Free State and the Human Sciences Research Council (HSRC).

Due to the paucity of reliable information on certain components of basic education in South Africa, some indicators could not be estimated, these being:

¥ Indicators 1 and 2 (ECD component); and

¥ Indicators 3, 4, 13 and 14 (Primary Education component).

Data for computing the basic learning competency indicator (Indicator 15) were obtained from the South Africa MLA Survey.

3.2 MONITORING LEARNER ACHIEVEMENT SURVEY

The South Africa MLA Survey was conducted in August 1999 under the auspices of the National Department of Education. The main objective of the survey was to obtain information on learning achievement and outcomes at the primary school level and to determine factors that impact on the quality of teaching and learning.

A 2 percent nationally representative stratified random sample of 400 primary and combined schools⁸ was drawn, targeting Grade 4 learners, their parents, principals and educators. Competency instruments for assessing literacy, numeracy and life skills learning were administered to Grade 4 learners, yielding about 11,000 completed instruments. In addition, structured questionnaires were administered to parents,

principals, educators and learners to solicit information on the management of schools, calibre of educators, profile of learners and the socio-economic environment of the school community.

Chapter 4

Adoption of Education for All in South Africa

In this chapter initiatives taken by the democratic government of South Africa aimed at transforming the education system toward the achievement of basic education for all within the EFA dimensions are discussed. Also discussed are cooperation and partnerships for the achievement of EFA goals and the financing of basic education.

4.1 TRANSFORMATION OF THE EDUCATION SYSTEM

4.1.1 Principles Underpinning Education Transformation

The South African Constitution guarantees equal access to basic education. This has necessitated the identification of values and principles which should drive national policy for the reconstruction and development of education and training. Therefore, the key principles that underpin education policy development articulate both the government's political commitments to basic education provisioning, and a creation of an enabling environment to enhance the transformation process. These principles are:

¥ Equity and Redress, especially in the equitable provision of finances and resources;

It is essential to redress imbalances generated through historical inequalities in education provision, including the promotion of gender equality and the advancement of the status of women. At the school level this is now being addressed. Ways have been found to encourage children to attend schools that formerly excluded them. To an appreciable degree, schools have opened their doors, and where necessary, expanded their educational programmes to accommodate all children, irrespective of race and/or culture.

One way of measuring the success of the system in achieving the removal of injustices and obstacles in accessing schooling is by analysing which children are being admitted to and are continuing to attend school. For example, the implementation of early childhood development needs to be targeted to all communities, but especially those communities where this facility has never been available before and those where significant proportions of children in Grade 1 are under-age.

¥ Access to basic education opportunities for lifelong learning;

The basis for the state's commitment to compulsory basic education is to be found in the fundamental right of all persons to access basic education. Also the Ministry of Education's policy for compulsory education provides one of the necessary elements of the framework within which the constitutional rights of the child can be assured.

Improving access to basic education has two main components. Firstly, capacity must be expanded. Secondly, there is a need to understand and, where possible, address the barriers that prevent some children from going to school. Long distances to school and lack of transport, hunger, disability, household chores, (e.g., care of younger siblings and herding), lack of parental guidance, homelessness, inability to pay school fees and inability to purchase uniforms are all factors that may prevent children from enrolling and effectively participating in school.

¥ Quality, in terms of providing learners with learning opportunities of an acceptable standard;

The achievement of basic education for all has both quantitative and qualitative dimensions. Any suitable definition of basic education needs to embrace not merely the proportion of eligible children attending school, but also the nature and quality of schooling offered. The implementation of the compulsory phase implies not merely securing formal attendance at school, but also ensuring that sufficient and quality material and human resources are made available to schools. For example, Government must ensure that educators are well prepared to facilitate the learning process.

The Ministry of Education considers the provision of quality free education as a public responsibility to be largely funded by the state at an affordable and sustainable level. This implies, nonetheless, that certain education costs are to be borne by parents and learners.

¥ Efficiency, to ensure optimal value for the considerable financial and other resources, the state and the private sector must invest in education;

¥ Democratic participation in the governance and management of education institutions and the sub-system as a whole;

Without democratic governance structures representing all principal stakeholders in learning institutions, there is no prospect that the provision of an acceptable level of general education for children from state resources can be properly managed, sustained and enhanced.

¥ Sustainability of development initiatives, so that they will contribute to overall transformation in the long term; and

¥ Relevance of education to the needs of the economy and individuals' vocational aspirations, as well as broader social and cultural values.

To a large extent, these key principles have influenced the determination of targets and priorities within the broader education transformation agenda. Likewise, the organisational, legislative and governance frameworks of education put in place in 1995 are in keeping with these principles.

Whilst it is recognised that policy implementation is still in its infancy, a sound foundation for building an appropriate education system for the 21st century has been laid within the current legislation and policy frameworks.

4.1.2 Creating an Enabling Environment for Implementation

A number of initiatives have been instituted by the Government of South Africa to create an enabling environment for the implementation of programmes aimed at improving access to all areas of basic education. Some of the initiatives are discussed below.

Culture of Learning, Teaching and Service (COLTS) Campaign

The apartheid legacy created a climate in schools and other learning sites that is not conducive to effective teaching and learning. To address this problem, the Ministry of Education in 1998 launched the Culture of Learning, Teaching and Service (COLTS) Campaign, which aims at developing a culture of learning, teaching and service conducive to the delivery of quality education throughout the country. This could be achieved by building a positive perception of education and by improving the conditions of schools (Department of Education, 1997e).

The COLTS Campaign is therefore a mechanism to bring massive visibility, urgency and popular participation to the commitment to educational quality throughout the system. It provides a focus for driving behaviour and enforces key values in the education process such as application, commitment, determination to succeed, orderliness, discipline, mutual support, community involvement and ownership.

The objectives of the COLTS Campaign are:

¥ To ensure engagement with COLTS at school level;

¥ To encourage parental participation in institutions of learning at all levels;

¥ To create a safer learning environment; and

¥ To facilitate the development and adoption of a South African Education Charter.

The Campaign is co-ordinated by the COLTS Directorate of the National Department of Education. The Directorate is accountable ultimately to the Heads of Education Departments Committee (HEDCOM) and the Council of Education Ministers (CEM).

The COLTS Campaign is implemented through various projects, as set out below:

¥ Yizo Yizo Media Campaign: It encourages engagement at provincial, district and school levels with issues raised by the television programme Yizo Yizo;

¥ Miracles in Education Project: It aims to provide examples of good practice to help change behaviour towards the achievement of COLTS objectives;

¥ Safer Learning Environments: It emphasises increasing basic safety conditions at the school place and decreasing incidents of crime and violence in and around schools;

¥ Creative Arts Initiative: It develops active engagement with COLTS issues at school level resulting in school improvement plans;

¥ Parental Involvement Project: It supports learning and teaching in learning institutions; and

¥ All Educators and All Learners Component: It will audit current activities to improve educator and learner discipline, commitment and application to work to inform future planning.

Education of Learners with Special Education Needs (ELSEN)

To promote the right to basic education and to ensure equal access by all learners to basic education calls for the removal of all barriers to education. At the beginning of 1997, the National Commission on Special Needs in Education and Training (NCSNET) and the National Committee for Education Support Services (NCESS) were appointed by the Minister of Education to investigate and make recommendations concerning all aspects of special needs and support services in education and training in South Africa. The focus was on the development of education to ensure that the system becomes more responsive to the diverse needs of the different learner populations, and to ensure that the education and training system truly promotes education for all. This investigation was guided by the National Department of Education in conjunction with the National Co-ordinating Committee on Education of Learners with Special Education Needs established in 1995. The main functions of the Committee were:

¥ To assist in managing projects on Education of Learners with Special Education Needs (ELSEN) at a national level;

¥ To build capacity in the provinces to assist the provinces in maintaining the service; and

¥ To co-ordinate the implementation of recommendations concerning ELSEN.

The report of the investigation and the subsequent discussion papers on Quality Education for All: Overcoming Barriers to Learning and Development (Department of Education, 1997a), proposed that all learners with special education needs be admitted to ordinary public schools. This is referred to as the policy of "inclusion" of ELSEN in mainstream education. This implies that the system must change so that schools can accommodate such learners and that the necessary support services be developed. According to these recommendations, only a small percentage of learners would be accommodated in special schools, but this would also be transformed to accommodate diversity. To make this possible, all schools need to have a team of people, including educators, parents and experts, who can provide the necessary support to learners with special education needs. In order to support the initiatives aimed at overcoming barriers, the state is developing legislation to regulate provision of education for ELSEN (Department of Education, 1999a).

National School Building Programme

Since 1994, the Reconstruction and Development Programme (RDP), a programme led by the President, has tackled the backlog of school facilities. This is known as the National School Building Programme which when completed in 1999, will have built 10,000 new classrooms. In 1997, the National Department of Education completed and published the Schools Register of Needs Survey, documenting the facilities of schools in the country, and mapping every school on a Geographic Information System. The data serves as a basis for planning and resource provisioning.

The Departments of Finance and Education have been collaborating in finding a budgetary solution to the problem of accumulated classroom backlogs in predominantly rural provinces with large backlogs inherited from the former homelands. International donor funding has been raised for the third phase of this programme, which targets the Eastern Cape and two other severely disadvantaged provinces for financial support. Many provinces still face a shortage of classrooms and the Department of Public Works estimates that the elimination of classroom shortages could cost the Government nearly R3 billion. Between 1994 and 1996, R1.3 billion was allocated to school building and rehabilitation. The rate of implementation has varied from province to province. Most have concentrated on situations where schools operate with virtually no buildings in order to provide a physical campus for every school. Derelict and dilapidated schools have also been targeted.

4.1.3 Monitoring and Evaluation Monitoring and evaluation of the performance of the educational system is crucial for ensuring that all South Africans receive quality basic education and training. It is also an imperative of the National Education Policy Act, 1996 (Republic of South Africa, 1996b). Section 8 of the Act states that:

The Minister shall direct that standards of education provision, delivery and performance throughout the Republic be monitored and evaluated by the Department annually or at other specified intervals, with the object of assessing progress in complying with the provisions of the Constitution and with national education policy.

To facilitate monitoring and evaluation of the provision of education, the Quality Assurance Directorate at the National Department of Education and quality assurance structures in Provincial Departments of Education were established. In addition, the National Quality Assurance Co-ordinating Committee was set up as a HEDCOM sub-committee to advise HEDCOM on all monitoring and evaluation initiatives and to report to HEDCOM on progress in the implementation of these initiatives.

An effective monitoring and evaluation system requires reliable and comprehensive data from and about all levels of the education system. Because the Department of Education inherited fragmented and unsatisfactory data, it developed a national Education Management Information System (EMIS) in 1996, with the design of a public schools dataset, a national annual school survey form and a computer programme for data processing in co-operation with Provincial Departments of Education. The national EMIS covers a few components of basic education. It will, however, evolve to cover the entire educational system, in particular:

- ¥ The management information system for early child development, adult basic education and training, education for learners with special education needs, further education and training and higher education, including colleges;
- ¥ Link to the Schools Register of Needs Survey, examinations, the state Personnel and Salary (PERSAL) system, census and historical databases; and
- ¥ The promotion of the use of information for management, decision-making, policy and planning.

4.1.4 Early Childhood Development (ECD)

ECD is an umbrella term, which applies to the processes by which children from birth to nine years grow and thrive physically, mentally, emotionally, morally and socially. Defined thus, the majority of pre-school children in South Africa do not receive adequate ECD at the moment. According to the South African Congress for Early Childhood Development, there are between 5.5 and 6.0 million children under the age of six and only 560,000 of these children are accommodated in ECD facilities. It is estimated that about R1 billion is needed to meet the needs of all children under the age of 6 years. In 1994, the National

Department of Education created an Early Childhood Development Directorate responsible for developing an ECD policy framework and planning and mobilising resources in support of large-scale provision of ECD. The National ECD Pilot Project was launched in 1997 after the announcement of the Interim National Policy on ECD in 1996. The aim of the Pilot Project is to conduct research and to develop systems and models for the implementation of new policy to ensure that children eligible for the Reception Year (Grade R) have improved access to quality education programmes (Chisholm et al., 1999).

During 1998, focus was on:

- ¥ The ECD Information Campaign which publicises the programme and informs the participating providers;
- ¥ The ECD Accreditation Committee which establishes the interim guidelines for the accreditation of practitioners;
- ¥ The ECD Research and Monitoring Team which collects information on the impact of the programme and advises on the development of sustainable models for the provision of a publicly funded Reception Year;
- ¥ The Co-ordinating Committee for ECD which advises on, and monitors the implementation of the programme; and
- ¥ Setting up a quality assurance system for the accreditation of ECD practitioners and training agencies.

The ECD Pilot Project has reached 2,800 non-governmental early childhood learning sites serving approximately 70,000 of the most disadvantaged learners. About 3,000 practitioners received fully accredited professional training and orientation in the new curriculum for the Reception Year. The major challenge is in finding adequate financial resources to meet the implementation costs of a compulsory Reception Year. Inter-sectoral work on ECD for children aged 0 - 9 years is a key government priority in 1999 and the Minister of Welfare will be spearheading an ECD Audit. This will be followed by development work on an ECD Bill, since no specific legislation exists to govern early childhood development and learning. All these initiatives seek to expand ECD activities and enhance community interventions.

While budgetary constraints at both national and provincial levels prevent the phased implementation of comprehensive provision for ECD, a range of proposals have been drawn up which look at alternative strategies to fund ECD. These include tax concessions for employers who are willing to support ECD, and greater local government and community responsibility and involvement.

4.1.5 Primary Education

The Constitution envisages a situation where all children have access to and complete primary education. Section 32 of the Constitution states: "Every person shall have the right to basic education and equal access to educational institutions." Taking its cue from this statement, the White Paper (1995) explains that "the right to basic education, to equal access to educational institutions, applies to 'all persons', that is, to all children, youth and adults." "All persons" in this context includes people with disabilities or special learning needs. For children, the right would be satisfied by the availability of schooling facilities sufficient to enable every child to begin and complete a basic education programme of acceptable quality.

For the out-of-school youth and adults, the availability of basic education would be in the form of non-formal education and training programmes appropriate to age and personal circumstances. Attaining this level of availability of opportunity for basic education will be an immense achievement in the reconstruction and development of the country's human resources. Therefore, in the South African context, basic education programmes are flexible, developmental and targeted at the specific requirements of particular learning audiences or groups. Basic education should also provide access to a nationally recognised qualification(s).

4.1.6 Learning Achievement and Outcomes

South Africa adopted a new approach to education and training to ensure that learners have access to quality lifelong education and training at all levels of the education system. This approach, referred to as Outcomes-based Education (OBE), is learner-centred, and oriented towards results and outcomes, thus

enabling learners to productively contribute to the country's socio-economic development (Department of Education, 1997c).

The new pedagogy associated with OBE has been developed into a curriculum framework for learning at school level, referred to as "Curriculum 2005". The National Department of Education launched the new framework in April 1997. Curriculum 2005 was phased in Grade 1 in 1998 and in Grade 2 in 1999. It will be introduced in Grades 3 and 7 in year 2000. The Department of Education provides support for the phased implementation of the new curriculum. A Sub-Committee of HEDCOM which is representative of all partners and key stakeholders advises and guides the curriculum development process and implementation activities. The National Centre for Curriculum Research and Development (NCCRD) was set up to conduct policy research to smoothen the process of implementation of the new curriculum. The NCCRD also seeks to clarify meaning and links between Curriculum 2005 and teacher education, lifelong learning and development and the use of appropriate technology enhanced learning in support of the implementation process. A research base is needed to ensure that the implementation proceeds in a purposeful, coherent and cost-effective way.

The Ministry of Education regards teacher education, including professional education of trainers and educators as one of the central pillars in implementing curriculum change. Interventions have been made resulting in the "Norms and Standards for Educators" gazetted in January 1999 which outlines policy for the qualifications of educators and for the evaluation of these qualifications. The policy indicates how norms and standards for educators can be:

- ¥ Articulated to meet the occupational criteria for employment by the Department of Education, the professional criteria for registration by the South African Council for Educators, and the academic criteria or standards for qualifications to be registered on the NQF;
- ¥ Used to perform the functions of an interim standards generating body; and
- ¥ Used to offer guidelines to providers on how they should design and deliver learning programmes, and use quality assurance criteria to develop their institutions and programmes.

This policy instrument has two major purposes. Firstly, it is used as a vehicle to put forward the Department of Education's vision of teacher development to indicate the norms and standards of competence that should be met by all the teachers and educators. Secondly, the Department of Education uses the norms and standards as criteria by which it evaluates qualifications for employment in education. The quality of the teaching force is an important factor in the achievement of learning outcomes and the role of educators in the assessment of learner performance is critical.

The new Assessment Policy declared in December 1998 introduces continuous assessment as part of the mechanism to monitor quality and standards of performance. Each educator is required to apply a variety of assessment techniques on a continuous basis to ensure that appropriate interventions are made where necessary. The Assessment Policy also makes provision for systemic evaluation at the end of key transitional stages (i.e., Grades 3, 6, 9 and 12), the object of which is to assess progress in complying with the provisions of the constitution and with national education policy. Monitoring learning achievement is an important element in systemic evaluation, as the results are used to promote quality assurance. Education and Training Quality Assurance Bodies accredited by SAQA will also play an important role in monitoring and promoting quality in the entire education and training system.

4.1.7 Adult Literacy

The historic inadequacy of learning facilities and opportunities, especially for black communities, has ensured that a majority of the adult population both in and out of formal employment has had no schooling or only inadequate schooling. The advancement of the provision of Adult Basic Education and Training (ABET) is a constitutional requirement and the Ministry of Education views ABET as a force for social participation and economic development, providing an essential component of all RDP programmes.

The Department of Education created an ABET Directorate in 1996 responsible for the development of an ABET policy framework and for planning and mobilising resources in support of large-scale provision of ABET. In 1996, interim curricula were developed and an ABET campaign which reached 90,000 adult

learners was launched. The National Multi-Year Implementation Plan (NMYIP) outlined the government's plan and commitment to ABET (Department of Education 1997b). The first phase of the NMYIP challenges all players including NGOs, tertiary institutions, publishers, the private sector and trade unions, to set up mechanisms aimed at ensuring sustainable, large-scale delivery of adult education with ownership filtering down to the lowest denominator. Thus, the main organisational principle of the national ABET programme is the building of partnerships between all constituencies with a vital interest in ABET provisioning, including organised labour and business, women's and youth organisations, civics, churches, NGOs, universities, learner associations, media and other stakeholders. The partners are involved in planning, arranging public advocacy, sponsoring research and development and mobilising financial resources for all ABET programmes. A representative national ABET council is expected to be established soon as the authoritative voice of the sector. Legislation for ABET is being prepared and will be finalised in year 2000.

4.1.8 Education and Training in Other Essential Skills

The Government's underlying principle on training in other essential skills is the provision of opportunities in the areas of mathematics, science and technology to prepare South Africans in fields to which in the past they had no access. In the case of science and mathematics education, it was argued that the schools were in dire straits - under-prepared educators were producing successive generations of learners who failed to reach their potential in science and mathematics. Based on successes in the NGO sector where learners who had already written matric examinations were given a "second chance", the Students and Youth into Science, Technology, Engineering and Mathematics (SYSTEM) recovery programme was designed.

The broad aim of SYSTEM is to address the shortage of a technofluent human resource base in South Africa. It aims at increasing the number of students with matric mathematics and science. It also incorporates a teacher education and development programme aimed at addressing the acute shortage of qualified and competent science, mathematics and technology teachers.

A National Task Team, consisting of a National Director and National Co-ordinators for Selection, Finance and Logistics, and Curriculum Development, is responsible for the overall management of the project. The National Task Team liaises with the Department of Education through a Chief Education Specialist, and is accountable to the Director for School Education.

All nine provinces are participating in SYSTEM, which is offered at dedicated sites by specially trained staff. It has its own new curriculum and own recognised certification. It is intended that SYSTEM qualifiers will then proceed to science-based careers in industry, technical colleges, colleges of education, technikons or universities.]

Furthermore, recognising that change in science and mathematics teacher education was also needed, a Diploma in Education for producing a new cadre of science and mathematics educators was proposed as part of SYSTEM. SYSTEM was referred to in the 1997 National Department of Education's Annual Report as the flagship project of the Department (National Department of Education, 1997).

4.1.9 Skills for Better Living

Educational Broadcasting and Print Materials

Radio, television and print materials have been used by the DoE to provide basic education to the general public. A successful partnership with the South African Broadcasting Corporation (SABC) has culminated in the development of an educational broadcasting plan in 1996, following a long consultation process with various stakeholders in the education sector. This partnership has yielded the following programmes:

¥ Educational radio and television programmes supporting all sectors of the education system have been developed;

¥ Innovative programmes have been conceptualised, developed and broadcast, including Take 5, School TV (aimed at Grade R-Grade 3), Yizo Yizo (COLTS drama series) and Educator Express (aimed at educators);

¥ Print support materials for educators and a course for training educators to use multi-media in the classroom, have been developed; and

¥ The development of a South Africa version of Sesame Street, an ECD television series produced by the Children's Television Workshop.

Further Education and Training

The Education White Paper 1 (1995) states that the developmental task of the Further Education and Training (FET) sector is to address the inadequacy of programmes at the senior secondary level and above, both in-school and out-of-school, in the workplace, in other institutions, or by private study. This is central to a successful integrated approach to education and training.

As a result, FET has been planned to provide a purposeful educational experience to learners in the post-compulsory phase, irrespective of age, place and time of delivery. Recognition of Prior Learning (RPL) is an important application of assessment at this level. RPL is intended to provide learners with recognition of existing competence regardless of where, how and when it was acquired. This will assist with appropriate placement on training courses and learning programmes, giving greater mobility in career and learning pathways.

The National Commission on Further Education and Training was established to undertake the research, consulting and planning required to set this level of learning on the transformation agenda. As a result of this process, the Further Education and Training Act, 1998¹⁰ was promulgated. The Act requires that access to further education and training must be ensured for persons who have been marginalised in the past, such as women, the disabled and the disadvantaged, and to develop strategic plans which, inter alia, must address past imbalances in respect of race, gender and disability.

Consensus has been reached between the Departments of Education and Labour and other stakeholders around a conception of lifelong learning which will ultimately be achieved through the National Qualifications Framework (NQF). Learners can progress through an integrated education and training system from non-literacy through accessing general, further and higher education and training along a continuum of learning opportunities presented in the NQF. The policy document on ABET emphasises that for adult learners, it is important that lifelong learning includes both the formal and developmental approaches to lifelong learning. This ensures that learners can use the knowledge, skills, values and attitudes that they have gained through their lives and experiences.

The Department of Labour's Skills Development Act, 1998, together with the FET Act, provide the legislative basis for "a progressive re-orientation of education and training towards the needs of the society and the economy, and a major re-conceptualisation of funding sources for the sector" (Department of Education, 1999b: 21). Effective implementation of these Acts should improve employment opportunities for a large number of unemployed young men and women.

National HIV/AIDS Policy

In response to the high prevalence of HIV/AIDS in South Africa, particularly among the youth, the Department of Education, developed a national policy on HIV/AIDS for learners and educators in public schools and for students and educators in further education and training institutions (Department of Education, 1999c). This is part of the broader national HIV/AIDS strategy aimed at addressing the HIV/AIDS pandemic. The Minister of Education published the policy in August 1999, and the Ministry of Education will provide leadership during its implementation in educational institutions across the country.

The policy seeks to contribute towards promoting effective prevention and care within the public educational system context, and focuses on providing accurate information on:

¥ The nature and risk factors of HIV infection and AIDS;

¥ Precautionary measures;

- ¥ The obligation resting on school and college communities to avoid discrimination against infected persons;
- ¥ The rights and responsibilities of infected persons; and
- ¥ Assistance to infected persons.

Life Skills and HIV/AIDS Education Project

Prior to the development of the HIV/AIDS policy, the DoE began implementing the Life Skills and HIV/AIDS Education Project (Department of Education, 1997d and 1998d). The project has prepared learning programmes and materials in collaboration with the Department of Health. By the end of 1998, the programme had trained 840 master trainers and more than 10,000 educators in secondary schools. A rapid assessment of the project will soon be carried out to evaluate its implementation in schools. Results of the assessment will form the basis for extending the project more broadly. A pilot project on the same theme has been implemented in selected primary schools in the Northern Province and the Free State. Plans are also underway for its expansion nation-wide.

4.2 COOPERATION AND INVESTMENT IN EFA

In order to achieve the goal of providing quality basic education for all South Africans, it is necessary for government to redress the gross historical inequities in the provision of education perpetuated by the apartheid regime. It is therefore apparent, now more than before, that the equitable provision of quality basic education requires the cooperation of various role players in education, training and community development. To this end, the National Department of Education has forged close relationships and partnerships with other government departments, provincial ministries and departments, local governments, the business community, NGOs, the international donor community and other role players and stakeholders. These partnerships are discussed below.

Provincial Departments of Education and Other Government Departments

The Constitution has vested substantial powers in provincial legislatures and governments to run education affairs subject to the national policy framework. The essence of the relationship between the national and provincial governments is a cooperative one.

Two bodies have been created to promote cooperation between the national and provincial education departments to enable the Departments to share information and advice, and to collaborate on policy formulation and implementation strategies. The first of these is the Council of Education Ministers (CEM) which comprises the national Minister of Education and the nine provincial Ministers of Education. The second is the Heads of Education Departments Committee (HEDCOM), which consists of the heads of the national and the nine provincial education departments. This body advises the Council of Education Ministers and provides a regular forum for the administrative heads of education departments to consult and collaborate in the interests of the system as a whole. Ordinarily significant investigative work is also undertaken on policy matters that are referred to the CEM by HEDCOM; sometimes using approved HEDCOM Sub-committees and other task teams.

The DoE also co-operates with other government departments in the provision of certain components of basic education. For example, the Department of Education is collaborating with the Department of Health in responding to the HIV/AIDS pandemic by collaborating on the Life Skills and HIV/AIDS Education Projects.

Non-Governmental Organisations (NGOs)

Prior to 1994 NGOs played a crucial role in the provision of basic education in South Africa. The role of NGOs was, however, reversed after 1994 when most funds, which were previously directly channeled to them by international funding agencies were channeled to the Government through bilateral and multilateral agreements. This resulted in most NGOs being financially squeezed, forcing them to either close down or form mergers.

Though the role played by NGOs has substantially diminished, they still play an important part in the provision of basic education, particularly in addressing education needs in ABET, ECD and FET sectors. Their role is particularly crucial because they are usually not constrained by long tendering and other procedures that can constrain government operations. As a result, they tend to deliver a more efficient and effective service.

Private Sector

The private sector played a negligible role in the provision of basic education to the majority of South Africans before 1994. After the 1994 democratic elections, the role of the private sector changed significantly. It is increasingly engaging in the provision of basic education by funding FET initiatives, building schools in needy communities, and supporting the provision of teaching and learning equipment.

International Community

To address backlogs in the provision of basic education, Government has had to intensify its effort to form partnerships with the international community. The Department of Education co-operates with the United Nations system and numerous donors to improve access to basic education. Donors such as DANIDA, USAID, SIDA, CIDA, DfID (UK) the Netherlands, Belgium, and the European Union have been instrumental in the provision of technical and financial assistance to the Department of Education.

Examples of EFA related investments by international donor community since 1994 include the following:

- ¥ The European Union has contributed R89 million for ECD, a schools audit and other programmes.
- ¥ The Government of the Netherlands has made available two grants of approximately R14 million and R18 million respectively, for the provision of learning support materials to facilitate the implementation of Curriculum 2005.
- ¥ USAID has made available US \$5 million over five years for the development of an indigenous version of Sesame Street, in support of the Reception Year component of Curriculum 2005.
- ¥ The Swedish International Development Authority (SIDA) assisted the Department of Education by funding the Schools Register of Needs Survey conducted in 1996. This survey was done to establish a definite geo-referenced database of all primary and secondary schools in the country. The database includes about 300 variables ranging from infrastructure needs to information on school enrolments. All schools in the country have been accurately located and surveyed. The information contained in the database has facilitated Government to make crucial decisions on education provisioning, particularly in addressing imbalances in the provision of school infrastructure and other needs.
- ¥ National Teacher Audits were conducted in 1994 and 1995 with the aid of the Danish International Development Agency (DANIDA).
- ¥ Aid and development programmes for OBE are being organised and implemented at provincial level in all nine provinces. Belgium, the Netherlands, Sweden, the USA and Canada are among the countries that are assisting provinces financially with regard to OBE.
- ¥ During May 1998 the Education Division for Culture and Media in Sweden, for example, sent representatives from all nine provinces on an exchange programme to assist them in improving school library services in the provinces with OBE in mind.
- ¥ The Quality Assurance Audit of 1998 and 1999 carried out at provincial level, commissioned and coordinated by the Department of Education was funded by the UK Department for International Development (DfID).
- ¥ The Canadian International Development Agency (CIDA) has funded several human resource development and management initiatives of the Department of Education. For example, in 1998 R633,713 was allocated to the Education Human Resource Capacity Building programme.

4.2.1 Investment in EFA by Government

The South African education budget has always been inherently inequitable. To deal with the equity issues new funding norms for schools were announced in 1998, to be implemented from April 1999. These require education departments to direct 60 percent of their non-personnel and non-capital recurrent expenditure towards the most deprived 40 percent of schools in their provinces. On the other hand, the most endowed 20 percent of schools should only receive 5 percent of the resources. In addition, all learners are to be provided with a minimum package of teaching and learning materials and poor parents are to be exempted from paying school fees.

In keeping with its aim of prioritising the provision of basic education, Government increased education expenditure by 89 percent between 1991 and 1996. The goal of achieving racial equity and redress has been at the core of its attempts to reform expenditure patterns. In order to have an equitable distribution of resources while operating with limited financial resources, Government has adopted a new approach of not expanding the budget but rather to reallocate it to less resourced provinces and to predominately black schools, so as to achieve equal learner-educator ratios. It should be noted that some provinces are still overspending on their budgets and have had to cut back on teaching and learning support materials and in crucial areas such as adult basic education.

Despite Government's decision not to increase expenditure on education, there is pressure for additional spending on education. This arises from four sources:

¥ **Redress.** Addressing former inequalities between black and white education is still a priority and a need. The provision of classrooms and educational materials and aids is in need of urgent attention. According to the 1996 Schools Register of Needs Survey (HSRC et al., 1997) there was a shortfall of 57,500 school classrooms at the time of publication. Between 1994 and 1996, R1.3 billion was allocated to school building and rehabilitation. The programme was due for completion in all provinces during 1999. International donor funding has been raised for a third phase of this programme.

¥ **Extended and New Services.** The Government's human resource development programme involves major extensions of educational services and the introduction of new services. Among the most important of these are the phased introduction of free and compulsory general education (Grade R to Grade 9), the Primary School Nutrition Programme, and the launching of ABET and ECD programmes.

¥ **Demographic Factors.** Population growth of around 2 percent per annum impacts on annual demand at Grade 1 level and has a continuous ripple effect throughout the system. The current trend is that about half a million new learners enter the system annually.

¥ **Rationalisation.** Reorganising the previous 18 ethnically based departments and services into nine provincial departments involved massive management and service changes.

In summary, it should be pointed out that the transformation of an education system is a major task involving both policy and legislation. The success or failure of the system will be measured against the contribution it has made towards the betterment of lives of all the peoples of the country.

From the previous discussion it is clear that the necessary restructuring has taken place, policy changes have been effected and legislation is in place to provide a framework to guide change in access, equity, quality and democratic governance. However, to be able to effectively measure the impact of these changes, the situation must be scrutinised at grassroots level - where education and training are taking place.

Graphic (South African learners)

Chapter 5

Education Policy Implementation and EFA Core Indicators

An examination of the suggested set of 18 core indicators and other relevant measures was a necessary step in assessing progress towards EFA goals and targets. However, the dearth and paucity of reliable data on a number of indicators has limited this examination. Consequently, the discussion of early childhood care and development is excluded from this analysis since no data were available to compute the enrolment ratios for ECD programmes. Even when data on pre-primary learners in public schools were available, the poor quality of the data did not facilitate a meaningful discussion on ECD programmes. There is also insufficient information to facilitate discussion of the two dimensions: training in other essential skills and education for better living. For this reason, these dimensions are also not discussed.

It should be noted that because the implementation of most EFA initiatives in South Africa is at its early stages, the impact is still not known. As a result, this chapter will present a situation analysis of EFA implementation, as well as highlight the nature and cause of disparities in the provision of basic education where they exist.

5.1 EXPANSION OF THE EDUCATION SYSTEM

The expansion of the education system has been swift in many ways. The number of teachers grew considerably, increasing from 145,000 in 1976 to 375,000 in 1996 (Taylor et al., 1999). Table 2 shows that school enrolment has also grown. It increased from 10,099,214 in 1991 to 12,071,355 in 1998, representing an annual growth rate of 2.8 percent. Growth in school enrolment varies substantially by province (see Figure 5). It is highest in KwaZulu-Natal and Mpumalanga (3.9 and 3.4 percent, respectively) and lowest in the Northern Province (1.5 percent).

The decrease in primary school enrolment between 1996 and 1998 may be due in part to the implementation of stricter admission controls for Grade 1 learners, in line with the official primary school entrance age.

There has also been an increase in the number of schools in the country (Taylor et al., 1999), though there is uncertainty on the current number of schools as different data sources give different figures. The Schools Register of Needs (HSRC et al., 1997) recorded 27,276 schools in the country, 79 percent of these being primary and combined schools.

Table 2: School Enrolment by Province, South Africa, 1991-1998

Figure 5: School Enrolment Annual Growth Rates by Province, South Africa, 1991-1998

The Eastern Cape and KwaZulu-Natal have the greatest share of primary and combined schools. The percentage of schools in these provinces is 23.4 and 18.7 percent, respectively (see Table 3). This is to be expected as these provinces have the highest share of the population aged 6-14, their percentage share being approximately 22 and 18 percent, respectively.

5.2 PRIMARY EDUCATION

5.2.1 Gross and Net Enrolments

Gross and net enrolment ratios¹² have been used to measure access to and completion of primary education in South Africa.

Gross Enrolment Ratios

South Africa's gross enrolment ratio in primary schools is 96.5 percent (see Table 4), indicating that the education system is able to absorb nearly all its primary school-age population, including those outside the official primary school-age bracket (i.e., 6-14 years). There are substantial differentials in gross enrolment

by gender, the enrolment ratio being higher among males (98.3 percent) than among females (86.3 percent). Gross enrolment gender disparities are more pronounced in some provinces compared to others, such as the Northern Province and Mpumalanga.

Table 4 shows large variations in enrolment ratios by province, with the Eastern Cape and KwaZulu-Natal having the highest gross enrolment ratios (111.9 and 106.8 percent, respectively), and the Northern Cape having the lowest (76.5percent).

The gross enrolment ratios in the Eastern Cape and KwaZulu-Natal exceed 100 percent. This is most likely due to the following reasons:

¥ Under-aged and over-aged children were allowed to register at schools.

Table 3: Number and Percentage Distribution of Primary and Combined Schools by Province, South Africa, 1996

Table 4: Gross and Net Enrolment in Primary Schools by Gender and Province, South Africa, 1997

Data from the South Africa MLA Survey show that the ages of surveyed Grade 4 learners range from 8 years to above 13 years, yet the official age for this grade is 9 years, implying that some learners enter school early or enter late and/or repeat. Late entry was more pronounced in the Eastern Cape (26 percent) and North West (18 percent). These provinces had the largest proportion of over-aged Grade 4 learners (i.e., aged 13 years and above).

Figure 6: Gross and Net Enrolment Ratios in Primary Schools by Province, South Africa 1997 (Source: Table 4)

It is not uncommon for under-aged children to sometimes "accompany" their older siblings at the start of the school year, and eventually get absorbed by the educational system. It is also common practice in rural communities for children to enter school late due to the fact that they have to assist their parents or relatives (e.g., boys herding cattle, girls caring for younger siblings).

¥ Many learners repeat one or more grades, thus exceeding the official age for the grade.

The relatively low gross enrolment ratios in Gauteng and the Western Cape (84.3 and 83.9 percent, respectively) may be explained by the fact that age disaggregated data were not available on independent (private) schools¹³ yet Gauteng in particular has relatively high enrolment in these schools. The omission of data from these schools may have then resulted in the under-estimation of the gross enrolment ratios. The enrolment statistics should thus be interpreted with caution.

These findings point to the need for stricter regulation on primary school entry ages, especially in rural schools. This will free spaces for learners in the official primary school age group. Enforcing age requirements may be difficult unless serious efforts are made to offer Reception Year (Grade R) schooling.

Net Enrolment Ratios

The net enrolment ratio is a more precise measure of participation and is generally lower than the gross enrolment ratio because it measures the extent of participation of the official primary school age group. The net enrolment statistics presented in Table 4 above indicate that universal primary education for the official primary school age group has not yet been achieved, with the national net enrolment ratio being 87.1 percent. One should caution that the low enrolment ratio might have been affected by the underestimation of enrolments due to the exclusion of independent schools data. Provincial net enrolment disparities are significant, while gender disparities are not. The net enrolment ratio exceeding 100 percent in KwaZulu-Natal is an indication of inconsistencies in either enrolment or population data, though the former is more plausible.

5.2.2 Public Expenditure on Primary Education

According to Table 5 there has been an increase in spending on the education system, with expenditure increasing from R33.5 billion during the 1995/96 financial year to R44.1 billion during the 1997/98 financial year. The rate of growth of education expenditure was, however, higher during the 1995/96 to 1996/97 financial period than during the 1996/97 to 1997/98 period.

The proportion of the total budget allocated to education has virtually remained constant between 1995 and 1998, averaging 22 percent (see Table 5). The highest percentage allocation to education (22.8 percent) was during the 1996/97 financial year. Similarly, the percentage of the Gross Domestic Product (GDP) allocated to education was highest during the 1996/97 period (7.5 percent).

Public expenditure on personnel is generally high in South Africa. Reduction of this expenditure is one of the Government's goals. Education Departments have made it a priority to reduce spending on personnel costs from 89 percent of provincial education expenditure in 1997/98 to 85 percent by 2005. This modest reduction would make more funds available for the provision of learner support materials, equipment and other infrastructure as well as for the general improvement of the quality of education.

Provincial Expenditure

Annex 3 shows that education expenditure on the college/school sector varies significantly by province. In 1997/98 KwaZulu-Natal and Eastern Cape had the highest expenditure in this sector. The Northern Cape, which has the smallest share of the population, has the lowest expenditure.

Table 6 and Figure 7 show that there has been a general increase in the per capita public school expenditure in all provinces, with the exception of Western Cape where there was a drastic decrease between the 1996/97 and 1997/98 financial years. This decline coincided with the release of the 1996 Census results, which showed that budget allocations for this province were not proportional to the size of its population.

According to Table 7 and Figure 8, per capita expenditure on primary education in public schools is highest in the Western Cape (R3,740) and Northern Cape (R3,656). The high per capita expenditure in the Northern Cape may be due to the relatively low enrolment figures. Per capita expenditure on primary education is lowest in the Eastern Cape (R1,947), KwaZulu-Natal (R2,008), Northern Province (R2,042) and Mpumalanga (R2,291).

It is argued that expenditure on education cannot be increased as it already comprises more than 6.9 percent of the GDP and 22.1 percent of the total budget. According to the Department of Finance the expenditure on education will be reduced from 6.9 percent of the GDP in 1999/2000 to 6.5 percent in 2001/2002 (SA Institute for Race Relations, 1999).

Table 6: Per Capita Expenditure on Public School Education (in Rands) by Provinces, South Africa, 1995/96-1997/98

Table 7: Expenditure on Public Primary Education (in thousands of Rands), South Africa, 1995/96 to 1998/99 according to Provinces

Figure 7: Per Capita Expenditure on Public School Education (in Rands) by Province, South Africa, 1995/96 - 1997/98 Source: Table 6

Figure 8: Per Capita Expenditure on Public Primary School Education (in Rands) by Province, South Africa, 1995-1998 Source: Table 7

5.2.3 Learner-Educator Ratios in Primary Schools

The average learner-educator ratio in South African public primary schools is 35. This implies that on average each educator has to cater for 35 learners. The learner-educator ratios vary substantially by province (Table 8), ranging from 40 and 39 in KwaZulu-Natal and Mpumalanga, respectively, to 25 in the

Western Cape. It is interesting to note that Western Cape has the lowest learner-educator ratio yet it has the highest budgetary allocation for primary education.

High learner-educator ratios combined with inadequate conditions of teaching and learning including lack of adequate instructional support materials are not conducive for the delivery of quality education. The MLA Survey found that some schools do not have enough classrooms for use by all educators at the same time. As a result, learner-educator ratios exceeding 40 were found. Similarly, crowded and dilapidated classrooms are hindering the implementation of OBE.

The number of educators in independent schools was not disaggregated by school level (i.e., primary and secondary) because many of these institutions cater for both primary and secondary learners. The learner-educator ratios presented in Table 9 therefore represent statistics for both primary and secondary schools, which are not comparable with those of public primary schools presented in Table 8. One would, however, expect primary school learner-educator ratios in independent schools to be significantly lower than those of public schools. It is, nevertheless, interesting to observe that even within independent schools learner-educator ratios vary substantially by province, being about two times as high in KwaZulu-Natal (30), Northern Province (28) and North West (28), than in the Western Cape (14) and Northern Cape (15).

These results imply that the provision of adequate classrooms and the reduction of learner-educator ratios need urgent attention for Government to succeed in providing quality education in South African primary schools

5.2.4 Qualification of Educators

Using the 1997 EMIS data primary school educators were categorised by qualification level, these being:

REQV 10: Grade 12 and no training;

REQV 11: Grade 8 - 11 plus 2 years training;

REQV 12: Grade 12 and 1 or 2 years training;

REQV 13: Grade 12 and 3 years training;

REQV 14: Grade 12 and 4 years training;

REQV 15: Grade 12 and 5 years training;

REQV 16: Grade 12 and 6 years training;

REQV 17: Grade 12 and 7 years training

Educators are considered unqualified if they have a REQV 10 qualification, under-qualified if they have a REQV 11 or 12 qualification and appropriately qualified if their qualification falls within the REQV 13-17 range.

According to Table 10, 74 percent of primary school educators are appropriately qualified to teach, while 24 percent are not. The percentage of unqualified and under-qualified educators is lowest in the Western Cape (10.2 percent) and Gauteng (12.4 percent), while North West (34 percent), KwaZulu-Natal (32.8 percent) and Free State (30.5 percent) have the highest proportion of educators who are either unqualified or under-qualified .

The MLA Survey also found that the utilisation of unqualified and under-qualified educators is a common phenomenon, particularly in rural schools. This practice though, often dictated by a shortage of human resources, impacts negatively on the quality of teaching. It also contributes to the poor performance of learners as well as to low staff morale.

[Table 8: Learner-Educator Ratios in Public Primary Schools, by Province South Africa, 1997](#)

[Table 9: Learner-Educator Ratios in all Independent Schools, by Province, South Africa, 1996](#)

[Table 10: Percentage Distribution of Primary School Educators by Qualification Level and Province South Africa, 1997](#)

5.2.5 Repetition Rates

National and official data are not available on repeater and dropout rates, save for data from former black education departments for the 1990-1993 period. MLA Survey data have been used to derive more recent statistics on repeater rates.

Table 11 shows that repetition and dropout rates were highest in Grade 1 though there was a slight decline in the rates between 1990 and 1993. Differentials by grade are more pronounced for dropout rates.

Results of the MLA Survey shown in Table 12 depict that high repeater rates in Grade 1 still persist, and this phenomenon is common in all provinces. On average 17 percent of Grade 4 learners repeated one or more grades. The survey also found that repeater rates are higher among boys than girls.

With the recent introduction of OBE and the accompanying Assessment Policy,¹⁴ learners will not be permitted to repeat each phase more than once. One thus expects the pattern of repetition rates to change significantly once the policy is fully implemented.

5.2.6 Out-of-School Children

The level of non-school attendance by eligible children is another measure of access to basic education. In South Africa, a significant proportion (i.e., 16 percent) of children 6-14 years of age¹⁵ are out-of-school though they should be attending in terms of the country's education acts and policies. This finding is in line with the earlier observation made when examining enrolment ratios that universal primary education has not yet been achieved. Disparities in the proportions of out-of-school children vary by place of residence, population group and gender.

Place of Residence

A provincial comparison shows that there are large disparities in non-attendance. Table 13 shows that proportions of out-of-school children are highest in the least developed and poorest provinces, the non-attendance rate being 18.8, 18.0 and 17.8 percent in the Eastern Cape, Northern Province and North West, respectively. The non-attendance rate is only 9.9 percent in the Western Cape.

[Table 11: Repeater and Dropout Rates \(Percent\) for Black Education Departments, South Africa, 1990-1993](#)

[Table 12: Distribution of Grade 4 Learners by Number of Years Spent in Different Grades, by Province, South Africa 1999](#)

Table 13 also shows that non-attendance is distributed unevenly by rural/urban residence. It is highest in rural areas (19.1 percent) and lowest in urban areas (11.4 percent). Rural/urban disparities are very huge in the Eastern Cape, Northern Cape, KwaZulu-Natal, North West and Northern Province (see Figure 9). In these provinces non-attendance is about two times higher in rural areas than in urban areas.

Population Group

The prevalence of out-of-school children also varies significantly by population group (see Table 13). It is highest among Africans (17.3 percent) and lowest among Indians/Asians (4.5 percent).

Gender

Gender inequalities in non-school attendance exist though they are not vast (see Table 13). Slightly more boys (16.6 percent) are out-of-school compared to girls (14.9 percent).

In view of the above, strategies aimed at improving access and participation in basic education should give the highest priority to African children and children residing in the rural areas, especially in the rural areas of the Eastern Cape, Northern Cape, KwaZulu-Natal, North West and Northern Province.

5.2.7 Factors Affecting the Provision of Quality Primary Schooling

An understanding of the impact of the teaching and learning environment of schools on the quality of teaching and learning cannot be over-emphasised.

Table 13: Percentage of Children Aged 6-14 Out-of-School by Various Background Characteristics, South Africa, 1996

Taylor et al., (1999) argue that learning is affected by the material conditions under which it occurs. The District Development Support Programme baseline study conducted in four provinces (Northern Cape, Eastern Cape, KwaZulu-Natal and the Northern Province) identified "poor physical infrastructure and lack of learning and teaching materials as key factors that hinder improvement in learning and teaching" (Paul Musker and Associates, 1999: 42).

Figure 9: Percent of Children Aged 6-14 Out-of-School by Province and Rural/Urban Residence, South Africa, 1996 Source: 1996 Census - 10 percent sample

In this section the physical environment of schools and the provisioning of teaching and learning materials in South African primary schools are discussed. Data on the former are drawn from the 1996 Schools Register of Needs (HSRC et al., 1997).

Physical Environment of Schools

Most South African primary and combined schools have no access to proper sanitation facilities (see Table 14). Nearly half of the schools use pit latrines which are often inadequate in number resulting in high utilisation rates. These facilities are often dirty and smelly posing significant health hazards to learners and educators alike. An additional 13.5 percent of schools have no sanitation facilities at all and there are some schools (1.5 percent) that use buckets which are highly dangerous to health.

The majority of primary and combined schools (56.2 percent) have buildings that are not wired and have no electricity supply (Table 16). Seeing conditions in the classrooms of these buildings may be hampered by poor natural lighting (too much or too little). Poor seeing conditions are a known impediment to learning. Only a third of the schools have electrified buildings. This implies that most schools cannot use teaching and learning aids that require the use of electricity.

Table 14: Percentage Distribution of Primary and Combined Schools by Toilet Type, South Africa, 1996

Table 15: Percentage Distribution of Primary and Combined Schools by Water Supply, South Africa, 1996

Table 16: Percentage Distribution of Primary and Combined Schools by Power Supply, South Africa, 1996

Table 17: Percentage Distribution of Primary and Combined Schools by Building Conditions, South Africa, 1996

The condition of school buildings in many South African schools is not conducive to teaching and learning. The 1996 Schools Register of Needs study found that about 5 percent of primary and combined schools had buildings that were not suitable for education, while another 12.5 percent had buildings that needed urgent attention (see Table 17). The condition of buildings was the poorest in the Northern Province and KwaZulu-Natal, where 41 and 23 percent of the schools, respectively, either needed urgent attention or were not suitable for teaching and learning.

Access to Learning and Teaching Materials

Access to appropriate teaching and learning materials is one of the most important factors in improving the quality of teaching and learning. The materials must not only be accessible but used effectively as well.

The majority of South African schools do not have sufficient education materials to support teaching and learning, and in particular the implementation of Curriculum 2005. This is despite the commitment by Government to provide high quality and progressive learning materials (Karlsson and Gule, 1999; Paul Musker and Associates, 1999; and Vinjevold, 1999). Another study found that almost three-quarters of sampled sites do not have sufficient educational equipment in relation to the number of learners and slightly more than half of the sites have books available. This was found to reflect in low results for literacy assessment. (Khulisa Management Services, 1999).

Research studies conducted nationally under the auspices of the President's Education Initiative (PEI) project in 1998 found that textbooks were generally available at schools although not always effectively and sufficiently used (Vinjevold, 1999). Vinjevold argues that teacher development programmes should make clear the difference between the role played by textbooks (which frame the learning programme) and workbooks and worksheets as well as activity manuals (those which provide support and revision material in favour of the learning programme). The PEI studies also found that very few educators use textbooks in their classes in any systematic way. This was the case even when textbooks were available at schools. The District Development Support Programme baseline study also found that late or non-delivery of ordered learning materials and stationery impacted negatively on the quality of teaching and learning (Karlsson and Gule, 1999 and Paul Musker and Associates, 1999).

These findings point to the urgent need for adequate and timely provisioning of materials in schools if the implementation of the new curriculum is to be successful.

HIV/AIDS

An estimated 3,6 million people or 8,6 percent of the South African population were HIV positive towards the end of 1998. According to international projections this figure will rise to approximately 15 percent of the population in 2001. The influence of HIV/AIDS will also be felt in the education sector. The impact will be on both the demand and supply of education. HIV/AIDS does not only affect the number of learners and subsequently the demand for educators, but also the educational needs. HIV/AIDS will be a key issue and priority for the Department of Education in the short and long-term.

5.3 LEARNING ACHIEVEMENT AND OUTCOMES

The discussion that follows is based on the results of the South Africa MLA Survey which determined the competencies of Grade 4 learners in terms of functional literacy, numeracy and life skills tasks.

5.3.1 Literacy Task

The majority of surveyed Grade 4 learners (47.1 percent) obtained scores for the literacy task that range between 25 and 50 percent (see Table 18). A very small proportion of the learners demonstrated a high level of competency in the literacy task, with only 12.8 percent of learners obtaining 75 percent or higher. About 13 percent of the learners achieved very low levels of performance (i.e., scoring less than 25 percent). On average learners obtained 48.1 percent in the literacy task.

Performance levels vary substantially by province. Western Cape (30 percent) and Gauteng (28.9 percent) have the largest proportion of learners that obtained 75 percent or higher (see Table 18), resulting in high average performance scores (60.9 and 60.7 percent, respectively) as shown in Figure 10. Mpumalanga, on the other hand, had the poorest performance in the literacy task, with an average score of 33.2 percent. In this province nearly a third of the Grade 4 learners (31.5 percent) obtained scores that are below 25 percent, indicating that Mpumalanga Grade 4 learners have not adequately mastered competency in literacy.

No significant gender differences in performance in the literacy task among Grade 4 learners were observed (see Table 18).

5.3.2 Numeracy Task

Numeracy levels are another indicator of learning achievement. In a numeracy assessment a large proportion (44 percent) of Grade 4 learners scored below 25 percent for the numeracy task, while only about 2 percent obtained scores in the 75-100 percent range (see Table 19). The average score obtained for the numeracy task is 30 percent, which is much lower than the average literacy score of 48.1 percent (see Figure 10). This implies that South African children have mastered the literacy task better than the numeracy task.

Figure 10 also shows that Gauteng and Western Cape Grade 4 learners also obtained the highest average numeracy task scores (36.5 and 37.9 percent, respectively), while Mpumalanga obtained the lowest score (22.6 percent). Nearly two thirds of Mpumalanga learners obtained scores that are below 25 percent, a situation that is not acceptable at all if learners are expected to perform effectively at higher levels of learning.

As with the literacy task, there are no significant gender differentials in the levels of performance in the numeracy task (Table 19).

5.3.3 Life Skills Task

More than half of Grade 4 learners (54 percent) obtained scores that are between 25 and 50 percent for the life skills task, while a very small proportion (6 percent) obtained 75 percent or more, the average being 47.1 percent (Table 20 and Figure 10). The level of performance of Grade 4 learners in the life skills (47.1 percent) task is very similar to that of the literacy task (48.1 percent), both being significantly higher than the performance in the numeracy task (30 percent).

Average performance scores for the life skills task vary by province though the differentials are as large as those on the literacy task. The Western Cape (55.7 percent) and Gauteng (54.1 percent) have the highest scores, whereas the Free State has the lowest score (33.7 percent).

5.3.4 Determinants of Poor Learner Achievement

Generally, the performance of Grade 4 learners in all the three tasks is poor. The average task scores are all below 50 percent, which one could consider an average. Several factors could have influenced the performance levels of learners. These are discussed below.

Educational Background of Parents

The MLA Survey found that of the parents interviewed, about 40 percent had not completed primary education. In the majority of the provinces about 60 percent of the parents had either not completed primary education or had not achieved education levels higher than primary schooling.

The educational background of parents is an important determinant of learner achievement. Gauteng and Western Cape, which have the highest performance scores in all the task areas, had the lowest proportion of parents who had not completed primary education. Uneducated parents or parents with little education have difficulty in supporting the learning of their children, if they themselves do not understand the nature of the task in which they should assist (e.g. with homework content). It is, therefore, not surprising that about a third of the parents reported that they did not discuss homework regularly with their Grade 4 children.

Access to Books, Radio and Television

In the MLA sample a very small percentage of interviewed households had access to books. Only about a quarter of the parents were members of a library, and more than 50 percent of them had access to less than 10 books. Where printed materials are lacking, learners have difficulties with reading and spelling. Availability of a radio in the interviewed households was found to be high, while availability of a TV was fair. It is well known that access to radio and television can support educational goals and help to improve general knowledge.

Access to Libraries

The majority of surveyed schools have no access to libraries and this is likely to negatively impact on the quality of teaching and learning. In the absence of school or community libraries, a classroom collection of books can promote reading and understanding. Unfortunately, such collections were only found in about a quarter of the schools.

Teaching Methods

Teaching practices, described by both learners and educators, pointed towards an educator-centred and textbook-centred approach, with little or no involvement of learners. This finding is not surprising because OBE implementation has not yet been phased into Grade 4. The dependency of educators on textbooks and other learning materials is not only illustrated by the time and frequency that were being used in the classroom, but also by the fact that a shortage of instructional materials is an important limiting factor in teaching. The fact that a large proportion of schools do not have electricity or duplicating machines forces educators to utilise the chalkboard method of instruction. Educators also indicated that some time is spent during contact teaching time on activities that are not directly related to teaching. Activities, like lesson planning, meetings and self-study, leave the learners unattended.

Learner Assessment

The MLA Survey found that educators use a wide range of tools for learner assessment. The infrequent use of standardised tests produced outside of the school, the non-appraisal of educator performance and poor support to educators by Department of Education officials contribute to educators being unaware of the norms and standards of teaching. The low frequency of reporting to parents on the assessment of learners' work can be a contributing factor to the limited involvement of parents in school matters.

Loss of Teaching and Learning Time

In almost 20 percent of the schools surveyed more than 20 days of teaching and learning time was lost due to various factors, including late learner registration, class boycotts, educator absenteeism and involvement in cultural activities.

Lack of an Orderly School Environment

Although the majority of learners and educators indicated that they thought things were going well in their schools, there were schools where orderliness and discipline appeared to be lacking. In 33 percent of the schools, principals and educators reported that there is relatively poor school attendance by learners, while 20 percent of the learners indicated that they stayed away from school without good excuses. Absenteeism occurs despite the fact that the majority of schools reported having a policy on school attendance.

Other practices that demonstrate lack of discipline are, classroom disturbances, possession of weapons, sexual abuse and use of alcohol and drugs on school premises. Although such practices were reported to occur infrequently, they nonetheless disrupt teaching and learning and threaten the safety of the school population.

Vandalism and school break-ins are prevalent. It is difficult to conceive of school improvement programmes where the safety and security are threatened. According to Karlsson and Gule (1999: 50) "continual breakages and burglaries (at schools) and fear may have a debilitating effect on the morale of school managers, educators and governing bodies". Vandalism can be seen as a reflection of a dysfunctional relationship between schools and their communities. There is urgent need to mobilise greater community support for schools. In this way, schools and community can work together on more effective security measures. Karlsson and Gule (1999) caution however that security solutions have to be "holistic enough to address broader social ills and do more than merely barricade the schools".

School Management

Many parents found the management of their children's school wanting. Principals also felt that their management ability was poor and that they were not adequately equipped to manage schools. The leadership of many principals was also found to be inadequate. These findings point to the need for the training of principals in basic human and financial resource management. Although all principals received some form of training, a significant number stated that the in-service courses they attended were not very beneficial. This points to the need to carefully assess service providers and their ability to deliver quality training.

Empowerment of School Governing Bodies

According to the South African Schools Act, decision-making is the responsibility of the principal, and of educators, learners and parents as well. According to the survey, the governance structures of the SGBs, comprising the principal and representatives of educators, learners and parents, are in place in the majority of schools. The varied responses on functions of the SGBs and management committees indicate that not all SGBs have undergone training. The contribution of SGBs to the running of school lies more in the effective functioning of schools and not so much in the advancement of learning and teaching.

Low Morale of Educators and Principals

The morale and attitude of educators and principals appears to be low. About 24 percent of educators and 20 percent of principals indicated that they would change to another career if given the opportunity. Both principals and educators, however, thought that society and learners appreciated their work. Nonetheless, excellence in teaching and learning cannot be realised where educators and school managers suffer from low morale and have negative attitudes toward the profession.

5.4 YOUTH AND ADULT LITERACY

This section examines literacy levels and trends in South Africa. Due to the dearth of data on literacy, the 1996 Census data were used to derive functional literacy.¹⁶ Literacy rates for persons aged 15-24 and those aged 15 years and above appear in Annex 4, and summary results presented in [Figures 11](#). Literacy rates of the younger age group reflect recent outcomes of the basic education process.

The analysis of literacy rates shows that about 83 percent of persons aged 15-24 are considered literate. Provincial literacy differentials in this age group are not pronounced, though Western Cape and Gauteng have the highest rates.

Functional literacy is substantially lower in the 15 and above age group than in the 15-24 age group, the rates being 66.6 and 83.3 percent, respectively. This phenomenon is prevalent in all provinces, which is an indication that younger people have had more opportunities to access basic education.

The Western Cape and Gauteng have the highest levels of literacy among persons aged 15 years and above, the functional literacy rate being 76.4 and 75.6 percent, respectively. The Northern Province, on the other hand, has the lowest functional literacy rate (58.9 percent).

According to [Figure 12](#) gender literacy disparities among persons aged 15-24 are small, with the exception of the Eastern Cape where female levels of functional literacy are significantly higher than those of men. [Table 21](#) indicates the priority that is given to youth and adult literacy. More than 2,000 centres and nearly 300,000 learners were involved in 1999 in the ABET programme.

5.5 DISCUSSION

It is evident in the foregone discussion that some major hurdles need to be overcome to realise the provision of basic education for all citizens in South Africa. Given the adverse inequalities perpetuated in the past, an extraordinary effort must be made by all concerned. The national pronouncements made by the Presidency and the Ministry of Education bodes well for education. However, success in ensuring that there is equal access and opportunity for all will depend on grassroots commitment. Local communities need to take ownership of their schools to ensure that government upliftment programmes are sustainable. Furthermore, there has to be an acceptance that inequalities developed during the years of the apartheid

system cannot be redressed overnight. The key is to maintain the momentum that has been and is being created through supportive legislation and positive policies.

Chapter 6

Conclusion and Recommendations

The achievement of education for all in South Africa has to be a well co-ordinated effort in which all stakeholders play different but important roles. This concluding chapter highlights major achievements as well as challenges in pursuing this noble objective. Also identified and discussed are key priorities, which need attention if the provision of basic education is to significantly improve in the future. The identification of priority areas is informed by the foregone discussion. Some of the key priorities have been gleaned from those identified by the Minister of Education in the newly elected government (See Call to Action: Mobilising Citizens to Build a South African Education and Training System for the 21st Century, Department of Education, 1999d).

6.1 MAJOR ACHIEVEMENTS IN THE PROVISION OF BASIC EDUCATION

The discussion and review of achievements made in the area of basic education has to be contextualised within the understanding that South Africa is a nation that has recently emerged from the trauma and devastation of apartheid. Therefore, whatever achievements are discussed in this chapter, it is with acceptance that South Africa is a country in transition and in most instances bedding down a culture of democracy and inclusiveness. For many in policy-making and legislation development inclusiveness is a new phenomenon.

Notable achievements that have been made which directly and indirectly impact on the provision of basic education include the following:

- ¥ Since its off-loading of the apartheid system, South Africa has made remarkable strides in its policy making, institution-building and legislative development. The Constitution and a progressive Bill of Rights entrench the right of citizens to get appropriate basic education. The policy and legislative environment is especially conducive for enhancing education for all. This means that stakeholders need to capitalise on this and hold the relevant structures charged with delivery, including the national government, accountable for the provision of basic education to all citizens.
- ¥ Reforming and transforming the education system resulting in a single Department of Education, where previously there were multiple and disparate departments charged with educating the nation. The entry requirements and the curriculum taught to all learners in public institutions are supposed to be the same.
- ¥ Equitable standards of education provisioning are now expected in all centres of learning, hence the provision of school materials by the Department of Education to all schools.
- ¥ Equal access to schools by learners on the basis of a constitutional requirement that every citizen be accorded the right to basic education. Consequently, no public institution of learning can discriminate or block access.
- ¥ Consultative processes have become common practice when seeking solutions to the education and school improvement processes, with relevant stakeholder groups being included from the outset.
- ¥ The promulgation of the South African Schools Act (1996) has radically changed school governance as well as the resources (human and non-human) that are made available to schools. There is now a lot of emphasis on parental, learner and community involvement in school governance.
- ¥ The state has demonstrated practical commitment to the improvement of the physical infrastructure to enhance learning by making substantial budget provisions for education and launching the National School Building Programme.
- ¥ Establishment of a seamless qualifications system via the South African Qualifications Authority (SAQA) which opens channels for many previously disadvantaged learners to acquire Recognition of Prior Learning and acquire new skills. SAQA unleashed an unprecedented number of activities, especially under the

National Qualifications Framework (NQF), around the provision of education and training, which can only be to the advantage of learners of all ages

¥ Inauguration of quality assurance systems for ensuring quality education for all will go a long way in monitoring programmes in attaining the educational goals of transformation and renewal as well as track impact of policy interventions.

6.2 CHALLENGES AND KEY PRIORITIES

The goal of achieving EFA can only be realised if a multi-pronged approach is utilised to address the challenges that South Africa still faces in providing quality basic education. This approach must of necessity include:

Building the Capacity of Educators and School Managers

The previous system of teacher development did not seek to make all educators competent. Therefore, there is dire need to improve educator competence. There is still a large proportion of unqualified and under-qualified educators in the system. Educators at all levels need sustained and systematic professional development especially as they begin to engage in the Curriculum 2005 process. It must be acknowledged that there are educators who perform exceptionally well, sometimes in very demanding circumstances. One of the challenges in building educator capacity is to identify best practice, disseminate and duplicate it to other areas. School managers need to be developed to effectively manage, facilitate change and lead schools as well as create effective linkages with the immediate community and other stakeholders. Strong school management and leadership can generate confidence, a sense of direction and stability within the school and community as well as fostering more effective school and community relations. The point is that professional development is a long-term value adding intervention, which has to be led and sustained over time for benefits to be realised.

Achieving Desired Learning Outcomes Through Improved Teaching and Learning Methods

The introduction of new school policies, and outcomes-based curriculum has made it imperative for new teaching and learning methods to be used. These developments have had a dramatic impact on educators and school managers. Consequently, educators and school managers need to upgrade their competencies. Training and development of educators has to be done in a systematic manner. It also needs to be supplemented by availability of professional guidance and support from district and provincial education structures.

District and provincial officials must provide professional support to educators and school managers. However, many are not yet proficient in the areas in which they are expected to give advice. This means that coverage of staff development will need to be extended beyond school personnel. Furthermore, if local community structures have an impact on teaching and learning outcomes, equipping personnel in these structures may be prudent also.

Improving Learning Achievement

Learning achievement requires dramatic improvement by employing multi-faceted strategies such as equipping learning centres adequately to achieve quality education, provision of teaching and learning materials, improving the school physical environment, such as, classrooms, furniture, water and sanitary facilities, laboratories and recreational areas. The empowerment of parents through literacy programmes will improve involvement in their children's schooling. Enforcing an orderly school environment with educator and learner discipline through use of appropriate management and school leadership is also likely to result in improved learner performance.

Rehabilitating School Infrastructure

It is quite clear from previous sections of this report that the current school infrastructure is neither conducive for teaching excellence nor learning. There are gross inequities in the type of infrastructure available in centres of learning. There are centres where amenities are in abundance and others where there

is subject scarcity of everything necessary for teaching and learning. However, at the same time there are insufficient classrooms, libraries, laboratories and resource centres in some provinces. Where there are schools, some of these schools have no running water, no sanitary facilities and no electricity. These conditions deprive learners of appropriate learning opportunities and expose them to health hazards. The result is the perpetuation of an unequal society and poverty. Infrastructure rehabilitation or improvement has other spin-offs, i.e., attraction and retention of good educators leading to better achievements and high morale among staff, learners and the community.

Improving Access to Schools

School accessibility by all learners and educators is vital. Having well-designed buildings that are user-friendly to all learners as well as having means of transportation to both educators and learners can facilitate access. Learners who travel long distances to and from school are less likely to have the appetite for individual learning after school. Similarly, educators who have to travel long distances are less likely to routinely engage in thorough lesson preparation in the evening. A learning centre accessible by road is more likely to be visited by education authorities than one where access is through travelling on foot for long distances. Furthermore, an accessible school is likely to have community involvement in its activities. Also learning materials are more likely to be delivered on time to a school that is easily accessible. Cooperation with public works must ensure that roads are built to all schools.

Improving Access to Teaching and Learning Materials and Equipment

Learning centres need to be equipped in such a way that they are suitable to meet the basic requirements of all learners, including learners with certain disabilities. Educator centres also need to be capacitated and accessible. It is clear that most learning centres especially in rural communities lack even the traditional and basic learning materials such as books, stationery and workbooks. In other areas, schools are in need of basic furniture such as chalkboards, desks, chairs, tables and lockable cupboards. Where schools are required to meet the needs of all learners, it can be expected that equipment of an advanced nature will be required to enhance learning. For instance, the introduction of Curriculum 2005 requires certain materials and equipment to be available at the learning centre and at the learner's home. This is a big challenge that must be understood and met by schools, parents and the wider community.

Cultivating a Culture of Community Integration and Involvement in the Life of the School

Community integration and involvement in schools need to be cultivated and rejuvenated. While many parents in disadvantaged communities may have previously invested in the education of their children, attitudes towards schools and schooling appear to have changed. Since many South African schools became "war zones" between the late 1970s and early 1990s, some communities have felt no need for involvement in schools as the state apparatus tightly controlled them. Tragically, for these and other reasons, many communities have become disengaged from their schools. For example, vandalism at the school place is not something that many communities are willing to bother with. If basic education for all is to be realised, then the community must be reached, not only to protect and secure the school but also to treat it as its own property, which it is. Schools must also be accessible for use by the community as learning centres, (e.g. for ABET classes). They can also be used for community meetings and other social functions.

Improving Adult Literacy

Illiteracy is a scourge that blights development efforts in all areas of community life and needs to be eradicated urgently. The current level of illiteracy in the population is not acceptable and is likely to be underestimated. There is an urgent need to devise more effective assessment tools to measure reading and writing skills as well as basic numeracy skills especially among out-of-school youth and adult populations. Citizens disempowered by illiteracy cannot access the various resources that are bestowed to them by the Constitution. Basic education for youth and adults prepares people to effectively participate in the socio-economic and political life of their communities. The state has to accelerate the implementation of ABET in all provinces as well as carry out monitoring and evaluation activities.

Improving Access to Modern Means of Communication

Schools need to be linked to a variety of technology driven means of communication not only to keep the teaching staff abreast with new developments, but also to allow the learners to reach out to a world outside their immediate surroundings. Availability or access to communication systems allows a school to get or send information quicker. There are still schools that have no operable telephone connections, which is likely to cause administrative delays, management and other problems. For instance, in such a school for the principal to communicate with education authorities he or she has to travel to find a telephone or go to a relevant office. A principal's absence from school, may result in management and control problems at the establishment. Also for purposes of quality assurance and evaluation of performance timeous reporting would be necessary. Having communication channels would expedite this and other processes in schools.

Developing Effective Implementation, Monitoring and Evaluation Mechanisms and Systems

A number of comprehensive policies and regulations have been promulgated affecting the provision of education and training. Unless there is an effective and systematic process of monitoring and evaluating implementation, nothing will be achieved by having these policies. Proper implementation will require a multi-disciplinary approach, which makes the monitoring and evaluation process even more critical to ensure that deviations are addressed quickly. Monitoring and evaluation capacity may need to be built in the stakeholder body especially in the Department of Education. In order to monitor and evaluate implementation of policies and programmes, reliable and timeous availability of valid data is critical. The current quality of the Department of Education data is not in a position to facilitate just-in-time or online data processing. For effective monitoring and evaluation of the implementation of education programmes, the Quality Assurance Unit has to be strengthened to cover all the components of basic education.

Changing Attitudes Towards Implementation of New Policies

Despite the promulgation of the South African Schools Act (1996), by which it is now perfectly legal for a girl who falls pregnant to continue going to school, societal attitudes towards such learners are still negative. The result is that such learners have to attend segregated schools for girls in their condition only. There is clearly a gender bias in this practice. Similarly children with certain disabilities are not necessarily welcome in mainstream schools. Changing the attitudes of educators, learners and community members towards people who have a different condition is one of the biggest challenges faced by all stakeholders in providing education for all.

Confronting the HIV/AIDS Pandemic

The threat posed by the prevalence of HIV/AIDS in the population requires supreme multi-sectoral interventions. The spread of HIV/AIDS, if not arrested, will annihilate large sections of the productive population thus undoing whatever gains and investment have been made to uplift communities. The Ministry of Education has committed itself to announcing clear policy guidelines around HIV/AIDS and to working closely with the Ministry of Health and other partners in addressing this challenge.

6.3 KEY RECOMMENDATIONS

The preceding section has highlighted a number of key areas that require action. This section provides a summary and consolidation of key recommendations. These are:

1. Expansion of ECD programmes to meet the demands of parents and to prepare children for timely and appropriate age entry into Grade 1.

Provision of a Reception Year (Grade R) as part of the compulsory years of schools should help to reduce the large numbers of under-age children enrolled in Grade 1 and contribute to the reduction of high repetition rates at that grade level.

2. Entry-age into Grade 1 should be closely regulated.

Since the first nine years of schooling are compulsory and free, the state needs to ensure that the funds earmarked for this band are well spent. Also any tardiness in this band, i.e., repetition, can cause unnecessary blockages in the system resulting in serious backlogs.

3. More of the education budget should be spent on direct inputs.

The resources required to meet basic education for all in the short term are quite substantial. It therefore becomes imperative that whatever resources are available for education should be circumspectly spent on the things that will make a direct difference on learning outcomes. This means that education authorities at all levels of the structure must have reliable data to manage and control their budgets and prevent fraud.

4. The school building programme needs to be expedited.

Effective teaching and learning in many schools will only start to happen when the basic infrastructure is in place. The need for new classroom space is huge as well as the need to rehabilitate and make schools safe and healthy centres for learning. The 1996 Schools Register of Needs Survey was a good start in creating a database about school information. The key now is to ensure adequate updates of the information as the building programme progresses and changes the conditions and inventories of schools.

5. Literacy must be connected with adult basic education and skills training and integrated in lifelong learning.

There is an urgent need for effective assessment tools for national and provincial management and information systems on literacy, adult basic education and training. Every effort must be made to meet the needs of learning audiences through acceleration of National Multi-Year Implementation Plan for Adult Education and Training. Monitoring and evaluation activities will provide the basis for planning and capacity building.

6. Capacity building should be planned, prioritised, systematised and localised as much as possible.

There have been unprecedented legislative and policy changes which have a direct impact on the education system. Personnel in the system need to be properly prepared to manage and implement the changes. Many in the teaching fraternity, especially in the previously disadvantaged communities, have not had opportunities for self-development, and consequently, are either under-qualified or not qualified at all. Comprehensive human resources and development plans need to be elaborated and critical areas of staff development identified across all subjects. More broadly, research capacity must be developed at both national and provincial levels.

7. School managers need to be equipped for management, leadership and control.

The key tasks of school managers have changed as a result of all the changes that have or are taking place in the education system. Veteran principals need to have opportunities to undergo refresher courses to retool themselves and acquire competencies vital for managing in a changing school environment. As a democratic culture takes root, school managers will still be expected to manage and control their schools by leading the school community and practising democratic leadership. School managers need to be competent in managing finances, staff and relations with the community.

8. Streamline school governance and clarification of roles.

Education policies require that stakeholders interact and play different roles in school governance. The practical application of these policies has been met with scepticism and resistance as role players protect their turf. In areas where there are high rates of adult illiteracy, parents are not able to effectively play their role in school governance.

9. Upgrade and deploy resources for the utilisation of media to enhance teaching and learning.

The information technology is gradually becoming affordable as costs come down and should be aggressively harnessed to support teaching and learning in all schools and communities in pursuit of basic education for all. The involvement of some educators and learners in the SABC educational programming is a superb beginning. There is a need to ensure that as much as possible technology does not lead to skewed development where other sections of the community lag behind. The use of media for instruction can enhance the acquisition of skills by learners.

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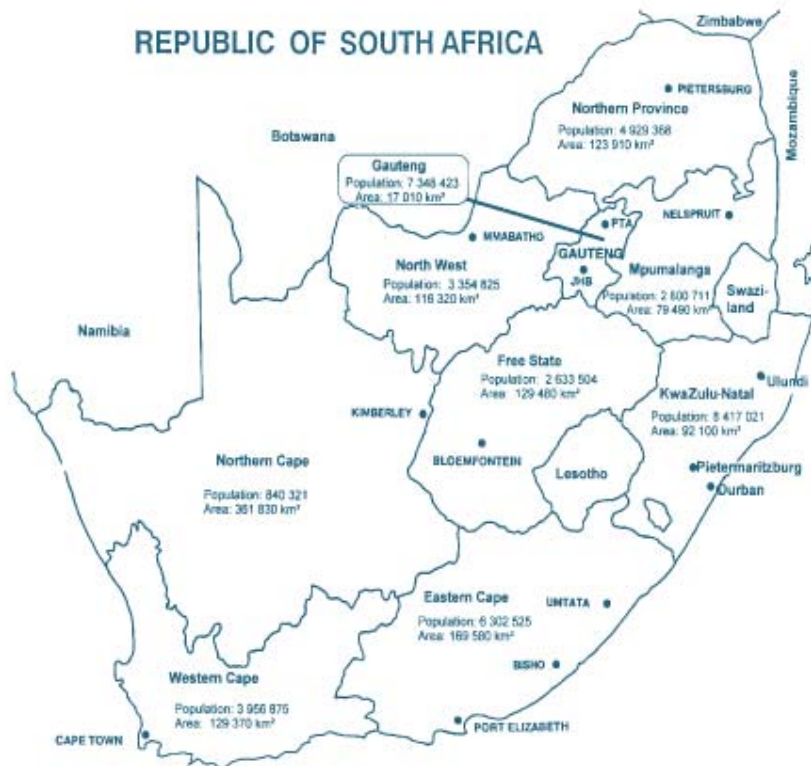
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ANNEX 1

POPULATION DISTRIBUTION BY PROVINCE, REPUBLIC OF SOUTH AFRICA, 1996



Source: Statistics South Africa, 1998

ANNEX 2

GROSS AND NET ENROLMENT RATIOS (INDICATORS 5 AND 6) IN PRIMARY SCHOOLS, SOUTH AFRICA, 1997

Province Enrolment	Gender	Total Primary Enrolment (all ages)	Enrolment of Official Primary School Age	Official School-Age Population**	GER (Gross Enrolment Ratio)	NER (Net Enrolment Ratio)	Gender Parity Index	
		Total*	Total*				GER	NER
NATIONAL (The whole country)	TOTAL	8 088 979	7 304 823	8 384 273	96.5	87.1	0.9	1.0
	Male	4 100 094	3 669 819	4 172 957	98.3	87.9		
	Female	3 635 004	3 635 004	4 211 316	86.3	86.3		
Eastern Cape	TOTAL	1 730 618	1 395 348	1 546 818	111.9	90.2	1.0	1.0
	Male	857 965	684 127	773 882	110.9	88.4		
	Female	872 653	711 221	772 936	112.9	92.0		
Free State	TOTAL	494 519	442 464	513 483	96.3	86.2	1.0	1.0
	Male	252 013	221 960	255 136	98.8	87.0		
	Female	242 506	220 504	258 348	93.9	85.4		
Gauteng	TOTAL	899 528	854 122	1 067 395	84.3	80.0	0.9	1.0
	Male	457 192	429 079	528 379	86.5	81.2		
	Female	442 336	425 043	539 016	82.1	78.9		
KwaZulu- Natal	TOTAL	1 945 390	1 827 522	1 821 232	106.8	100.3	0.9	1.0
	Male	994 070	921 784	906 682	109.6	101.7		
	Female	951 320	905 738	914 551	104.0	99.0		
Mpumalanga	TOTAL	576 330	532 234	607 159	94.9	87.7	0.9	1.0
	Male	295 138	268 799	300 319	98.3	89.5		
	Female	281 192	263 435	306 840	91.6	85.9		
Northern Cape	TOTAL	29 923	121 052	169 740	76.5	71.3	1.0	1.0
	Male	66 001	60 877	85 118	77.5	71.5		
	Female	63 922	60 175	84 622	75.5	71.1		
Northern Province	TOTAL	1 133 439	1 071 405	1 287 344	88.0	83.2	0.9	0.9
	Male	587 560	547 083	639 841	91.8	85.5		
	Female	545 879	524 322	647 503	84.3	81.0		
North West	TOTAL	602 739	501 120	683 622	88.2	73.3	0.9	1.0
	Male	308 067	252 527	339 375	90.8	74.4		
	Female	294 672	248 593	344 247	85.6	72.2		
Western Cape	TOTAL	576 493	539 556	687 479	83.9	81.4	1.0	1.0
	Male	294 405	283 583	344 225	85.5	82.4		
	Female	282 088	275 973	343 254	82.2	80.4		

* These totals do not include enrolment of independent schools. Independent or private institutions are those educational institutions that are not operated by a public authority, whether or not they receive financial support from such authorities.

** Official primary school age: Starting age = 6 completed years; Ending age = 14 completed years

Sources: National Department of Education, 1997 EMIS data Statistics South Africa, 1996 South African Population Census

ANNEX 3

EDUCATION EXPENDITURE ON THE COLLEGE/ SCHOOL SECTOR BY PROVINCE, SOUTH AFRICA, 1997/98*

Province	Budget	
	Amount	Percent
Eastern Cape	6,749,556	17.5
Free State	2,538,766	6.6
Gauteng	5,865,428	15.2
KwaZulu-Natal	7,206,928	18.6
Mpumalanga	2,505,882	6.5
North West	3,240,055	8.4
Northern Cape	849,839	2.2
Northern Province	5,806,741	15.0
Western Cape	3,912,090	10.1
TOTAL	38,675,285	100.0

* Expenditure statistics are not disaggregated separately for the College and School Sectors.

Source: Derived from, Department of Education (1999e). Information on the State Budget for Higher Education, Table 2.

ANNEX 4

FUNCTIONAL LITERACY RATES* OF PERSONS AGED 15-24 AND 15 YEARS AND ABOVE AND LITERACY GENDER PARITY INDEX (INDICATORS 16, 17 AND 18) BY PROVINCE, SOUTH AFRICA, 1996

Province	Gender	Population		Number of Literate Persons		Literacy Rate		Literacy Gender Parity Index	
		15+	15-24	15+	15-24	15+	15-24	15+	15-24
NATIONAL (The whole country)	TOTAL	26 337 143	8 160 315	17 590 913	6 797 428	66,6	83,3	1,0	1,1
	Male	12 411 682	3 966 197	8 370 423	3 216 853	67,4	81,1		
	Female	13 925 461	4 194 118	9 180 490	3 580 575	65,9	85,4		
Eastern Cape	TOTAL	3 774 620	1 280 464	2 336 203	1 004 048	62,4	78,4	1,0	1,1
	Male	1 637 382	605 527	1 000 808	440 785	61,1	72,8		
	Female	2 137 238	674 937	1 355 395	563 263	63,4	83,5		
Free State	TOTAL	1 784 501	528 728	1 198 067	449 906	67,1	85,1	1,0	1,0
	Male	875 201	256 515	587 053	213 359	67,1	83,2		
	Female	909 300	272 213	611 014	236 547	67,2	86,9		
Gauteng	TOTAL	5 410 774	1 370 394	4 090 970	1 210 323	75,6	88,3	1,0	1,0
	Male	2 785 620	698 878	2 074 582	604 787	74,5	86,5		
	Female	2 625 154	671 516	2 016 388	605 536	76,8	90,2		
KwaZulu Natal	TOTAL	5 311 394	1 765 550	3 357 601	1 427 973	63,2	80,9	0,9	0,9
	Male	2 403 502	843 897	1 580 300	672 603	65,7	89,5		
	Female	2 907 892	921 653	1 777 301	755 370	61,1	82,0		
Mpumalanga	TOTAL	1 751 238	576 964	1 071 459	478 421	61,2	82,9	0,9	1,0
	Male	841 775	279 492	529 878	227 227	62,9	81,3		
	Female	909 463	297 472	541 581	251 194	59,5	84,4		
Northern Cape	TOTAL	553 513	159 515	342 449	124 956	61,9	78,3	1,0	1,0
	Male	268 486	79 267	165 076	60 993	61,5	76,9		
	Female	285 027	8 0248	177 373	63 963	62,2	79,7		
Northern Province	TOTAL	2 786 723	1 051 268	1 641 316	894 713	58,9	85,1	0,9	1,0
	Male	1 190 316	502 859	756 455	420 575	63,6	83,6		
	Female	1 596 407	548 409	884 861	474 138	55,4	86,5		
North West	TOTAL	2 191 864	680 150	1 374 253	541 292	62,7	79,6	1,0	1,1
	Male	1 070 825	329 386	662 218	254 400	61,8	77,2		
	Female	1 121 039	350 764	712 035	286 892	63,5	81,8		
Western Cape	TOTAL	2 772 516	747 282	2 118 595	665 796	76,4	89,1	1,0	1,0
	Male	1 338 575	370 376	1 014 053	322 124	75,8	87,0		
	Female	1 433 941	376 906	1 104 542	343 672	77,0	91,2		

* A functionally literate person is defined as a person who has attained Grade 6 or a higher grade.

Source: Statistics South Africa, 1996 South African Population Census