EDUCATION FOR ALL STATUS REPORT 2002

SOUTH AFRICA

incorporating country plans for 2002 to 2015

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EDUCATION FOR ALL STATUS REPORT
INCORPORATING COUNTRY PLANS FOR 2002 – 2015, SOUTH AFRICA
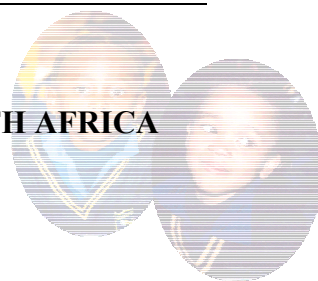
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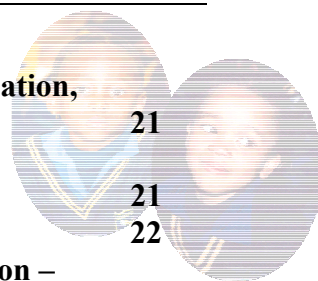EXECUTIVE SUMMARY

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[1] Republic of South Africa, National Treasury, Intergovernmental Fiscal Review, 2001
[2] Republic of South Africa, National Treasury, Intergovernmental Fiscal Review, 2001

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ACRONYMS

ABET	Adult Basic Education and Training
ADEA	Association for Development of Education in Africa
AU	African Union (formerly the Organisation of African Unity)
CBO	Community-Based Organisation
CHE	Council for Higher Education
DAS	Development Appraisal System
DHS	Demographic Health Survey
DoE	Department of Education
ECD	Early Childhood Development
EFA	Education for All
ELSEN	Education for Learners with Special Education Needs
EMIS	Education Management Information System
ESF	Equitable Shares Formula
FET	Further Education and Training
FETI	Further Education and Training Institutions
FETC	Further Education and Training Certificate
GET	General Education and Training
GETC	General Education and Training Certificate
HE	Higher Education
HEQC	Higher Education Qualifications Council
HOD	Head of Department
HRD	Human Resource Development
ICT	Information Communication Technology
INSET	In-service Training
LIEP	Language in Education Policy
LSM	Learner Support Material
MTEF	Medium Term Expenditure Framework
NABABET	National Board for Adult Basic Education and Training
NCS	National Curriculum Statement
NEPAD	New Partnership for Africa Development
NGO	Non-Governmental Organisation
NPA	National Programme of Action
NPDE	National Professional Diploma in Education
NQF	National Qualifications Framework
NSA	National Skills Authority
NSFAS	National Student Financial Aid Scheme
OHS	October Household Survey
PED	Provincial Education Department
PFMA	Public Finance Management Act
PRESET	Pre-service training
RPL	Recognition of Prior Learning
SADC	Southern African Development Co-operation
SANLI	South African National Literacy Initiative
SAQA	South African Qualifications Authority
SASA	South African Schools Act
SCE	Senior Certificate Examination
SETA	Sector Education and Training Authority
SGB	School Governing Body
SMT	Senior Management Team
WSE	Whole School Evaluation

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i. The EFA Technical Reference group comprising the following education specialists: Dr Z Dlamini of Nothemba Media (and former head of a provincial education department), Professor NV Magi (Dean, Faculty of Education, University of Zululand), Professor Y Jiya (Programmes Coordinator: B.ED. (Hons)), Mathematics and Science Education, PGCE/B. Ped. IV, School of Education, University of Fort Hare), and Professor C Simkins (Professor of Political Economy, University of the Witwatersrand) for technical editorial support.

ii. Members of the EFA Steering Committee who assisted in guiding consultations for validating the report, and who are responsible for key aspects of education implementation and provision.

iii. Members of the Global Campaign for Education (South Africa), a civil society coalition, consulted about the report.

iv. Provincial and national education officials and colleagues in Statistics South Africa who provided information, advice and support on different aspects of the report in its development.

v. Personnel of the Directorate: Policy Support who, together, analysed data and information collected in order to compile and produce this status report and country plan.

TECHNICAL NOTES

i. The data and information in this status report have been analysed in relation to EFA goals and adapted from the EFA indicators for use in the South African context.

ii. In many cases, sub-national data is shown, as this publication is meant to be for both national and international consumption.

iii. Where data used from any source outside the education system or the national statistical agency, the source is acknowledged in this report. Much of the analysis on the education and population data (excluding enrolment and participation rates in primary and secondary schooling) in this publication has been specially carried out using data and information from the education system and data provided by Statistics South Africa. Price level changes were calculated from data obtained from the South African Reserve Bank.

FOREWORD

EDUCATION FOR ALL STATUS REPORT INCORPORATING COUNTRY PLANS FOR 2002 TO 2015, SOUTH AFRICA

It gives me great pleasure to release this Education for All Status report that incorporates a summary of the interventions we have made, and plans to strengthen our education system.

In 1994, long before the World Education Forum in Dakar at the turn of the century, we started to develop a democratic and equitable system of education never before seen in South Africa. The goals agreed in Dakar helped to refine our implementation strategies and guide our future plans. As a country, we have been able to break with our apartheid past, reduce our debt servicing, reprioritise our budgets, and increase spending on social development and social services in real terms.

Since 1994, we have made progress in expanding access to early childhood development programmes, eliminating gender disparities in primary and secondary education as well as in literacy programmes. Furthermore, through the implementation of the revised national curriculum and more equitable resourcing, we have established the foundation for improving quality and equity of opportunity for the learners in our system.

We still have many challenges to overcome. The problems presented by the levels of poverty mean that we have to make even greater efforts to enable and to ensure that children from poor and rural communities, particularly vulnerable or disabled learners, participate in and complete basic education comprising nine years in the requisite time. We have to work to create a set of democratic values in our learners so that they will possess the attitudes and behaviour that contribute to shaping the development of our country. We have made quality a priority, especially in literacy programmes. We have a long way to go in reducing the number of adults in our country who have no schooling, but we have planned, with our partners in education, to reduce their numbers by an average of 100, 000 per year in future. Our interventions to improve the subject knowledge and teaching practice in Mathematics and Science bode well for learner performance in these critical areas, particularly in poor communities. Our life skills programmes continue to be rolled out to young people and adults and we are monitoring the impact that these programmes have on the lives of learners as they change to safer behaviour patterns.

The role of our partners in strengthening policy compliance and implementation cannot be under-estimated. With our partners in the NGO world, local and international development agencies, private business, civil society, research and academic agencies, governance structures, unions, inter-governmental forums, student organisations and professional organisations, we know that we will be able to achieve Education for All – with quality – by 2015.

Professor Kader Asmal, MP
Minister of Education

OVERVIEW BY THE DIRECTOR-GENERAL

This *Education for All Status Report 2002 – incorporating country plan for 2002 to 2015* maps out the progress South Africa has made in achieving the Dakar goals agreed at the World Education Forum in 2000. The report describes the history of education provision, followed by progress and plans for achieving equity, access, quality, democracy and efficiency in each of the Dakar goal areas.

The approach of South Africa to Education for All is that EFA is not a new initiative to be implemented, but it provides the opportunity to strengthen existing education development and reform in the system. Consultation has characterised the policy development and implementation context in post-apartheid South Africa. The challenge is to enhance and extend partnerships and collaboration with civil society and other partners in the areas of policy compliance and quality education outcomes.

This report does not just describe progress and plans in the formal education system as a result of activity by the state. It also suggests how all in the education community may strengthen implementation and education outcomes in general. We know that in order to achieve our national development goals, we will need to invest in quality basic education as well as secondary education, further education as well as higher education. Enhanced curriculum reform, better completion rates, teacher development, infusion of values into classrooms, and reducing barriers to performance, eliminating discrimination, and better poverty targeting of service delivery will enable education outcomes to be more equitable and much better than in the past.

Systems continue to be elaborated and refined for better management, procurement, monitoring and evaluation and service delivery in all aspects of education. This is particularly true if we are to translate the large investments observed recently in infrastructure and textbooks and Learners Support Materials into education inputs available to learners in good time.

This report will be of use to national and international education partners and it shows that great strides have been made nationally in all areas including Early Childhood Development, lifeskills, general education, literacy and adult education, quality improvement, and gender equality. In spite of international reports suggesting otherwise, projections are that literacy targets will be met in South Africa. The challenge is to ensure that the encouraging national picture with regard to EFA goals is reflected in all communities and all classrooms in South Africa, particularly those in which poor learners are taught.

Mr TD Mseleku
Director-General: Education

EXECUTIVE SUMMARY

In Dakar, 164 countries, including South Africa, committed themselves to the following six goals, and a summary of the ways in which these goals will be achieved in South Africa follows:

1. Expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children.

South Africa is committed to the EFA goal of "expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children". The country has set a target of expanding provision of early childhood development through the provision of the Reception Grade to all 5 year-olds by 2015. Given that in 2000, the average South African child received 0.7 years of early childhood development and education before entering Grade 1, this means that the average learner will have experienced 1.7 years of early childhood development and education by the time the Reception Grade is fully implemented. This level of provision is equal to the coverage that will be achieved by other countries in the same income category as South Africa by 2015. Poverty targeted nutrition and resourcing will be implemented in the expansion of early childhood programmes, particularly to those vulnerable children affected by HIV/AIDS or with special education needs. An annual enrolment growth of about nine per cent will enable full enrolment of 5 year-olds in the Reception Year by 2015.

2. Ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to complete free and compulsory primary education of good quality.

This goal relates to the fact that in South Africa, **general or basic education of nine years' duration** is compulsory. Bearing in mind that the priority in South Africa is the redistribution of resources for equitable education provision, completely free Education for All is made available to poor learners through the fee exemption policy. Arrangements have been made to ensure adequate, quality education which is free for the poor at both the primary and the secondary level. The challenge for education in South Africa is to ensure compliance with policy and legislative arrangements.

Enhanced and targeted provision forms the basis for interventions in basic (general) education as well as the development of systems for development, management, provision, and monitoring of key education inputs such as Learner Support Material, teacher and management development programmes and resources for implementing the modernised curriculum using an outcomes-based approach called Curriculum 2005. Curriculum 2005 comprises eight learning areas, which are intended to provide a basis for lifelong learning and sustainable development. The emphasis in the modernised curriculum is on the acquisition and development of knowledge, skills, values and attitudes.

Other strategic interventions include improvement in the quality of teaching in key subjects and a strengthening of the outcomes and effects of HIV/AIDS interventions and life skills programmes in education. Special assistance has also been sought in collaboration with the National Treasury to: improve school effectiveness; literacy programme implementation, co-ordination and graduate output; further education and training restructuring and curriculum; improve participation in mathematics, science and

technology, particularly for female learners; improve the administration, credibility and performance in the Grade 12 Senior Certificate Examinations; strengthen organisational effectiveness including management and planning; enhance values in education and the status of history in education; and enhance HIV/AIDS interventions through providing life skills competencies through the National Curriculum.
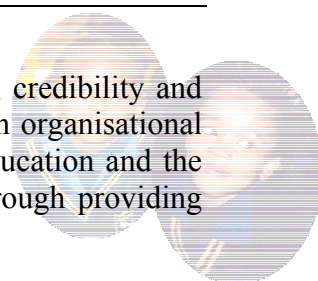
3. Ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life skills programmes.

The Department of Education in South Africa has a constitutional obligation to make FET progressively available. The plans outlined below show how the education system in South Africa will be "ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life skills programmes". A new National Curriculum has recently been launched for FET in schools, and the recently observed expansion in FET activity, and plans for implementing and transforming the FET landscape all contribute to increasing access to learning and life skills programmes which will enhance social and economic opportunities for young people and adults. In addition, FET institutions (formerly colleges) will be restructured and transformed to provide flexible training in scarce skills areas, with different delivery modes, a diverse learner profile which will reflect young and mature adults, and the ability to draw on a variety of funding sources in addition to state funding. FET schools will be predominantly senior secondary schools with learners aged 16 to 18 years. Some FET schools will be converted into centres of excellence in art or music, for example.

The recently completed restructuring of FET was necessary to modernise and improve the curriculum and education outcomes at these institutions and in the complex FET system in general. FET in schools has traditionally been of public interest and the Grade 12 Senior Certificate Examination (SCE) represents a high stakes qualification which is valued in the labour market and therefore determines the future of most school graduates. Although pass rates in this key examination have increased in recent years and flow through rates have improved with more learners making it through to Grade 12 in the required number of years than before, challenges persist. A shift of focus towards quality in the system has resulted in the quality of passes, and the proportion and number of exemptions (for Higher Education admission) being improved. Attention is being paid to further reducing repetition in lower secondary grades and more vigorous local interventions in poorly performing schools.

The Department of Education has also introduced a number of initiatives for the improvement of learner performance in Mathematics, Science and Technology. Practising educators have also been targeted to improve their skills in content and pedagogic aspects of mathematics and science through Higher Education programmes and 102 schools have been targeted through the Dinaledi (Sesotho for 'Stars') project for special assistance to improve learning and resource materials and increase learner achievement in mathematics and science.

Challenges in the system include the great effort required to mobilise the considerable investment which will be required to enable FET institutions to be flexible enough to provide programmes that are market-relevant and cost effective. The implementation of the new FET Curriculum will require a large investment and careful management and strategies are being developed to optimise the implementation of the modernised FET Curriculum.

4. Achieving a 50 per cent improvement in levels of adult literacy by 2015.

Adult education and training is an area in which there are many players, particularly in the public, non-governmental and private sectors, so that some of the challenges relate to the effective co-ordination of these sectors in achieving literacy targets. The plans for achieving expansion in adult literacy are listed below along with challenges for provision. South Africa is on track to achieve the literacy target as long as the number of learners graduating from Grade 9 (particularly when the General Education and Training certificate is implemented) remains at levels above 470, 000 per year. However, as well as being committed to improving literacy rates, the Department of Education is committed to expanding opportunities for lifelong learning adult education and training, particularly in partnership with SETAs, non-governmental and private organisations. Current average annual increases of just under 1.2% in the number of adults participating in Adult Basic Education and Training levels 1 to 4 programmes must be sustained at levels in line with population growth (currently just under 2%) to ensure that expansion to adults is sustained. This will enable the EFA targets to be achieved before 2015 for Adult Basic Education and Training as well as adult education and training.

By 2015, of the estimated population of 53 million people, 34 million will be aged 15 years and over and 28 million of these over-15-year-olds will need to be functionally literate if the EFA goal is to be achieved. The EFA goal of halving the illiteracy rate means an average increase in the number of people aged 15 and over who are functionally literate by just under 470,000 annually from 1996. This is equivalent to increasing the national functional literacy rate to 83% by 2015 for people aged over 15 years old, from 1996 values of 67%, and increasing the functional literacy rate of 15 to 24 year-olds from the 1996 levels of 83% to 92% by 2015.

The 2001 National Census will, in 2003, provide a basis for assessing the impact that literacy and adult basic education and training initiatives have had on the population in the last five years, but already, comprehensive plans are in place to reach learners and improve participation in Adult Basic Education and Training to consolidate the gains made in funding and in participation in a systematic way.

5. Eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015, with a focus on ensuring girls' full and equal access to and achievement in basic education of good quality.

The Dakar Framework for Action requires the elimination of gender disparities by 2005, implying that participation rates should be equalised by this time, after which gender equality and equality of opportunity should be achieved by 2015. In South Africa, as many females participate in literacy programmes as men, in proportion to the numbers in the population, so gender parity has been achieved. The forthcoming results of the 2001 Census will provide data on the trends since 1996. In addition, as many girls as boys participate in schooling overall, although there are gender disparities at primary level (with more boys than girls enrolled), which are reversed in the secondary level of education (with more girls than boys enrolled). Secondary level participation is a problem that is receiving attention as the high drop-out rates of boys in secondary grades (most probably for employment reasons) has an impact on their ultimate education outcomes, literacy levels and sustained participation in social and economic activities. These dynamics and the reasons for dropping out are being investigated so as to design appropriate strategies for reducing these enrolment patterns especially at local level. In addition, measures have been instituted to monitor attendance at school level in order to alert the functional units responsible to vulnerable learners who may be prone to dropping out of the system.
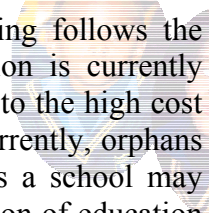
Infrastructure backlogs relating to water and sanitation have been prioritised, as these affect the participation of girls. Non-discrimination against pregnant learners has been made policy so that barriers faced by girl children, especially in attendance and achievement have been considerably reduced The challenge is to ensure the inclusion of all female children in quality schooling and the removal of all barriers, especially those related to private costs associated with learners, and particularly poor female learners getting a good quality basic (general) education.

6. Improving all aspects of the quality of education and ensuring excellence of all so that recognised and measurable learning outcomes are achieved by all, especially in numeracy, literacy and life skills.

The Department of Education in South Africa is committed to "improving all aspects of the quality of education and ensuring excellence of all so that recognised and measurable learning outcomes are achieved by all, especially in numeracy, literacy and life skills". Several quality improvement strategies have been outlined in key systemic policies, interventions, and strategies. Many of these interventions were made under the banner of the *Tirisano* programme which was launched in 1999 to nurture a high quality education system which was accountable, transparent, effective and efficient, and most of these interventions will be elaborated more fully in the years to come.

Plans for improving quality in the provision of education between 2002 to 2015 include strategies for: implementing curriculum reform; mitigating the impact of HIV/AIDS through the curriculum and in the education system itself; managing teacher supply and demand; alleviating poverty through an Integrated Nutrition Programme in schools and early childhood development and primary centres; and introducing a redress pool of about 5% of educators to be allocated to schools with the poorest learners to enable teacher quality to be targeted for needy learners in the education system. As well as this,

considerable technical capacity will be developed to ensure that funding follows the poorest learners in the schooling system. The Department of Education is currently developing strategies to reduce the burden borne by poor parents related to the high cost of uniforms, quality textbooks and supplementary resource materials. Currently, orphans living at institutions qualify for an automatic exemption from any fees a school may decide to charge. The Department plans to strengthen mainstream provision of education for vulnerable learners within education institutions, and provides for inclusion of out-of-school youth, the development of local district support and specialised support teams to provide support and assistance to learners who require it.

In addition, technology-in-education initiatives have been applied in several schools and education institutions. Monitoring and evaluation systems will be established and maintained to track trends in service delivery, system resourcing and policy compliance. Monitoring and evaluation of provincial processes such as school readiness, expenditure on key items, and expenditure trends will continue to assist in refining education provision and policy implementation. A campaign to enhance values and history in education has already been launched while discrimination against learners, such as racial slurs or exclusion from schooling, will be regularly and objectively monitored and strategies implemented to reduce such incidents. Literacy and adult education interventions will be strengthened and school effectiveness initiatives including, teacher development and support, management and governance development programmes will enable more schools to become centres of community life, particularly in rural areas.
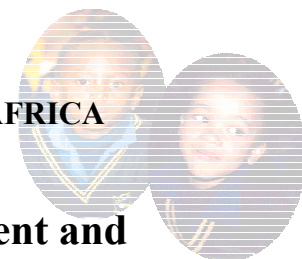
1 Introduction: The Education for All (EFA) movement and developments since 1990

1.1 The Education for All movement

Participants at the World Conference on Education for All in Jomtien, Thailand, in 1990 pledged in the *World Declaration on Education for All* and the *Framework for Action for Meeting Basic Learning Needs*, to provide primary Education for All children and massively reduce adult illiteracy by the end of the decade. The Framework for Action suggested key targets and guidelines for achieving these targets[3].

An EFA 2000 assessment took stock of progress towards basic education in 180 countries and found that there had been significant improvements and partial achievement of the goals set in 1990. Quality and completion rates in the education system, however, were persistent challenges in 2000, along with unacceptably high illiteracy rates, especially among women.

- Some 10 million more children went to school every year during the decade.
- The overall adult literacy rate rose to 85 per cent for men and 74 per cent for women.
- Enrolment in primary school rose from 599 million in 1990 to 681 million in 1998.
- The number of out-of-school children fell from an estimated 127 million children to 113 million children.
- Globally, there was a 5 per cent increase in enrolment in pre-primary establishments.

In the Southern African region, there have been remarkable developments. Gender parity is high in Southern Africa, while many countries have attained near universal primary education and high adult literacy. Specifically, gender parity in primary education and in adult literacy in South Africa is 1. More still needs to be done - specifically within countries, as aggregated information on education sometimes masks disparities in provision between certain areas, communities and socio-economic groupings within countries.

1.2 Dakar 2000 goals

Following the Jomtien 1990 conference, a follow-up World Education Forum Conference was held in Dakar, Senegal (26-28 April 2000) to review advances in basic education in the 1990s and to reinvigorate commitment to Education for All. Some one thousand one hundred participants from 164 countries adopted the Dakar Framework for Action, committing themselves to achieving quality basic Education for All by 2015. Sub-Saharan countries committed themselves to a regional (sub-Saharan) framework for action and the achievement of the six goals agreed on at the World Education Forum in Dakar in 2000.

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[3] http://www.unesco.org/education/efa

[4] http://www.unesco.org/education/efa

In Dakar, 164 countries, including South Africa, committed themselves to:

1. Expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children;
2. Ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, will have access to and complete free and compulsory primary education of good quality;
3. Ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life skills programmes;
4. Achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults;
5. Eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015, with the focus on ensuring girls' full and equal access to and achievement in basic education of good quality; and
6. Improving all aspects of the quality of education and ensuring excellence of all so that recognised and measurable learning outcomes may be achieved by all, especially in numeracy, literacy and life skills.

To meet these goals and challenges, countries accepted that it is important to learn from the many examples of good practice and successful policies that have proven to be effective in the African context, especially those focusing on improving access, equity, relevance, quality and capacity building.

1.3   Dakar Framework for Action

The regional framework for action for sub-Saharan countries adopted by the World Education Forum in Dakar, Senegal in April 2000, outlines the following guidelines to be used to inform initiatives (including policy), strategies and action plans for achieving education goals.

1.3.1   Expansion of quality early childhood education and development
1.3.2   Increasing universal access to and completion of primary (basic) education
1.3.3   Improvement in learning achievement
1.3.4   Enhancement of the education of girls and women
1.3.5   Reduction of adult illiteracy
1.3.6   Expansion of basic education and skills training for out-of-school learners
1.3.7   Putting in place HIV/AIDS education programmes and response mechanisms
1.3.8   Improving management and governance
1.3.9   Increasing budgetary allocations to education
1.3.10   Institutionalising the assessment and monitoring functions of the EFA team

1.4   EFA and national, regional and other global development goals

World conferences organised by the United Nations in the first half of the 1990s gave rise to seven global Millennium Development Goals to reduce poverty and achieve sustainable development. The International Monetary Fund, the Organisation for Economic Co-operation and Development (OECD), the World Bank and the United Nations have pledged to work together towards these aims, two of which coincide with those set in Dakar: the elimination of gender disparities in primary and secondary education by 2005 and the enrolment of all children in primary school by 2015.

Other continental initiatives aimed at promoting educational development include: the work of the Association for the Development of Education in Africa, the O/AU Decade of Education in Africa, the work of Southern African Development Community (SADC), the World Bank, Group of 8 Education Task Force, and the New Partnership for Africa's Development (NEPAD) human resource development initiatives.

Two of the Millennium Development Goals relate to the EFA goals of achieving universal primary education and the elimination of gender disparities in primary and secondary education by 2005, and achievement of gender equality by 2015. In addition, EFA was adopted as an African Union programme in 2002 and the final World Summit on Sustainable Development implementation plan states the necessity of pursuing the EFA goals of universal primary education and gender equity and equality.

1.5   Opportunities for success in achieving the Dakar goals

Firstly, since the early 1990s, the international community has become more determined to assist in developing education. Education has finally been acknowledged as a right and its importance for social and economic development stressed, with agreement and partnership commitments from civil society and international agencies.

Dakar also addressed the issue of funding and pledged that "no country seriously committed to basic education will be thwarted in the achievement of this goal by lack of resources". Resource mobilisation and management are now at the heart of the education debate and a global initiative is being developed to provide a framework for co-operation between countries and development and donor agencies. The recently released *International Framework for putting EFA into operation* builds on the Dakar goals and proposes a framework within which international agencies should support and assist countries in achieving their Education for All goals. The proposals in the framework include the co-operation of international agencies in education development initiatives, among others.

Thirdly, the notion of accountability built into the *Dakar Framework for Action* is another encouraging factor. The idea of an EFA Observatory's *Global Monitoring Report* was approved by the World Education Forum in Dakar and annual reporting on progress will be invaluable in providing early warning signals on progress made by countries towards achieving the goals of Education for All. The monitoring of these goals will rely on countries' monitoring and evaluation capabilities. To be useful, the information thus produced will need to be inserted into the policy development and implementation processes for national education initiatives.

2   EFA in South Africa

2.1   The South African approach to EFA goals and planning

As a result of international isolation, South Africa did not participate in the 1990 Jomtien World Conference. After the first democratic elections in 1994, South Africa was invited to participate in the EFA process. In spite of this late entry and participation in EFA processes, South Africa embraced and expressed a commitment to the EFA goals, principles and targets articulated in the Jomtien *World Declaration on Education for All* and the *Framework for Action for Meeting Basic Learning Needs* and the goals subsequently set in the *Dakar Framework for Action* adopted in 2000.

As will be seen later in this Report, education policy and programmes developed since the start of the democratic transformation of South Africa in 1994 show alignment with the EFA goals and priorities as well as national social development and economic development goals, priorities and targets.

In South Africa, there is no separate EFA plan and education development and education reform initiatives are integrated into national strategic plans, policies and programmes for education. Reform of the education system in South Africa is assisted by the Education for All (EFA) initiatives, as the latter have the potential to strengthen existing national education initiatives (policy, programmes, strategies and processes). This is evident in the national strategic plan[5] published by the Department of Education for 2002-2004 which clearly shows programmes and initiatives which fit into the EFA plan, and are clearly linked to, achieving the goals of universal primary education in general, and quality non-discriminatory basic education in particular. In South Africa**, basic education has been declared a constitutional right, with further education and training having to be made progressively available**. These constitutional obligations are further elaborated in education policies, goals, documents and programmes in the education system.

Monitoring and evaluation of EFA goals are carried out, using information collected within the education system itself, information and data mainly from Statistics South Africa and supplementary information from other research and statistical agencies. An Education Management Information System (EMIS) has been developed to provide the information infrastructure required for the information needs of planners and managers in the system. Information from other management systems (such as the examinations, financial and personnel databases) is used to supplement information in the EMIS for monitoring and evaluation purposes as well as for planning and decision support.

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[5] The Strategic Plan for the Department of Education is available at the following Internet url:
http://nikita/Tirisano_Folder/Stratplan02-04/7428-inside%20(final).pdf
[6] The Strategic Plan for the Department of Education is available at the following Internet url:
http://nikita/Tirisano_Folder/Stratplan02-04/7428-inside%20(final).pdf

2.2   Socio-economic context

South Africa is a middle-income country with an estimated Gross Domestic Product (GDP) of R1 082.8 billion in 2002/03 and a population of 43,3 million with 77.8% African/Black, 10.6% White, 8.9% Coloured and 2.6% people of Indian descent according to figures from the national statistical agency, Statistics South Africa (Population group describes the racial classification of a group of South African citizens. The previous government used legislative means to impose this type of classification to divide the population into distinct groupings on which to base apartheid policies. It is important to continue to monitor the effects of policies designed to reverse this discrimination on these population groups. Currently, the population group of a person is based on self-perception and self-classification rather than legal definitions as in the past). Economic and social discrimination against Black South Africans under apartheid left the country with considerable income inequality along racial lines with public spending on each Black student as low as 20% of the spending on each White student. Apartheid public budgets directed little expenditure towards education, health, housing and basic needs of Black South Africans. The 1994 post-apartheid system therefore aimed to democratise state institutions, redress inequality and extend services to the broader population.

The democratic government elected in 1994 inherited an education system that was very unequal, in particular in terms of race and region. As late as 1986, the state spent nine times more on each White learner than it spent on learners in the worst-off Bantustans. Since 1994, this apartheid legacy has been tackled aggressively through the equitable inter-provincial allocations of funds and resources through education-specific–poverty-targeting mechanisms which mobilise funds towards the poorest learners in the system.

Since 1994, there has been much improvement in social and economic development. Basic infrastructure provision in general has improved since 1995 with the following changes noted in national household surveys of South Africa's population between 1995 and 1999:

- A two percentage point increase in access to public health facilities to 69.4%
- A six percentage point increase in access to telecommunication infrastructure, (fixed land line and cellular phones) to 34.9%
- A six percentage point increase in the use of electricity to 69.8%
- Evidence of the expansion of access to sanitation and running water from a five percentage point increase in access of households to clean piped water to 83.4%

In spite of these development gains, challenges persist. For mainly historical reasons, poverty and living standards are strongly correlated with race, gender, mortality and morbidity rates, household location – provincial and rural/urban, household income and expenditure and employment rates, susceptibility to illness including communicable and emerging diseases, access to basic and social services, and education levels. Poverty threatens to trap the vulnerable so that they never fully participate socially and economically in society. A poverty study in 1998 found that the poorest 40 per cent of the population earned only 11 per cent of income, while the wealthiest 10 per cent earned 40 per cent. Almost 10 million (or 58% of) children are poor (using a relative poverty line which defines the poorest 40% of households as poor). Along with rising incidence of

HIV/AIDS, poverty represents the largest challenge to sustainable development in South Africa.

Poverty alleviation is complex and depends on a set of closely linked interventions for a sustained effect, rather than just one intervention in any one sector. It is against this complex background that education interventions must be set for immediate and long-term human capital development. The Government of South Africa has an anti-poverty strategy which intends to sustain human resource development by: reducing absolute income poverty and asset poverty through employment creation, social safety nets, and infrastructure development; raising educational achievement through maintaining enrolment at primary and secondary level, improving completion rates and reducing drop-out and repetition rates; raising the cognitive skills of school graduates; and improving the health of the population.

Effective poverty alleviation depends on the integration of service delivery across sectors and the Departments of Education, Health and Social Development (formerly Welfare) were grouped into the Social Cluster in 1999 to integrate service delivery and tackle common social and human development challenges and priorities such as integrated rural and urban development, HIV/AIDS, food security, poverty, literacy and Early Childhood Development. Integration is evident in the implementation across all public sector departments of interventions in 18 development nodes identified as part of the Urban Renewal and Integrated Sustainable Rural development Strategies. In addition, certain geographical areas have been targeted for employment and economic development to counteract the effects of spatial underdevelopment.

Despite the challenges of poverty and historical inequities in service provision, the provision of physical resources and infrastructure has been of paramount importance in the education system, especially to those learners in conditions of deprivation in schools which were historically under-resourced. Between 1996 and 2000, improvements were made in eliminating backlogs in telecommunication, water, sanitation and power infrastructure at schools throughout the country. The rural provinces accounted for the largest improvements in the years examined, showing the benefits of improved inter-provincial funding equity and poverty targeting funding to areas of need. Significant resources have been made available for the eradication of severe infrastructure backlogs in all provinces as will be seen in Section 4.2.4 of this report. The challenge of translating these increases efficiently into inputs, which will improve the quality of teaching and learning, is one that will occupy the Department of Education and its partners for a long time to come.

2.3 An overview of the Education System in South Africa - governance, legislative and demographic context

2.3.1 South Africa's intergovernmental system [7]

The inter-governmental system in South Africa comprises three "spheres" of government namely national, provincial and local. They are called spheres, rather than tiers or levels, to reflect that they are distinct governments in their own right, each accountable to its own elected legislature or council. The Constitution entrenches *'cooperative governance',* obliging the three spheres of government to cooperate and to negotiate political and budgeting issues between them. The main components of the system are:

- South Africa has a unitary system with three spheres, and significant decentralisation of powers, functions and budgeting.
- National Parliament comprises two houses: a national assembly, and a national council of provinces representing provincial legislatures (and organised local government).
- Each of the nine provinces has its own legislatures and executive committees, as well as administrative structures.
- There are 284 municipalities which are categorised according to whether they are metropolitan, district wide or local structures, and consisting of political and administrative components.
- Provinces are accountable to provincial legislatures, and local governments to councils.
- The system of election at the national and provincial level is one of proportional representation, whilst the local level is a mix of directly elected and proportional representation.

2.3.2 The Constitution and basic education provision

The Constitution assigns functions to the three spheres of government: National and provincial governments are concurrently responsible for functions like school education, health, welfare and housing. In practice, national government's role is primarily to determine policy, while provincial governments shape policy and have a considerable role in implementation.

Most local government functions involve user fee services like electricity, water and sanitation, but they also provide public goods such as municipal and household infrastructure, streets, street lights, and refuse collection.

> The Bill of Rights in the Constitution of the Republic of South Africa states that:
>
> *Everyone has the right*
>
> c. *to a basic education, including adult basic education; and*
> d. *to further education, which the state, through reasonable measures, must make progressively available and accessible.*

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[7] Republic of South Africa, National Treasury, Intergovernmental Fiscal Review, 2001
[8] Republic of South Africa, National Treasury, Intergovernmental Fiscal Review, 2001

2.3.3 Legislative framework – co-operative governance at work

In South Africa, the national Department of Education is responsible for education policy development and facilitating the implementation of education programmes and policies by provincial departments of education. The Constitution (1996) provides the framework for a unitary system of education, managed by the national Department of Education and nine provincial departments. (The exception is Higher Education, where the national department has sole responsibility.) The National Education Policy Act (1996) gives the Minister of Education the power to determine national norms and standards for educational planning, provisioning, governance, monitoring and evaluation. The principle of democratic decision-making must be exercised within the context of overall policy goals. Consequently, provincial powers and those devolved by the provinces to regions, district and educational institutions must align with the goals of **equity**, **redress**, **quality** and **democracy**. In determining policy, the Minister must take into account the competence of provincial legislatures, and the relevant provisions of any provincial law relating to education.
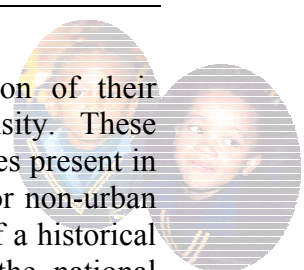
Evidence of enhanced inter-governmental co-operation in the last three years includes better information flow between the education and treasury ministries at national and provincial level, regular monitoring and evaluation of provincial activities, improved administration of the Grade 12 examination, improved levels of procurement and delivery of Learner Support Materials (LSMs) including textbooks, and the development of Education Management Information Systems (EMIS) for decision making. Capacity building for provincial education departments to manage and utilise data at a provincial level continues and attention has been paid to developing the dialogue with the Ministry of Finance in respect of adequacy of management of provincial education budgets. This improved dialogue has improved resource flow to essential areas of service provision, and dialogue with other partners such as development agencies has matured to a point where these agencies are able to align their contributions to the priorities of the Department of Education. This has enabled the Department to secure additional quality technical support for key national and provincial projects.

2.4 Demographic context

South Africa is made up of nine provinces with a population of 43.3 million in October 1999 and 44.6 million in 2001 (up from 40.6 million people in the first population census carried out after the advent of democracy in the country). The characteristics of the nine provinces vary owing to natural, and mainly historical, factors. The geographical distribution of population groups, and the historical patterns of resource allocation to these groups along racial lines and within the nine provincial boundaries have their roots in the social, economic and political history of the country.

Before 1994, the system of government was fragmented along racial lines. There were 17 separate systems of government and administration in three separate administrations catering for Africans, Whites, Indians, and Coloureds, four White provincial administrations, four "independent" states and six "self-governing " territories. The latter two made up the ten "homeland" administrative structures. Since 1994, despite massive obstacles and constraints, South Africa has managed to create a unitary education system while at the same time improving equity and redress in tangible ways in the system.

Provinces containing former homelands tend to have a larger proportion of their population in more rural settings and a higher than average population density. These populations are further from education, training and employment opportunities present in urban areas, and the challenge is to improve access to such opportunities for non-urban populations. Provinces containing former homelands also show the results of a historical lack of investment in human capital. Unemployment rates higher than the national average prevail in these same provinces and more than 1 in 5 people aged over 20 years living in the more rural provinces have no schooling, and only about 5 in every 100 have a tertiary education qualification according to the 1996 Census results released by Statistics South Africa.

South Africa is a youthful country with almost 25% of the population being school-aged (between 6 and 17 years old). The average population density is 33 people per square kilometre, and most people (51.9%) in South Africa are female. The breakdown of the population by population group is as follows: 77.6% African, 8.4% Coloured, 11.6% White, and 2.6% of Indian descent according to figures from the national statistical agency, Statistics South Africa. On average, 53.7% of the population in South Africa live in an urban milieu, though there is a wide range of variation between provinces. Provincial urban populations vary from 11% to 97% of the total provincial population. In the last two decades, the fertility rate of all population groups has declined in South Africa, resulting in a slower population growth in the country, which will manifest itself in a projected decline in enrolment in the next few years.

The wide variation in the demographic and economic profile of provinces and within provinces presents real challenges for education provisioning, particularly in remote areas and communities. The effectiveness and rigour of planning and management of education interventions are particularly crucial in ensuring that quality education outcomes are available to all.

2.5 Education in South Africa – an institutional overview

Education and training in South Africa is linked through the National Qualifications Framework (NQF) which relates learning achievement in the national education and training system through a system of common standards across the General Education (NQF Level 1) including Adult Education and Training, Further Education and Training (NQF Level 2-4) and Higher Education (NQF Level 5 to 8) bands of education.

Curriculum development and reform in South Africa are aligned to the NQF and models of assessment, standard setting, quality assurance and competency are based on a skills framework which uses the NQF as a means for enhancing mobility between levels and institutions of education and training. The National Human Resource Development Strategy, 2001 depends on the NQF as it reinforces the notion of an integrated education, training and development system that contributes to human development in South Africa.

The revised National Curriculum is at the heart of education transformation as it is designed to produce independent critical thinkers, who can solve problems and make meaningful contributions to our society. Using an outcomes-based approach, the curriculum, known as Curriculum 2005, spells out the general and specific learning outcomes envisaged for every learning area and grade. The specific learning outcomes are derived from the cross-field critical outcomes, which together with values, are drawn from the Constitution of the country. The revised National Curriculum for Grades R to 9 (schools) comprises eight learning areas, which are intended to provide a basis for

lifelong learning and sustainable development. Those are: Language, Literacy and Communication; Technology; Human and Social Sciences; Natural Sciences; Life Orientation; Mathematical Literacy, Mathematics and Mathematical Sciences; Economic and Management Sciences; and Arts and Culture. The emphasis in the curriculum is on the acquisition and development of knowledge, skills, values and attitudes.

A diagram illustrating the National Qualifications Framework (NQF), learning achievement in the different bands of the education and training system follows:

Figure 1. Diagrammatic representation of the NQF

School Grades	National Qualifications Framework Level	Band	Types of qualifications
	8	HIGHER EDUCATION AND TRAINING BAND	Doctorates Further research degrees
	7		Higher degrees Professional qualifications
	6		First degrees, higher diplomas
	5		Diplomas, occupational certificates
12	4	FURTHER EDUCATION AND TRAINING BAND	School/College/Trade certificates
11	3		
10	2		
9 8 7 6 5 4 3 2 1 R	1	GENERAL EDUCATION AND TRAINING BAND	ABET 4 ABET 3 ABET 2 ABET 1

In 2000, there were 34 215 education institutions in South Africa with 424 095 state-paid educators and 13 488 572 learners. Of the 34 215 education institutions, 27 760 were public and independent schools, 2 318 were Public Adult Learning Centres, 390 were Centres for Learners with Special Education Needs, 72 were colleges of education (now incorporated into higher education institutions), 153 were technical colleges (now restructured into 51 Further Education and Training Colleges), 3 486 were pre-primary/ Early Childhood Development centres, and 36 were Higher Education institutions.

Table 1. Learner distribution in 2001.

	Independent	Public
Eastern Cape	0.3%	99.7%
North West	1.1%	98.9%
Mpumalanga	1.1%	98.9%
Limpopo Province	1.2%	98.8%
KwaZulu-Natal	1.4%	98.6%
Northern Cape	1.4%	98.6%
Free State	1.7%	98.3%
Western Cape	3.2%	96.8%
Gauteng	7.5%	92.5%
SOUTH AFRICA	2.1%	97.9%

Just over 30% of the population in the South Africa participate in the education system making the education and training task a critical one for development. In 2001, most children (about 95%) in the 7 to 15 year age group were in school. The schooling system

in South Africa is unique, as the independent sector is relatively small and integration of learners occurs in the public system across race, language, and class lines.

At almost 100% participation overall in Grades 1 to 12, South Africa has one of the highest enrolment rates in sub-Saharan Africa, which ranges from Botswana showing a net primary enrolment rate of 81% to Niger with a net primary enrolment of 25%. Access and participation particularly of appropriately-aged learners have improved dramatically from the situation in the late 1980s when the political situation gave rise to unrest and school disruptions on a massive scale. Participation rates for primary and secondary education increased in the years just before the first democratic elections and peaked in 1994 at the time of the first democratic elections, after which primary (Grade 1 to 7) education stabilised and throughput improved (making the Gross Enrolment Rate tend towards 100%) while secondary education (Grade 8 to 12) participation has shown a more sustained increase of almost 20 percentage points since the early 1990s.

Figure 2. Participation rates in primary and secondary education in South Africa since 1990.

Gross Enrolment Rates for primary and secondary education from 1991 to 2001
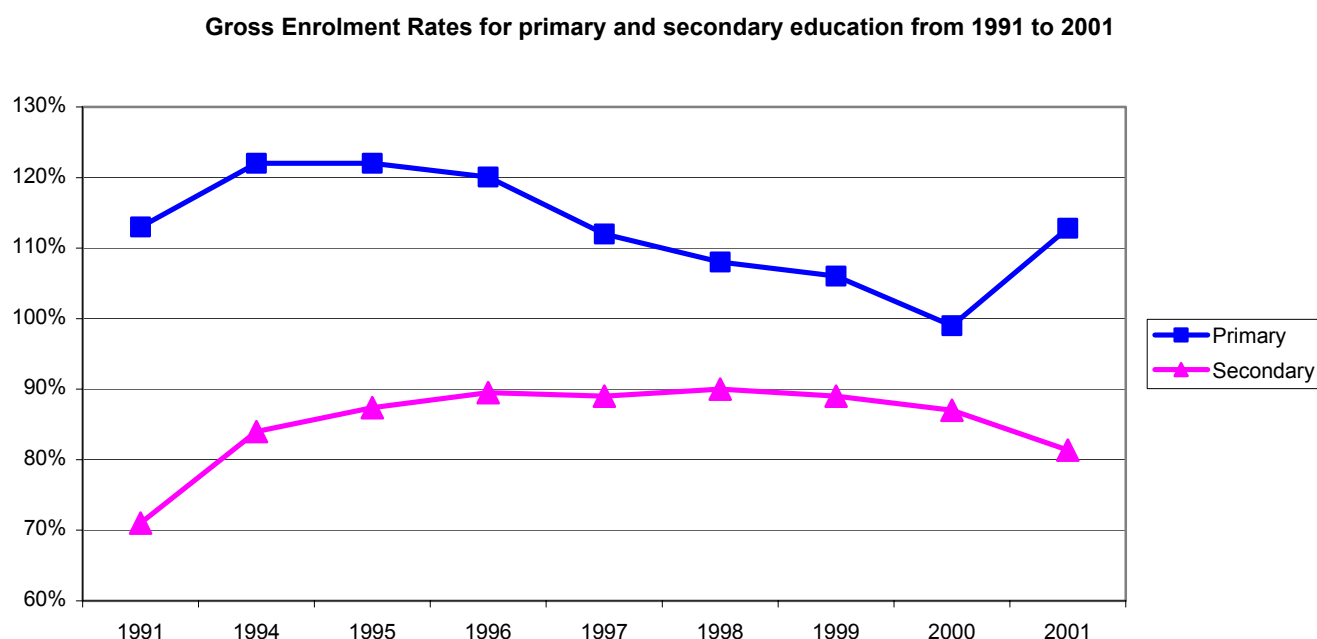
2.6   Education in South Africa – funding a development priority

2.6.1 Funding

There has been a significant increase in public education expenditure under the post-apartheid democratic government, from R31.8 billion in 1994 to R59.8 billion in 2002/03 ($1 = about R10.50 in 2002) and it is estimated that the public education expenditure will increase to R68.3 billion by 2004/05. At almost 6 per cent of Gross Domestic Product (GDP), South Africa has one of the highest rates of government investment in education in the world – much more than several other middle-income or developing countries. According to UNESCO figures for 1999, Argentina spends 4.6%, Brazil spends 5.2%, India spends 2.9% and New Zealand spends 6%. Although public spending on education is projected to decrease as a proportion of GDP from 2002 onwards, the levels of public investment in education will remain high. The challenge will be to ensure that education outcomes (especially for poor learners) and quality of outputs resulting from this investment are improved, as they are currently lower than expected given such high levels of investment in the system. This is particularly important in terms of the Public Finance Management Act, 1999 which lays the base for provinces to reinforce key programmes and service delivery and account for the funds they are allocated by government.

Provinces are funded from the National Treasury through the Equitable Share Formula, which allocates resources to provinces. This formula takes into account historical backlogs in health and education infrastructure, the welfare burden, and the number of school-aged children in the population of different provinces in allocating resources to provinces. Consequently, since 1994, the budgets of most provinces have increased by about 30% with more equitable funding allocations to provinces translating into more equitable financial allocations to poorer schools.

Provincial legislatures then decide on allocations to different sectors based on provincial priorities and needs. In this way, absolute allocations are decided by **provinces** based on their priorities, not by the national government, although national priorities inform these choices.

National departments do, however, provide norms and standards for the distribution of resources within a sector. For example, the *National Norms and Standards for School Funding* states that non-personnel expenditure in provincial education departments must be distributed so that 40% of the poorest learners will receive 60% of state resources in the form of funding.

2.6.2 Governance and resourcing for participation

The South African Schools Act (1996) provides for the establishment of a School Governing Body at each school, to promote good governance and participation in school management and administration. The Act makes discriminatory practices illegal at schools and allows all (public and independent) schools to supplement state funding with fees, as long as all parents in the school agree to (i) introduce fees and (ii) set the fee level. By law, this has to be done at a special meeting of parents. The fees raised are used to enhance the quality of education provision, and the correct fee exemption procedures must be complied with so that parents of learners at a school which has a set fee level may apply for exemption from fee payment if they cannot afford the fees. Currently, available data suggests that about one in twenty learners in the education system has applied for, and has been granted full exemption from school fees.

In spite of these provisions, discrimination still occurs in the system. The Department of Education has enlisted its partners in the civil society movement to plan against exclusion and to submit practical proposals for eliminating discriminatory practices such as learners being turned away from school for not having 'the right school uniform' or other such items which are costly and provide additional burdens for parent to bear. Monitoring systems have been set up to ensure compliance with the law which makes exclusion of learners of school-going age illegal. Proposals are being developed to reduce the private costs of education (related to uniforms, transport, and fees) borne by poorer parents and to strengthen compliance with policy and the law, which states that all learners aged 7 to 15 years must attend school.

In funding education, the challenge for the coming years will be to incorporate EFA objectives into provincial budgetary and fiscal processes so that goals are entrenched at provincial level.

In addition, the Government of South Africa has started on a large-scale expansion of social welfare grants and transfer payments to provide income support to a larger number of poor households through old age pensions, child support and income support grants. At the moment, the Child Support Grant is received only by eligible children aged less than 7 years. The proposal is to expand the coverage progressively of this grant to children aged over 7 years so that poverty alleviation may improve education and social outcomes of learners from deprived and destitute backgrounds. Currently, the Department of Social Development is working with the Department of Education to increase the receiving of this grant by those eligible for it through a comprehensive advocacy campaign. The receipt of such social grants, in the face of grinding poverty, especially if used productively, will improve access and participation rates in families, reduce drop-out rates and improve completion rates in the education system. Owing to levels of unemployment country-wide, in some households the only income is that of the grandparent and many children are supported by grandparents on an old age pension, particularly in rural areas.

Combined with the equitable distribution of resources (personnel and non-personnel) including nutrition initiatives, this income support intervention has the potential to increase educational and other social outcomes for learners from poor households, particularly those affected by HIV/AIDS.

3 Consultative processes in South African Education

3.1 South Africa's approach to consultation and stakeholder participation in the policy and planning process

One of the key commitments of South Africa's National Education Policy Act (1996) is the participation of stakeholders in policy development. The formulation of policies since 1994 has created structures and mechanisms for active stakeholder participation. Several national commissions have been formed to advise the Minister and the Department of Education to help in the development of policies and programmes at national and provincial level. For example, the South African Schools Act, 1996, elicited approximately 100 comments and 60 public hearings were held around the country.

Areas in which stakeholder participation have been sought include: policies on school management, evaluation, teacher development, provisioning, labour relations, management information systems, education financing, higher education, curriculum, physical resource planning, HIV/AIDS, early childhood development, further education and training, and general education. At the institutional level, policy frameworks have been established for the creation of participatory structures in early childhood, general, further and higher education institutions including schools and universities. For example, there are currently just under 30,000 school governing bodies responsible for a variety of functions including the supplementing of school funds, setting opening and closing times for schools, determining codes of conduct and policy for language of instruction and religious observance for learners, developing and enhancing the school, and promoting the mobilisation of energy and resources into the school.

Problems of capacity, genuine representation and effectiveness in stakeholder participation remain challenges and intensified and extensive training is necessary to make effective participation work in practice. Some provinces have set up Education and Training Councils as permanent structures for broad consultation with interested stakeholders on a variety of education and training matters. The success of these consultative mechanisms will be evaluated as their work unfolds.

It needs to be said, however, that the most vocal stakeholders are not necessarily the most representative of South African society and the inclusion of groupings representative of marginalised communities, particularly in civil society partnerships, is vital. There is an emerging need for vigorous and directed social mobilisation against discriminatory practices which keep learners away from schools and other education institutions. This will contribute to strengthening accountability within the education system and enhance the quality of education outcomes, particularly for poorer learners. In common with most of South Africa's education and training priorities, policies and programmes, the planning and implementation of EFA-relevant initiatives has been highly participatory with the involvement of learner, educator and governing body groupings, civil society groupings, unions and teacher associations, the private sector, and other stakeholder groupings. More can still be done, however, as rural communities are often too distant from the locus of decision-making and do not interact optimally in governance and management at education institutions because of language and other barriers. Resources and time continue to be devoted to strengthening participation of School Governing Bodies and improving democratic participation of communities in the development of quality education institutions that are resources for the very communities they serve.

4 Progress towards the EFA goals, including policies.

4.1 Early Childhood Development (ECD) provision

South Africa is committed to the EFA goal of " expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children" and has set a target of expanding provision of early childhood development through the provision of the Reception Grade to all 5 year-olds by 2010. This means that the average learner entering Grade 1 will have experienced 1.7 years of early childhood development and education by the time the Reception Grade is fully implemented as opposed to observed levels of one learner year in 2000. This represents a 70% increase in participation and it is equal to the coverage that will be achieved by other countries in the same income category as South Africa by 2010.

The provision of Early Childhood Development (ECD) is the provision for physical, emotional, developmental and cognitive needs for children aged between zero and nine years. The Department of Education recognises the importance of increasing early learning opportunities and critical early developmental needs given the fact that poverty levels in South Africa are high, particularly in African households. Children raised in these poor households are most at risk of infant death, malnutrition and stunting, poor adjustment to schooling, lower levels of achievement, and increased repetition and drop out from the education and training system.

In South Africa, poverty and living standards are strongly correlated with race, gender, mortality and morbidity rates, household location – provincial and rural/urban-household income and expenditure and employment rates, susceptibility to illness, access to basic and social services, and education levels. According to the 1999 Household Survey, female-headed households are twice as likely to be poor than male-headed households. This is due to a complex set of factors. Female-headed households are more likely to be in the rural areas where poverty is concentrated, female-headed households tend to have fewer adults of working age, female unemployment rates are higher and the wage gap between male and female earnings persists. Poverty is also concentrated among Africans - 52% of Africans, 17% of Coloureds, and less than 5% Indians and Whites are poor. While Africans make up 78% of the population, they account for 95% of the poor. 9% of under 5 year-olds are underweight, 23% are stunted (Demographic Health Survey 1998) and children are disproportionately represented among the poor. Almost 10 million (or 58% of) children are poor (using a relative poverty line which defines the poorest 40% of households as poor).

The Department of Education has been assigned responsibility for ECD for the 6 to 9 year-old cohorts while the Departments of Health and Social Development (formerly Welfare) are primarily focused on the 0 to 5 year-old cohorts. This means that 6 to 9 year-olds are covered under the provisions of the constitution guaranteeing a right to basic education (for Grades 1 to 3).

A feature of current developments within the ECD sector in South Africa is inter-sectoral collaboration in policy development and service provision. ECD interventions are also well placed to provide foundations for the development of values and principles of human rights and better prepare children for the transition to school. ECD interventions are beneficial to women and children in conditions of socio-economic deprivation, as they have the potential to break the cycle of intergenerational poverty, disease,

discrimination and exclusion from participating fully in social and economic opportunities.

4.1.1 History of ECD provision

The pattern of provision of Early Childhood Development in South Africa has been largely determined by historical discrimination along racial lines. In addition, quality assurance and national standards did not exist in ECD provision across the country. This failure of government investment gave rise to innovative developments initiated by Non-Governmental Organisations in practitioner training and development and curriculum design for ECD, although the result of several ECD initiatives tended to be fragmented and localised.

In a survey done in 1992, only 9% of all South African children from birth to six years had access to public or private ECD facilities. Only two per cent of under three year-olds were provided for by full-day care and home-based private- or community-funded facilities. One in three White infants and children receive ECD services, compared with about one in eight Indian and Coloured children and one in sixteen African children.

State provision of ECD was never universal and a nationwide audit in 2000 showed that just over 1 million learners (of those 8 million children aged 0 to 6 years old) were participating in ECD programmes. Over 75% of these children were paying fees showing that the majority of this provision was privately funded – unlike primary schooling where fees play a relatively small role compared to public funding. The nationwide audit found that the quality of ECD provision was highest for children from less poor households in urban settings where most (60%) of facilities were located. So provinces with large rural populations typically had fewer ECD sites and lower levels of provision. The implication of this is that the financial burden for ECD falls disproportionally on the poor. The findings of the *Nationwide Audit of ECD provisioning in South Africa* prompted the introduction of policy and plans to expand access and quality of public Early Childhood Development programmes in South Africa.

4.1.2 Progress with ECD provision - Access

In 2000, the *Nationwide Audit of ECD provisioning in South Africa* found that participation in ECD had expanded by about 50% from 1992 levels to 13% of all South African children aged 0 to 6 years (see chart below).

The Department of Education aims to increase ECD coverage by providing 1.7 learner years of quality early childhood development to every child in the country by 2010. This effectively means the expansion of participation from the current level of 13% to participation rates of about 27% of 0 to 6 year-olds in early childhood programmes, through the expansion of Reception year enrolment from levels of 226, 631 (in 2000) to 800,000 in 2010.

Figure 3. Participation of children aged 0 to 6 years in Early Childhood Development

Participation of children aged 0 to 6 years in Early Childhood Development programmes
by population group
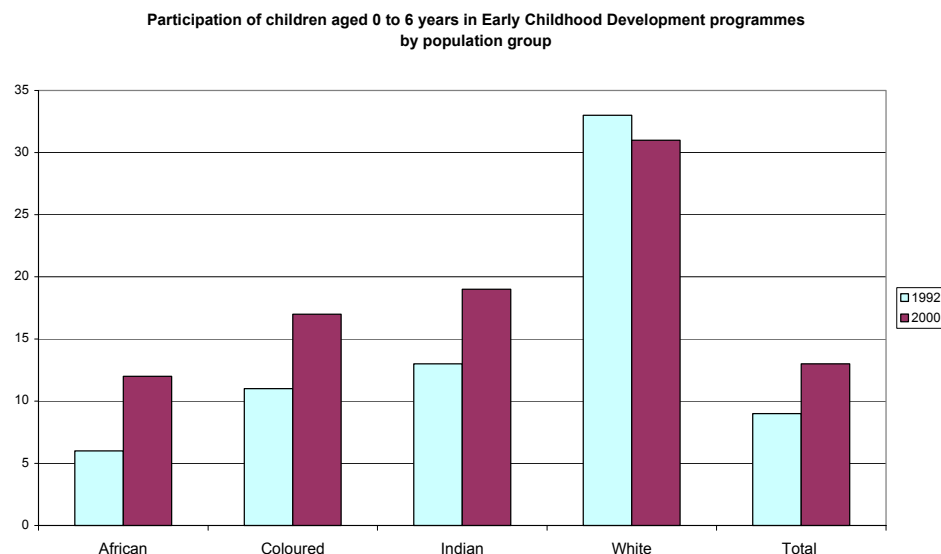
Sources: 2000 Statistics in Brief, Statistics South Africa, National Education Policy Investigation 1996, and *Nationwide Audit of ECD provisioning in South Africa*, Department of Education, 2001

4.1.3 Progress with ECD provision – Equity

Table 2. Enrolment in Early Childhood Programmes including reception year.

	1992		2000	
Population group	**Number**	**% 0 to 6 yr-olds**	**Number**	**% 0 to 6 yr-olds**
African	334750	6	637280	12
Coloured	54000	11	89458	17
Indian	17000	13	18552	19
White	160000	33	116770	31
Total	565750	9	862060	13

Source: National Education Policy Investigation 1996, and *Nationwide Audit of ECD provisioning in South Africa*, Department of Education, 2001

The expansion of participation in ECD programmes since 1992 has been mainly due to an increase in access of African learners to ECD. By 2000, African learner numbers had almost doubled, Indian learner enrolment remained stable, Coloured learner numbers increased by about 50%, and White learner enrolment declined. The chart below shows that in recent years, the ECD enrolment share of different population groups has begun to reflect the distribution in the general population with African learners being progressively better represented in ECD programmes.

Provision of structured Early Childhood Development programmes also phased out the phenomenon of high levels of under-aged enrolment in the first grade of primary schools as a means of child care where no alternatives existed in the education system.

Figure 4. Early Childhood Development enrolment share by population group for 1992 and 2000

ECD enrolment share by population group compared to population distribution of 0 to 6 year-olds

Legend: ■ 1992 enrolment share ■ 2000 enrolment share □ 2000 Population distribution
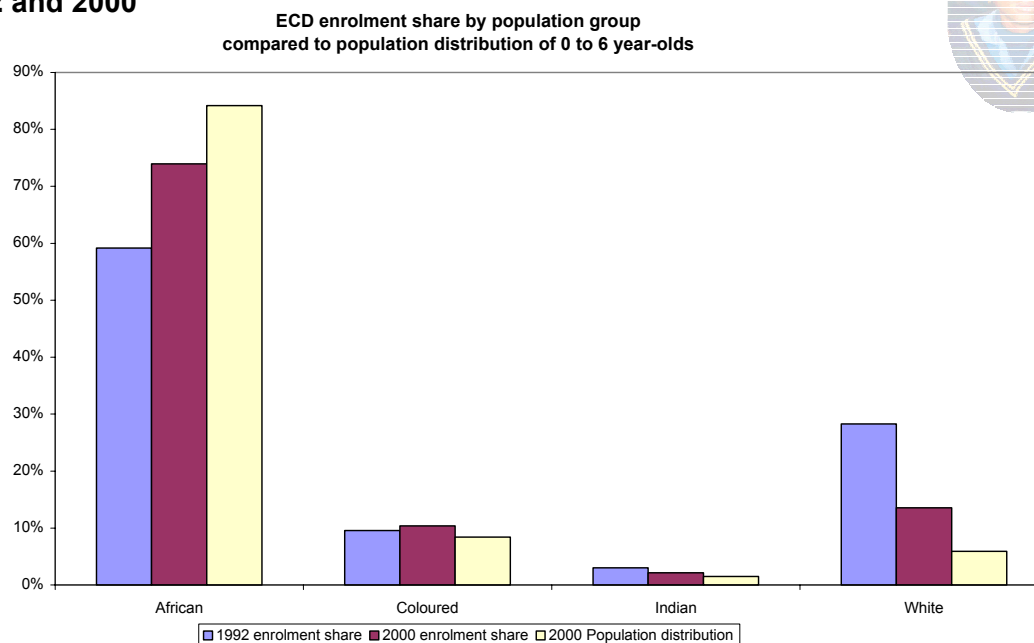
4.1.4 Plans for ECD provision for 2002 to 2015

Plans for universal ECD access by 2010: Following the audit, the Department of Education developed and released Education White Paper 5 which prioritises the following in relation to quality, access and equity issues in ECD provision and proposes:

1. **ECD for 5 year-olds:** The implementation of the pre-school Reception Year (grade R) for all five year-olds leads to the eventual provision of ten years of compulsory school education for all learners comprising one year of early childhood development called the Reception year. The policy goal is that by 2010, all learners entering Grade 1 will have participated in an accredited Reception Year programme which is 75% state subsidised (as opposed to 25% state subsidised in 2000). Another goal is that 1.7 learner years of quality early childhood development will be provided to every child in the country by 2010. This effectively means the expansion of participation from the current level of 13% to participation rates of about 30% of 0 to 6 year-olds in early childhood programmes.

2. **ECD for 6 to 9 year-olds:** Improvement of the quality of early childhood development programme offered at school from Grades 1 to 3 to enhance numeracy, literacy, life skills, values and language competencies of 6 to 9 year-olds.

3. **ECD for 0 to 4 year-olds:** Improving the quality of teaching and learning inputs and processes through inter-sectoral collaboration between health, education and welfare partners.

It is envisaged that the reception year provision will take place progressively from 2002 to 2010 and it will comprise three kinds of provisioning :
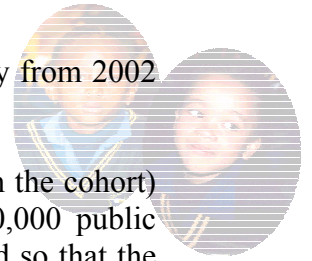
1. 90% coverage of the 5 year-old cohort (out of approximately 900, 000 in the cohort) in publicly funded provision of Reception Year programmes at all 20,000 public primary schools in South Africa funded by the state and poverty targeted so that the 40% poorest children will receive the highest per capita funding. The governance structure for ECD provision in this case would be a democratically-elected Governing Body and the policy gives incentives for individuals from learners' own communities to seek accreditation and become ECD practitioners, thus stimulating local economic opportunity and enhancing accountability of educators to the communities that they serve.

and

2. 10% coverage of the 5 year-old cohort divided between:

•   Unsubsidised independent provision of Reception year programmes; and

•   Publicly funded community-based provision (until 2004) of the Reception year and earlier ECD programmes at a limited number of sites, which are not within a reasonable distance to primary schools.

Enrolment in the Reception Year has steadily increased at the average rate of 9% per year since 2000 owing to strong enrolment growth (23% per year) between 1997 and 2000. Assuming that enrolment grows at a conservative 9% a year, the target for full enrolment in the reception year of all the 5 year-old cohort will be 2014, although more vigorous enrolment growth is likely to shorten this period (see the chart below).

Figure 5. Projections for full implementation of the Reception year part of Early Childhood Development provision in South Africa

Enrolment projections for full implementation of provision of Reception year as part of Sputh Africa's Early Childhood Development
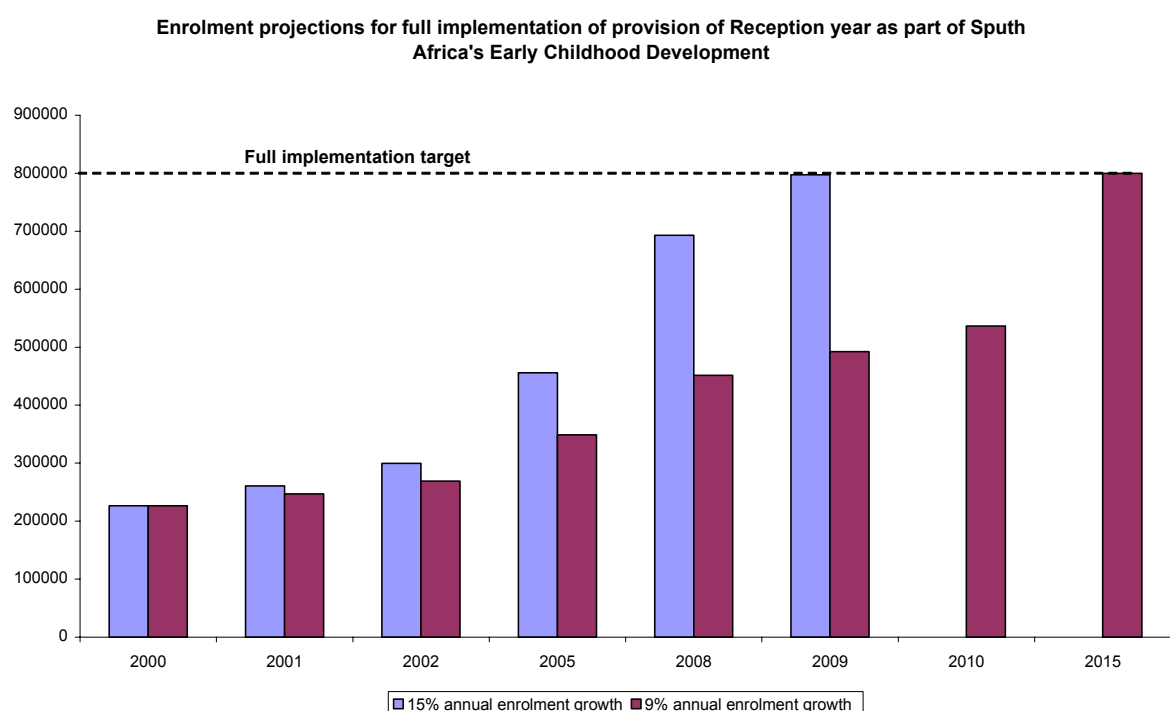
4.1.5 Plans for ECD quality and equity improvements by 2005

The target of provision will be the poor and vulnerable. Children from poor households; HIV/AIDS infected and affected children, and children with special education needs will be the target of public subsidies.

Between 2002 and 2004, the quality of provision will be enhanced through the development of norms and standards for practitioner development, registration and accreditation of ECD practitioners and providers, improved governance of ECD provision, introduction of relevant ECD curricula including values and human rights principles, interventions to improve teaching methods and other supportive inputs such as infrastructure, nutrition programmes, and curriculum support interventions in the sector. School based quality improvement initiatives will be implemented in 18 development nodes around the country initially and expanded to cover the system.

Plans are in place to expand the scope and coverage of the Primary School Nutrition Programme which at present reaches 4.8 million children so that its impact may be more felt and so that the poorest children in the system will receive nutritional support which will contribute to enhanced performance at school. The Department of Education recognises that the nutritional needs of secondary school learners will need to be addressed and the nutrition programme will be expanded to cover those secondary school learners in need.

The Takalani Sesame ECD Curriculum support, radio, television and outreach programme was launched in September 2002 as a pre-school curriculum resource for ECD practitioners and parents. It is designed to help children enhance their learning by introducing them to numbers, letters and simple words and phrases as well as developing indigenous language and life skills.

4.2 Basic (General) Education provision: policies and programmes

The EFA goal of "ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, shall have access to complete free and compulsory primary education of good quality" relates to the provision of **general or basic education of nine years' duration as a constitutional right** in South Africa. Bearing in mind that the priority in South Africa is the redistribution of resources for equitable education provision, completely free Education for All is made available to poor learners only. Within the constraints of the fiscus, arrangements have been made to ensure adequate education of high quality, which is free for the poor at both primary and secondary level. The challenge for education in South Africa is to ensure that these policy and legislative arrangements are adhered to.

4.2.1 Basic (General) Education provision

Basic or general education of nine years' duration in South Africa far exceeds the three to six years of primary education advocated by various global education development movements. Various initiatives, policies and programmes contrive to make the provision of basic education of high quality a reality for all learners (by 2015) are listed below.

South African education before 1994 was characterised by a fragmented system with different curricula for each of 15 different education departments, all catering essentially for the needs of the artificially divided labour market. After democratic elections, education reform imperatives required the construction of a national education system to overcome the results and effects of fragmented, discriminatory and incoherent systems, policies and processes of the apartheid era. Since then, South Africa has succeeded in achieving greater equity in the distribution of personnel related and non-personnel resources, as well as overhauling the curriculum into a more relevant and outcomes-based national curriculum framework. Performance has steadily increased along with an improvement in the amounts and targeting of resources towards needy learners, and, the public schooling system is increasingly strengthened by the participation of children across all class, race, and language groupings in the country.

Legislative frameworks and policies have been developed to facilitate and entrench change, new financing and funding systems (particularly for schools) have been set up for more equitable funding, and institutional and curriculum reform have been high priority areas for attention in the education reform process. The *Tirisano* (Working Together) Strategy launched in 1999 assisted in reinforcing messages about the key priorities in the implementation of education policies and programmes. Key priorities programmes of this strategy include HIV/AIDS, school effectiveness and teacher professionalism, reducing illiteracy, improving the outcomes of general, further, and higher education and training, and improving organisational effectiveness. Through the *Tirisano* strategy, concrete interventions were made to improve participation and performance levels in key subject areas, focusing development initiatives across sectors in key rural and urban development nodes, and improving outcomes of education interventions and service delivery.

Table 3. Average annual increase in per capita spending per school learner, 1991 to 2000

Western Cape	4.5%
Northern Cape	7.0%
Gauteng	7.6%
KwaZulu-Natal	8.8%
Mpumalanga	9.7%
Free State	9.8%
Eastern Cape	10.7%
North West	10.9%
Limpopo Province	11.9%
SOUTH AFRICA	**11.0%**
Average annual change in price levels	8.3%

4.2.2 Legislative and other mandates

In 1996, the South African Schools Act became law. The Act promotes access, quality and democratic governance in the schooling system. It ensures non-discrimination in education institutions and provides for two types of schools only - independent and public schools. Further, the Act makes schooling for all children aged 7 to 15 years compulsory, provides for the establishment of representative governing bodies for all schools, and through the school funding norms, prioritises redress and poverty targeting in the allocation of funds in the public schooling system where the poorest 20% of learners receive an allocation which is seven times that of the allocation to the 20% least poor learners, and makes provision for schools to supplement their funds with additional funds or by charging school fees (or both) for purposes of enhancing the quality of education. The Act allows for the supplementation of state funding through school fees at schools, provided that all parents and guardians agree to set fees at a special meeting, and if they set fees, to the fee level. Fees are considered supplements to state funding and are not compulsory. The National Norms and Standards for School Funding, 1998, a policy developed in terms of the South African Schools Act, also makes provision, and provides guidelines, for fee exemptions to be granted to learners, so that discrimination against, and exclusion of, learners who cannot pay fees is illegal. Exclusion of, and discrimination against pregnant learners, learners without resources such as school uniforms, learners with HIV/AIDS, and learners of a particular cultural, racial or language grouping is also illegal.

Monitoring, evaluating and ensuring compliance with these laws and policies will make up a large part of the work of the Department of Education in coming months, as discriminatory practices still occur in the system through inefficiencies in the education system or wilful non-compliance with these laws and policies. The National Education Policy Act, 1996, was designed to inscribe the policy making, legislative and monitoring and evaluation responsibilities of the Minister of Education, and to formalise intergovernmental relations between national and provincial education authorities. The Act provides for the formulation of national policies, norms and standards for education planning, provision, governance, monitoring and evaluation.

4.2.3 Progress with Basic (General) Education provision - Access

Basic education in South Africa far exceeds the three to six years of primary education advocated by various global education development movements and is currently nine years in duration. In the years following the democratic elections in 1994, declining levels of disruption and political unrest resulted in an increase in enrolment from the levels in the late 1980s. This expansion in enrolment was mainly to the result of African learners' entering the system in large numbers. Since then, policies, programmes and funding arrangements have been established to ensure that these gains in participation are sustained. Many of them are described below.

Monitoring and evaluation for optimal compliance is a necessary challenge for the education system so that barriers to access are identified before learners suffer incidents of discrimination which prevents them from full participation in schooling. For example, the Department of Education is currently developing systems for monitoring incidents of racism and exclusion at school level experienced by learners. In addition, special studies will be commissioned to investigate the practice of multilingualism at schools and the

role that school governing bodies play in developing different languages of learning and teaching. As a start, the revised National Curriculum Statement has been printed in 11 official languages so that all parents and school governing bodies will be able to understand the learning competencies their children will be able to possess by the time they complete their general or basic education.
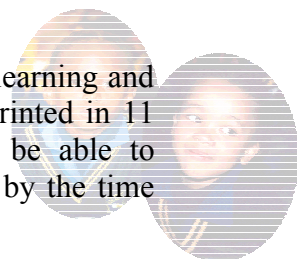
Compulsory non-discriminatory education: In South Africa, basic education is a constitutional right and schooling of nine years duration is compulsory for 7 to 15 year-olds. Exclusions and prevention of learner attendance at school for discriminatory reasons are unlawful. The Department of Education has, since 2000, run an information campaign on the rights of parents and learners seeking admission to eliminate barriers to access at the point of entry into the schooling system. In addition, a learner may not be suspended from class or denied access to cultural, sporting or social activities of the school, denied a school report or transfer certificates, or otherwise victimised on the grounds that his or her parent does not subscribe to the mission statement and code of conduct of the school, or has refused to enter into a contract in terms of which the parent waives any claim for damages arising out of the education of the learner. In addition, the governing body of a public school may not authorise or administer admission tests as documentation from previous school, identification documents, immunisation declarations and the application for admission are deemed sufficient for the application to be considered.

Language in Education Policy: In South Africa's recent history, a number of discriminatory policies and practices (with elements of discrimination against racial, cultural and language origin) have affected either the access of learners to the education system or their success within it. The Language in Education policy, 1997, recognises cultural diversity as a valuable national asset and promotes multilingualism in education with respect to South African Sign Language, and the 11 official languages in line with the Constitution of the Republic of South Africa, as well as languages used for religious purposes, languages which are important for international trade and communication, as well as Alternative and Augmentative Communication. The National Curriculum Statement for Basic Education provides for all learners from Grades R to 9 to offer at least two languages, while in Further Education and Training, all learners must take two languages, one of which must be the language of teaching and learning (or instruction). This enhances multilingualism, diversity and respect for different language traditions in a national context and provincial departments of education are obliged to make the necessary arrangements to ensure that the language requirements of learners are met at local level. School governing bodies, in determining the language policy of the school, must have concrete proposals on promoting multilingualism.

Inclusive education policy: The recently developed Education White Paper 6 on Special Needs Education makes provision for the elimination of barriers to education whether these barriers are related to disability, poverty, stereotyping, dropping out, an inflexible curriculum, inappropriate language and communication, unsafe environments, inadequate infrastructure, legislation and policies, and inappropriate capacity at management and learner household level. Inclusive education involves the identification of vulnerable learners and the integration of learners with barriers to education into mainstream educational institutions and contexts and the provision of practical and tangible support to enable the elimination of these barriers from the education process at all levels in the system from early childhood, through to general education, further education and training and higher education. This policy has implications for systems of education delivery, resourcing, decision making and support at local level and at provincial and national level. When fully elaborated, it will ensure that the diverse learning needs within the

system will be accommodated and addressed. This has implications for improving equity in the education system, as poverty in South Africa is related to social and economic vulnerability, disability and illness.
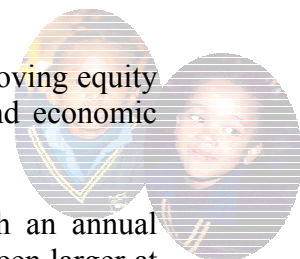
Participation rates: Since 1990, primary enrolments have stabilised with an annual average increase of less than 0.1%, while secondary enrolment growth has been larger at 2.7% per year, and overall school enrolment has increased by just less than 1% per year on average. The low primary enrolment rates are due to the decline in fertility rates in the general population in the last few decades as a result of increased contraception and higher education levels. The growth in school enrolment has been mainly due to African learners entering schools at the rate of 1.5% per year since 1999, especially in the years since the democratic transition in the country.

Table 4. Enrolment by phase and population group

	Phase	AFRICAN	COLOURED	INDIAN	WHITE	ALL
1990	Primary	5 650 366	613 215	141 746	534990	6940317
1995	Primary	6 597 524	673 052	181 361	608568	8060506
2001	Primary	6 007 377	578 612	117 223	361489	7064701
1990	Secondary	2 003 904	228 172	91 355	389244	2712675
1995	Secondary	2 936 118	260 791	106 317	401188	3704413
2001	Secondary	3 144 820	256 095	101014	250656	3752585
1990	All schooling	7 654 270	841 387	233101	924234	9652992
1995	All schooling	9 533 642	933 843	287678	1009756	11764919
2001	All schooling	9 152 197	834 707	218237	612145	10817286

Source: Research Institute for Education Planning, 1990 and 1995; Department of Education, 2001
Note. The large drop in enrolment figures particularly for white learners between 1995 and 2001 may be as a result of
data problems as the population figures for white school-aged children increased by just under 100,000 in the same time.
The data need further verification from the national Census 2001 results when they are released in 2003.

South Africa, in common with her other Southern African neighbours, has high enrolment rates for primary and secondary schooling, even higher than some developed countries, although secondary participation rates show some cause for concern, particularly if combined with the evidence of drop-outs in the system. On average, for every 100 children that are in the school system in Grade 1, there are 52 in Grade 12. This trend can be linked to a large drop-out rate - especially evident in poorer rural communities. In spite of this, provinces have been successful in improving pass and progression rates as well so that the high Gross Enrolment Rates(GER) of more than 120% in the mid-1990s have decreased showing efficiency gains and a greater incidence of appropriately-aged learners in the education system. The figures below show the gross and net participation rates for primary and secondary enrolment since 1991.

Net Enrolment Rates (NER) are estimates of appropriately-aged participation in education and the NER is calculated by dividing the appropriately-aged enrolment for the phase with the appropriately-aged population. For the basic education NER, the data used was for population and mainstream school enrolment aged between 7 and 15. Net participation rates in schooling in South Africa have been consistently high since the mid-1990s at levels of about 95%, although provincial variations occur.

Out-of-school youth are a particular concern in the system, as some of these youth are disabled and are not accommodated in the mainstream schooling system. An audit of special schools will yield more detailed information on the enrolment of learners by age at special schools which will increase the overall net schooling enrolment rates. Current estimates are that about 280, 000 appropriately-aged disabled children are not in

mainstream primary schooling, whereas about 100 000 out of school youth were identified by the 1996 national Census. The latest estimates of out-of-school children of primary school-going age in 2001 are that the 1996 figure has declined to about 250,000 owing to increased net participation of 13 percentage points at primary level. The results of the national 2001 Census will be used, when released, to verify this estimate.

Figure 6. Gross Enrolment Rate (GER) from 1991 to 2001 in South Africa

Gross Enrolment Rates from 1991 to 2001 in South Africa
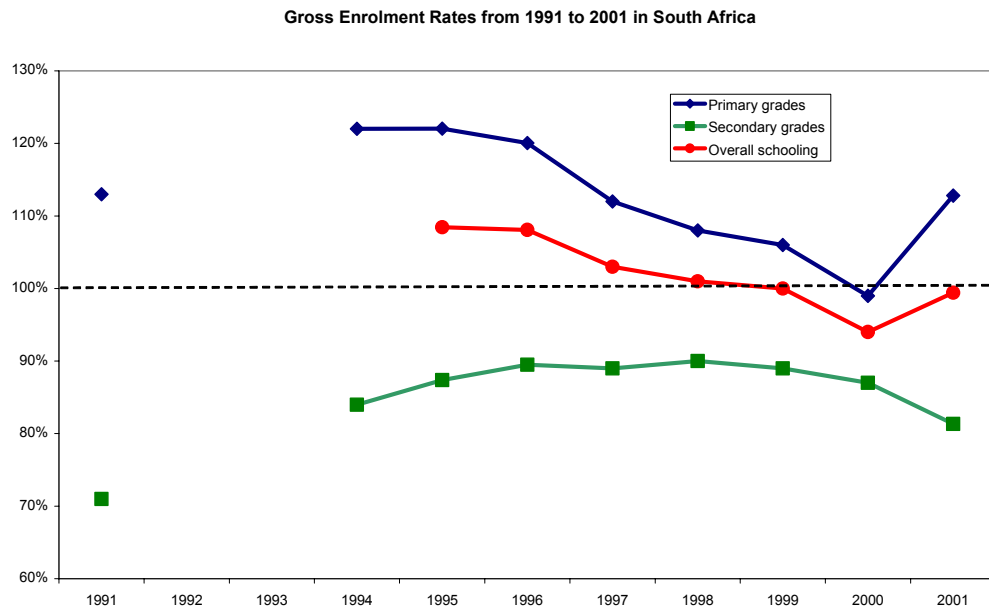
Gross Enrolment Rates compare the enrolment in the education system to the appropriately-aged cohort in the population and give an estimate of coverage in the system whereas Net enrolment rates give a more accurate indication of the school-aged enrolment as a proportion of the school-aged population in the country.

Figure 7. Net Enrolment Rates for basic (general) education of nine years duration in South Africa

Enrolment rates for General Education and Training (nine years of schooling) in South Africa
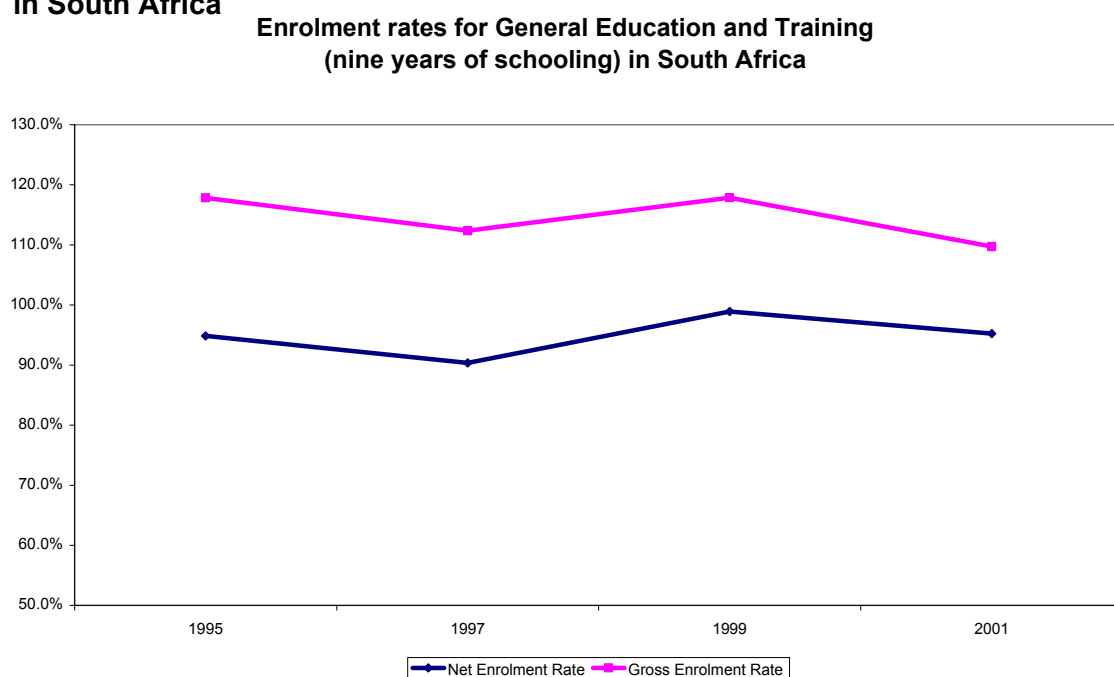
4.2.4   Progress with Basic (General) Education provision – Equity
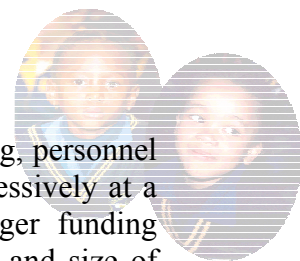
Before 1994, education was very inequitable in terms of provision, resourcing, personnel and capacity. Since the 1994 elections, this situation has been tackled aggressively at a national level, through the Equitable Shares Formula, which directs larger funding allocations to needy provinces (based on infrastructure and other backlogs and size of school-aged population). This has improved inter-provincial equity. As well as this, intra-provincial equity has been enhanced through the Norms and Standards for School Funding, which came into effect in April 1999. These norms ensure that the poorest learners receive seven times more of non-personnel funding per head than the least poor in a province, contributing to intra-provincial equity. Both of these mechanisms have resulted in the growth in average spending per capita in recent years and bode well for poor learners within the schooling system.

In 1998, rationalisation and redeployment equalised the Learner: Educator ratios of schools across the country and eliminated the apartheid legacy of under-resourcing of schooling in terms of personnel for certain population groups relative to others. Provincial and national governments in the process of budgetary reform, also adopted targets for personnel and non-personnel spending to allow increased spending on non-personnel education inputs such as teacher development, resource materials, Learner Support Materials (LSMs) and infrastructure. A norm of 85:15 for provincial education systems for personnel to non-personnel expenditure was set. Since 1998, the personnel percentage has dropped from 91% to 86% in 2002, enabling an expansion in LSM, capital and quality improvement interventions.

Education funding policies are being reviewed to ensure that they address the needs of the poor. Fees are not compulsory, but where schools set them, they supplement state funding. Fees generally constitute only a portion of the costs borne by parents in getting their children to school and paying for uniforms. The Department of Education is currently investigating ways of reducing the costs of uniforms and supplementary education supplies borne by parents of the poorest learners, as too often, these costs are higher than they need to be because the market price of these items is not competitively determined.

Learner: Input ratios have improved in the system since 1996 and access to key physical infrastructure such as toilets and sanitation has improved. Many of these interventions have arisen from concerted effort to facilitate integrated development with partner departments responsible for water provision and sanitation. However, challenges still remain. The high investment made in education sometimes does not translate into service provision and backlogs persist, resulting in some learners still being taught in conditions of deprivation. Investment in infrastructure, Learner Support Materials, equitable teacher allocation, upgrading and development remains high on the education agenda as shown by the growth in investment and information on service delivery shown in the following tables sourced from public expenditure and management system records as well as the National School Register of Needs Surveys, 1996 and 2000.

Table 5. Public schools with telecommunications, water, power and toilets, 1996 and 2000

	Telecommunications				Water				Power				Toilets			
	1996	%	2000	%	1996	%	2000	%	1996	%	2000	%	1996	%	2000	%
EC	1 117	19	3 691	59	3 365	57	3 689	59	1 316	22	2 474	40	4 404	75	5083	81
FS	745	26	1 471	59	1 769	62	1 689	68	1 207	42	1 348	54	2 384	83	2173	87
GT	1 985	91	2 110	96	2 045	94	2 145	97	1 876	86	2 056	93	2 121	98	2180	99
KZN	1 788	35	3 871	68	3 366	65	3 912	68	1 953	38	2 485	43	4 669	90	5401	94
MP	735	39	935	52	1 371	73	1 117	62	956	51	921	51	1 656	88	1691	93
NC	403	77	442	92	472	90	468	97	426	81	425	88	514	97	470	97
LP	1 561	38	2 095	49	1 427	34	2 690	63	885	21	2 175	51	3 788	91	3943	92
NW	879	37	1 321	57	1 948	82	2 060	89	1 053	45	1 486	65	2 236	94	2118	92
WC	1 606	94	1 562	98	1 603	94	1 561	98	1 502	88	1 521	96	1 697	100	1591	100
SOUTH AFRICA	10 819	41	17 498	65	17 366	65	19 331	71	11 174	42	14 891	55	23 469	88	24 650	91

Source: Department of Education, Report on the School Register of Needs 2000 Survey

Table 6. Schools with computers, 1996 and 2000

	Computers*				Learner-computer ratios	
	1996	%	2000	%	1996	2000
EC	205	4	281	5	1 768	373
FS	154	5	214	9	601	181
GT	594	27	913	41	333	65
KZN	381	7	572	10	1 103	228
MP	114	6	157	9	774	298
NC	105	20	122	25	255	95
LP	131	3	198	5	2 527	463
NW	126	5	174	8	754	254
WC	525	31	720	45	274	66
SOUTH AFRICA	2 335	9	3 351	12	726	164

Source: Department of Education, Report on the School Register of Needs 2000 Survey
Computers for teaching and learning

Table 7. Learner- educator and Learner-classroom ratios in public schools, 1996 and 2000

	L: E 1995	L: E 2000	L: E Change	L: C 1996	L: C 2000	L: C Change
EC	40	32	-8	55	43	-12
FS	33	33	0	38	33	-5
GT	28	31	3	34	33	-1
KZN	36	36	0	45	40	-5
MP	36	34	-2	45	48	3
NC	27	30	3	32	26	-6
LP	37	33	-4	49	40	-9
NW	30	30	0	40	34	-6
WC	26	30	4	33	31	-2
SOUTH AFRICA	33	33		43	38	-5

Source: Department of Education, Report on the School Register of Needs 2000 Survey

Table 8. Learner Support Materials (LSMs) including textbooks and stationery: budget allocations from 1998 to 2001

	1998/99 R' millions	1999/00 R' millions	2000/2001 R' millions	2001/2002 R' millions
EC	42.1	120	155.5	180.0
FS	26.9	72.1	75.7	77.8
GT	52.3	95.4	153.4	176.0
KZN	72.6	156	103.3	193.9
MP	39.8	53	54.4	86.5
NC	6.6	27.7	10.7	28.9
LP	51.5	148.3	244.2	269.4
NW	45.9	65.2	53.0	53.6
WC	54.9	57	70.0	96.8
SOUTH AFRICA	392.6	794.7	920.2	1 162.8
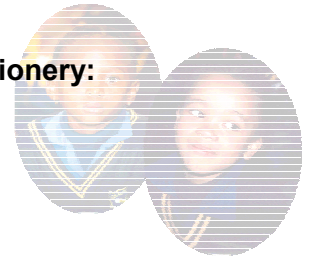
Figure 8. Actual and budgeted capital expenditure from 1998/99 to 2004/5

Total Actual and Budgeted Education Capital Expenditure, 1998/99 to 2004/5
(R million)
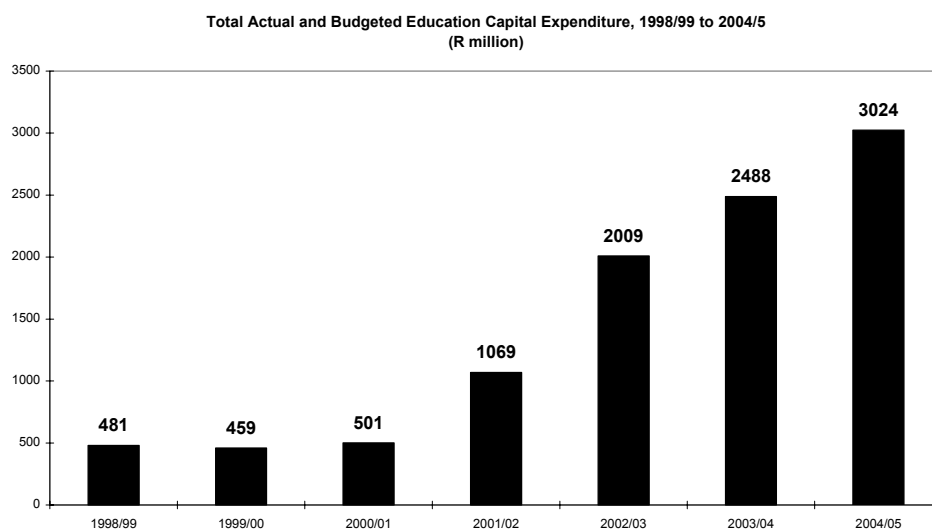
Figure 9. Infrastructure delivered and planned delivery

Infrastructure delivered and planned delivery : Classrooms, Toilets, Water
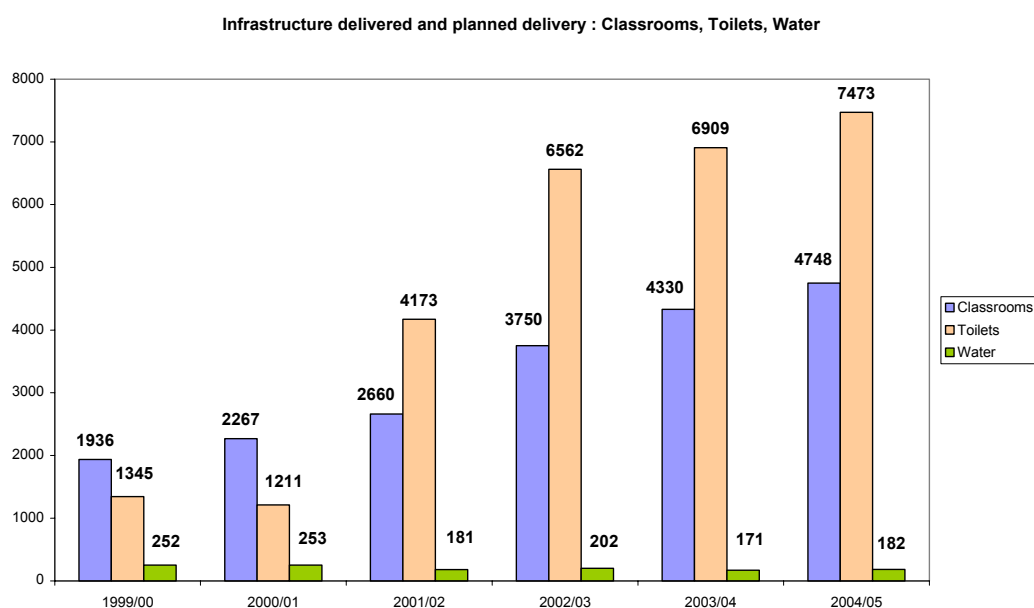
Progress in Basic (General) Education provision – Efficiency

In recent years, efficiency gains have been made throughout the schooling system with declining repetition and improved learner flow through the education system. The chart below shows the efficiency gains that have been made to reduce the loss of resources in the system and to enhance quality.

Several initiatives and policies have been embarked on. The admission policy and age–grade norms were declared policy in 1998 and set norms for learners to proceed with their age cohort throughout their schooling career. The norms encourage schools to accommodate learners and ensure (parent and educator) support so that they keep up with their peer group. The norms, however, make concessions for repetition no more than four times from Grade 1 to 12, and the practice of automatic promotion is not allowed. In addition, the admissions policy sets out admissions procedures to be followed for public schools. It allows the admission of learners turning six by June of the year of admission, and normalises the patterns seen in the early 1990s in Grade 1. Under-aged learners and repeaters in Grade 1 gave rise to 60% over-enrolment in the mid-1990s, a position which has largely been unwound.

The chart below shows the fruits of efforts made since 1994 to improve efficiency in the schooling system. It shows that the proportion of appropriately aged learners has increased since 1995, suggesting improved efficiency of flow through the system. The efficiency gains are most evident in the earlier primary grades, particularly in Grade 1. The higher up and the flatter the line, the more efficient the education system. More robust and objective measurements of drop-out and repetition will be made in 2003 to strengthen the monitoring of efficiency in the education system.

Figure 10. Efficiency gains in schooling in South Africa

Efficiency gains since 1995: Proportion of appropriately-aged learners by grade, from 1995 to 2001
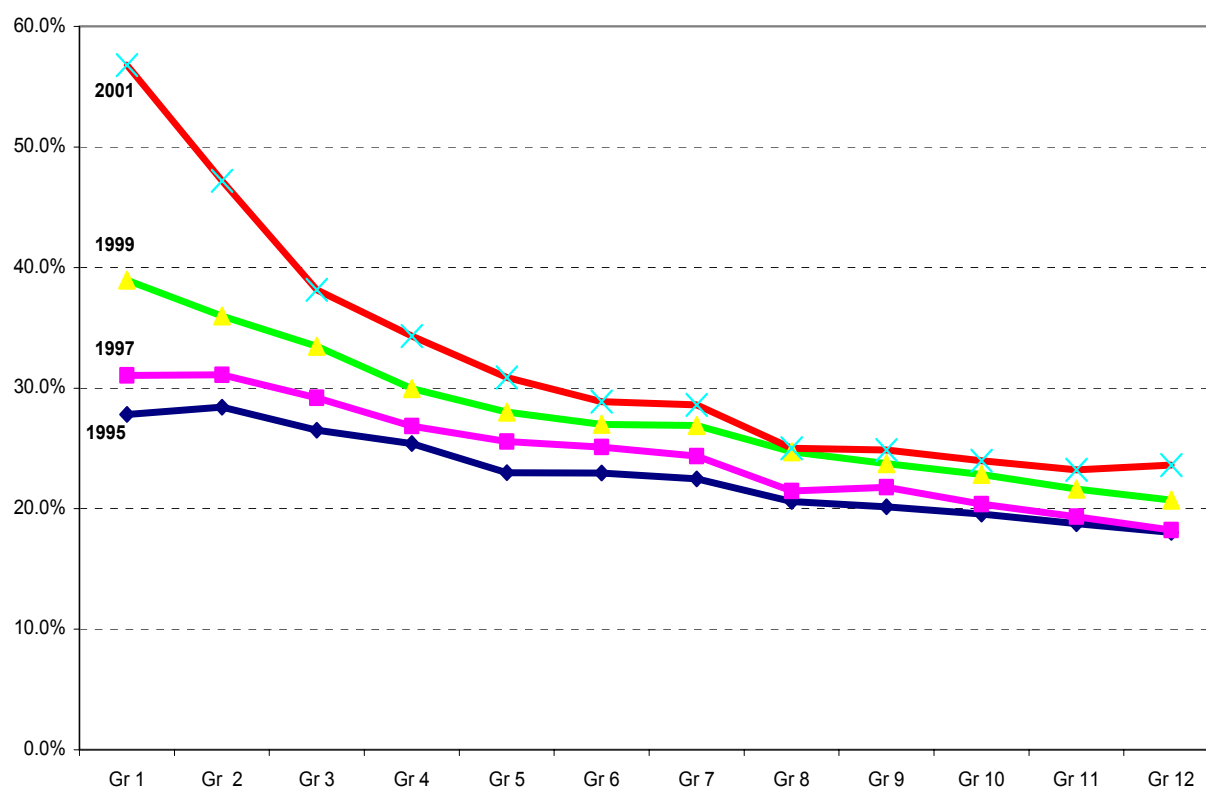
4.2.6 Progress with Basic (General) Education provision – Quality

4.2.6.1 Input quality

Recent gains in the South African education system include high participation rates (of as many girls as boys), expansion in access, improvement in efficiency, and consistent growth in spending on different education inputs. The Department of Education recognised that the curriculum influences the quality of education outcomes and the curriculum has been modernised and changed to make it more relevant to the needs of citizens of a developing country aiming to achieve sustainable economic and development growth. The revised National Curriculum Statement lists learning outcomes for Languages, Mathematics, Natural Sciences, Social Sciences, Arts and Culture, Life Orientation, Economic and Management Sciences, and Technology for all learners in Grade R (Reception year) to Grade 9. By the time they complete Grade 9, learners have to be competent in life skills and in dealing with health and social development issues such as HIV/AIDS. They are expected to be tolerant and to respect language and other traditions different from their own.

Teaching quality has received much attention and upgrading of teachers continues with an annual increase of just over 2 percentage points in the proportion of qualified teachers in South Africa since 1994, although the table below shows that some provinces start off from a fairly high baseline of qualified educators. Alongside this, school effectiveness and teacher professionalism initiatives have enabled management development, teacher support and development in subject content and methodology in recent years. Scarce skills areas such as Mathematics, Science and Technology have been targeted for particular attention and teacher development and an improved flow of teaching resource material and school kits in this area have been strengthened in recent years. 13,000 teachers have been offered bursaries to study for the National Professional Diploma in Education over two years to increase the proportion of appropriately qualified educators in the teaching service and 1,800 teachers will graduate from specialist Mathematics, Science and Technology re-skilling programmes by the end of 2002.

Figure 11. Average annual increase in the proportion of state-paid qualified teachers since 1994 (in percentage points)

Average annual increase in the proportion of qualified teachers (percentage points) since 1994
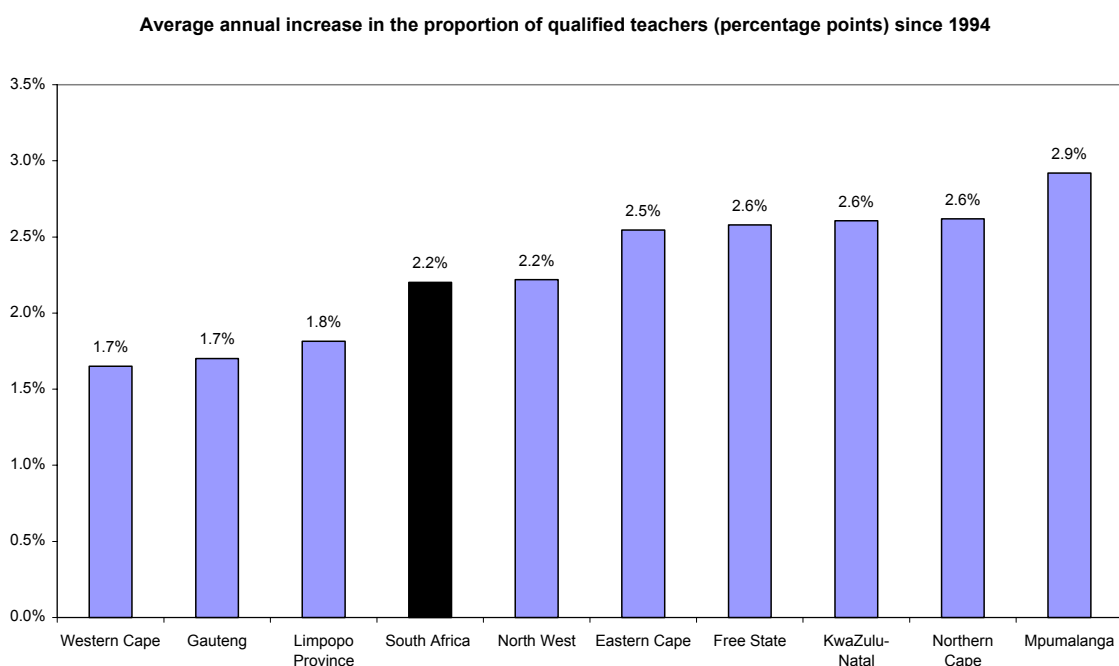
Teacher discipline continues to receive attention within the education community, particularly within teacher unions and associations. Cases against teachers are monitored by the Department of Education and the South African Council for Educators which sets, maintains and protects ethical and professional standards in the teaching corps and may deny serious offenders the right to teach. National Teaching Awards are presented annually by the President of the Republic of South Africa to acknowledge the contribution of teachers who excel in management, teaching practice, leadership and commitment in the education system.

The South African Schools Act establishes governing bodies to help principals to administer schools property, establish a code of conduct, school starting times, and in some cases, administer the schools' financial affairs. The establishment of these School Governing Bodies comprising parents, educators, non-educator staff, and (in secondary schools) learners immediately created a challenge for skills development in management and governance so that all governing bodies could function properly, democratically and legally. This training continues to be carried out as new members are elected, and the contribution of a governing body to school organisation, safety and stability cannot be overstated. In addition, participation in running the affairs of just under 30,000 schools also enables more communities to be involved in a practical way in quality improvement and local accountability in the education system.

Table 9. Trends in the proportion of qualified state-paid educators/ teachers by province

	1994	1998	1999	2000	2001	2002
Eastern Cape	58.5%	70.4%	71.3%	73.6%	73.8%	81.2%
Free State	58.1%	70.6%	73.1%	75.5%	74.3%	80.1%
Gauteng	78.4%	88.6%	89.0%	89.3%	90.5%	92.7%
KwaZulu-Natal	59.3%	67.3%	70.3%	75.9%	72.3%	82.6%
Mpumalanga	61.5%	73.4%	78.1%	82.1%	79.5%	85.5%
Northern Cape	68.7%	80.4%	77.2%	79.1%	83.3%	94.2%
Limpopo Province	65.3%	79.3%	79.5%	78.8%	82.5%	78.1%
North West	51.5%	65.0%	57.6%	61.2%	59.9%	76.8%
Western Cape	77.1%	87.4%	87.0%	88.8%	89.3%	90.6%
South Africa	64.2%	74.7%	75.3%	77.6%	77.6%	83.6%

Source: Department of Education, Personnel Salary Administration System (PERSAL)

4.2.6.2 Output quality

A national Systemic Evaluation system has recently been set up for quality assurance purposes to monitor and evaluate the performance of learners in the system in key learning areas. When fully elaborated, a national sample of learners will be monitored at Grades 3, 6, and 9 and learner performance in key learning areas will be tracked over time to monitor trends in learning outcomes. The Grade 3 assessment scores for the first Systemic Evaluation exercise, held in 2001, show that competencies innumeracy in Grade 3 (9 year-old cohort) are low and require aggressive intervention. The collection of additional data related to the milieu of learners, school processes, language of learning and teaching, resource levels at schools, as well as learner performance enables the identification of those factors which most affect learner performance in the sample. The

Whole School Evaluation framework launched in 2000 is aimed at evaluating different aspects of school functionality, school management and governance, safety and discipline, resourcing, performance, and the quality of teaching. Evaluation by external evaluators forms the basis for school development and improvement plans and activities and enhance quality in the system. Together, the results of the evaluation exercises indicate where attention should be paid in terms of improving learner performance and achievement and enhancing quality in the system.
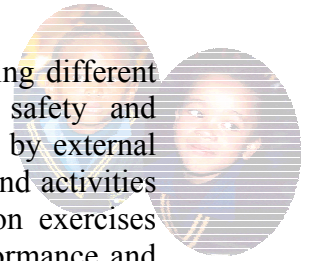
Performance in the Grade 12 Senior Certificate has improved with a significant improvement in pass rates in recent years from 53% in 1995 to 62% in 2001. The examinations were recently subjected to a Quality Assurance exercise by the Scottish Qualifications Authority, which certified the examinations as being of high quality. The challenge for the Department of Education is to ensure that these pass rate increases are achieved with concurrent increases in the quality of the passes and increases in the percentage of the actual size of the examination cohort who passes so that Education for All in the cohort becomes a reality.

Table 10. Average annual change in the Senior Certificate Examination pass rate

	Pass rate change		
	1995-1999 (percentage points)	1995-2001 (percentage points)	1999-2001 (percentage points)
Eastern Cape	-1.91	-0.39	2.71
Free State	-2.28	1.10	8.42
Gauteng	-0.45	2.52	8.27
KwaZulu-Natal	-4.86	-1.13	6.03
Mpumalanga	2.54	1.42	-0.69
North West	-4.33	-1.14	5.19
Northern Cape	-2.91	0.84	9.95
Limpopo Province	-0.41	3.42	10.98
Western Cape	-0.90	0.12	1.96
National	**-1.37**	**1.22**	**6.41**

Improving the quality of subject content knowledge and teaching practice in the scarce skills areas of mathematics and science is the challenge for the next decade – particularly accommodating the language requirements and needs of learners in earlier grades. Drastic interventions to support the revised curriculum will be needed to reverse these trends which relate to the scarce skills areas required for development. The charts show why the Department of Education is concerned about poor performance in Mathematics in the system.

Figure 12. Average Grade 3 performance in key learning areas

Average Grade 3 learner scores by province in key learning areas, 2001
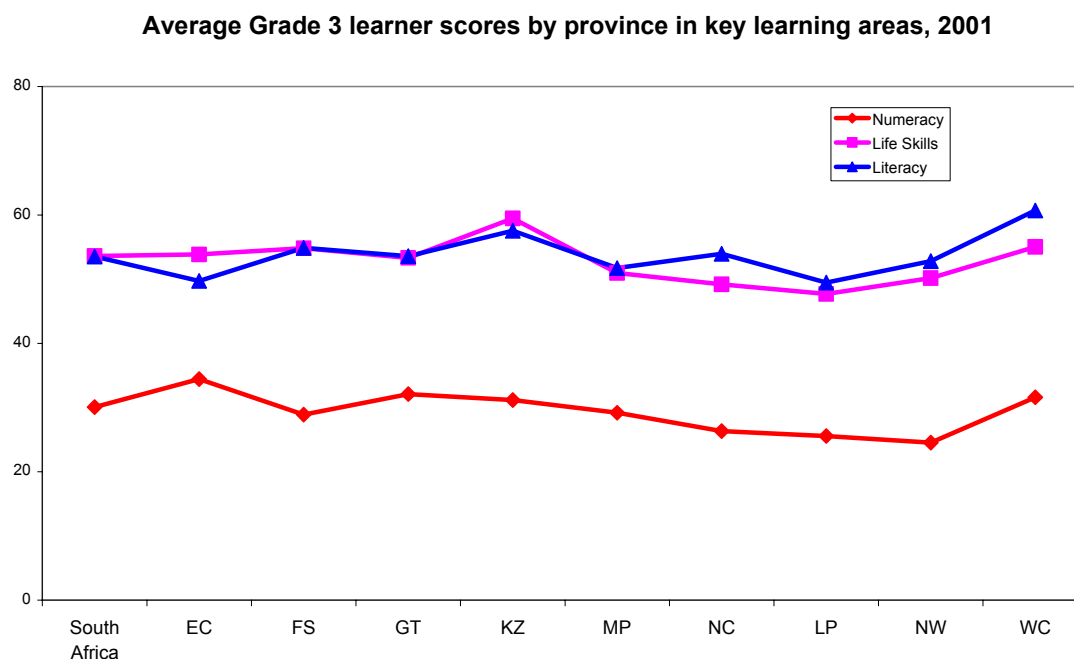
Source: Department of Education, Grade 3 National Systemic Evaluation Report, 2002

4.2.7 Progress and plans for Basic (General) Education provision for 2002 to 2015

By 2015, it is envisaged that compulsory basic education will be ten years in duration, including the Reception year is when it is fully implemented. This is in contrast to the current nine years of compulsory schooling. Various initiatives, policies and programmes contrive to make the provision of quality basic education a reality for all learners (including adult learners) by 2015 and are listed below.

Four key deliverables by 2008 include the development of Learning Programme Policy Guidelines and sample Learning Programmes, a revised policy for development, selection, procurement, distribution, and utilisation of Learning Support Materials, a structured in-service programme for classroom educators, school management teams, and departmental support personnel, and an effective monitoring and evaluation system to ensure the curriculum is provided in an appropriate way with the desired outcomes.

The development of an exit-level General Education and Training Certificate will also have been completed by 2015 as a useful pre-Grade 12 signal of competence and ability for employers of learners leaving the system after the compulsory general or basic education phase of their education which ends at ABET Level 4 or Grade 9. This will improve the labour market outcomes for the 200,000 candidates who, despite having

completed Grade 9, do not pass the Senior Certificate Examination. The GETC will therefore enhance the labour market participation of young people in South Africa.

The revised National Curriculum is at the heart of education transformation and it is designed to produce independent critical thinkers, who can solve problems and make a meaningful contribution to our society. An outcomes based approach, known as Curriculum 2005 spells out the general and specific outcomes envisaged for every learning area and grade. The specific outcomes are derived from the cross-field critical outcomes, which are drawn from the Constitution of the country. Curriculum 2005 comprises eight learning areas, which are intended to provide a basis for lifelong learning and sustainable development. These are: Language, Literacy and Communication; Technology; Human and Social Sciences; Natural Sciences; Life Orientation; Mathematical Literacy, Mathematics and Mathematical Sciences; Economic and Management Sciences; and Arts and Culture. The emphasis in the curriculum is on the acquisition and development of knowledge, skills, values and attitudes.

The Department is currently developing and implementing strategies for: strengthening teacher development; enhancing learner performance in key subjects; and linking teacher development to teacher performance and career development in the education system.

4.2.8 Plans for Basic (General) Education quality improvements by 2005

Resourcing financial management and quality improvement in the system: Support for school management (particularly for female principals), governance, HIV/AIDS interventions, literacy, values in education and organisational effectiveness has been made possible in collaboration with the national Treasury using special conditional grants. These Financial Management and Quality Improvement Grants have been used to fund special interventions for the 2002 to 2005 period and indications are that they will continue to be funded after this period for continued quality improvement in the system. Funding is in the region of R224 million rising to R263 million in the 2005/6 financial years. The priority areas include:

i.   School effectiveness. In these interventions, improvements in classroom management, teacher development, governance improvement, Whole School Evaluation and development, safety in schools, access to schooling, and enhancing the tone and physical condition of the learning and teaching environment, continue to be targeted for intervention.
ii.   Improving literacy programme implementation, co-ordination and graduate output.
iii.   Improving the Further Education and Training (FET) system through restructuring, introduction of a relevant FET Curriculum, specific improvement in learner participation and effective teaching of Mathematics, Science and Technology and targeting female learners to enter gateway subjects and critical professions, improving the administration, credibility and performance in the Grade 12 Senior Certificate Examinations.
iv.   Improving organizational effectiveness including management and planning tools, Learner Support Material provision and retrieval, personnel, procurement and financial and management systems.
v.   Enhancing values in education including religion in education, multilingualism, history and values in education initiatives as well as the introduction of youth development programmes focusing on extra-curricular activities such as music, sport, art and culture, including indigenous games.

vi.   Enhancing HIV/AIDS interventions through providing life skills competencies through the National Curriculum.

Table 11. Allocations to provincial education departments for financial management and quality improvement

	2002/3 R ' 000	2003/4 R ' 000	2004/5 R ' 000	2005/6 R ' 000
Eastern Cape	41 500	43 367	45 969	48 727
Free State	14 132	14 768	15 654	16 593
Gauteng	27 591	28 833	30 563	32 397
KwaZulu Natal	49 575	51 805	54 914	58 209
Mpumalanga	16 375	17 112	18 139	19 227
Northern Cape	4 262	4 454	4 721	5 004
Limpopo Province	35 218	36 803	39 011	41 352
North West	17 946	18 753	19 878	21 071
Western Cape	17 721	18 519	19 630	20 808
South Africa	224 320	234 414	248 479	263 388

Monitoring and Evaluation: Tracking the performance of the system and the quality of learning outcomes in terms of social and economic contributions to society is a weakness in the system. Planning and resource allocation decisions depend heavily on this and the monitoring and evaluation capacity has been strengthened to improve the measurement and credibility of information in the system, and measure the trends in education provision at national and sub-national level. Agreement with the national Treasury on key indicators for medium term (3-year) planning has been reached with all nine provincial education departments adopting a system for standardised reporting. Reporting standards will be in place from 2003 to ensure comparability of data across years and key surveys will be carried out to supplement data within the system (on aspects of learner performance, learner dynamics, institutional conditions and context) and improve the quality of planning decisions. Process monitoring and evaluation exercises contribute to improved performance and retrieval of textbooks by schools is regularly monitored along with school readiness for the first day of school. The latter receives a high profile in national newspapers with Ministers and senior politicians visiting and reporting on their findings at a sample of schools on the first day of each school term.

Planning capacity: The Department of Education will more accurately develop a demographic model to estimate the demand for education and training in the future to answer key planning questions. In addition, specific poverty alleviation and poverty-targeting ability and capacity have been prioritised for development and strengthening within the system. To date, 45 participants have undergone an applied economics in education postgraduate programme and 8 more will participate in a similar programme co-ordinated and developed by the SADC Human Resource Development unit in partnership with three African universities in Mozambique, Tanzania and South Africa. As skills in education planning are scarce, the Department of Education is developing a comprehensive strategy to engage key national and international education partners in further expanding the skills base of education planners in the country. This strategy will be implemented by 2005.

Strengthening policy compliance: South Africa's education system is governed by a set of policies that prioritise redistribution, redress and poverty targeting of resources. However, compliance with these policies is emerging as a new challenge for the system. Monitoring and evaluating policy compliance is a key function of the Department of Education and several interventions have been made in enforcing policy compliance and eliminating discriminatory and illegal practices at education institutions. In addition, new systems (such as attendance monitoring systems) will be developed for learner and educator attendance at local level.
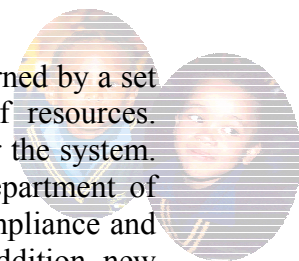
Quality of teaching: In order to improve the quality of education outcomes of poor learners in particular, the Department of Education has developed policy to allocate more teaching resources to those who need it most, expanding the current poverty targeting of non-personnel resources to include a percentage of personnel resources (starting from 5% of personnel resources) which should be allocated on the basis of need. Other inputs which contribute to education outcomes are also poverty targeted, including the provision of early childhood and inclusive education programmes. Teacher development programmes will in the medium term, focus on sustained subject content and teaching practice enhancement as well as in-school interventions. Plans are being considered for the development, use and distribution of resource materials and textbooks for delivery of the curriculum for schools that may then supplement these materials if necessary. It is envisaged that these resource materials would be cost effective and would include materials for the use of teachers and learners.

HIV/AIDS interventions: The National Policy on HIV/AIDS for Learners and Educators in Public Schools, and Students and Educators in Further Education and Training was released in 1999. The policy establishes the basis for increasing knowledge on HIV/AIDS through schools and the revised National Curriculum, reducing discrimination against those affected by HIV/AIDS and suggests universal precautions to be taken for the safety of learners and educators at education institutions. Life skills programmes have also been delivered on HIV/AIDS and resource materials, and videos and textbooks have been prepared for use in schools. The Department of Education has also embarked on the preparation of planning and monitoring tools for use by local level managers, principals and officials to monitor the effects of the pandemic and respond appropriately to the challenges faced by institutions. These tools will be aligned to other existing HIV/AIDS interventions and will be distributed to each school with training to be implemented by the end of 2004.

4.3 Acquisition of Skills – Further Education and Training (FET)
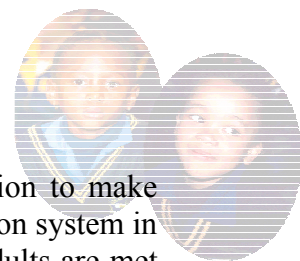
The Department of Education in South Africa has a constitutional obligation to make FET progressively available. The plans outlined below show how the education system in South Africa will "ensure that the learning needs of all young people and adults are met through equitable access to appropriate learning and life skills programmes". A new National Curriculum that has recently been launched for FET in schools, the recent observed expansion in FET activity, and the plans for implementing and transforming the FET landscape all contribute to increasing access to learning and life skills programmes which will enhance social and economic opportunities for young people and adults.

4.3.1 FET provision

The national Human Resource Development Strategy was launched in 2001 to improve human development and guide and mobilise human development initiatives in the social, labour market and employment sectors. The FET and Higher Education (HE) sectors of education are particularly implicated in the strategy. In South Africa, FET activity is spread across:

i.   Grades 10 to 12 in schools, with just over 2 million learners,
ii.   50 FET institutions (restructured from 152 Technical Colleges) with just over 350, 000 learners,
iii.   68 Colleges of Education which were not incorporated into Higher Education institutions in the recent restructuring process, and
iv.   Sector Education and Training Authorities responsible for training potential and current labour market participants.

Further Education and Training has a two-fold purpose – to prepare learners for higher education, work and personal and social development. The progressive expansion of Further Education and Training is a constitutional mandate for the Department of Education. The Further Education and Training Act, 1998, and the Education White Paper 4 on Further Education and Training, 1998, provide the basis for a nationally co-ordinated system comprising the senior secondary component of schooling and colleges which are democratically governed and funded for optimal development outcomes. Traditional technical colleges funding increased from R 591 million in 1996/97 to R887 million in 2001/02, as this represents just under 2% of the education budget, the imperative for FET institutions to be flexible enough to provide relevant offerings which are funded from outside the public sector is pressing.

4.3.2 Progress and plans for Further Education and Training provision for 2002 to 2015

FET colleges will be distinguished from schools by their flexibility and autonomy, especially in relation to providing training in scarce skills areas, different delivery modes, a diverse learner profile of young and mature adults, and their ability to draw on a variety of funding sources in addition to state funding. FET schools will be predominantly senior secondary schools with learners aged 16 to 18 years. Some FET schools will be converted into centres of excellence in Art or Music, for example.

The recently completed restructuring of FET was necessary to modernise and improve the curriculum and education outcomes at these institutions and in the complex FET system in general. FET in schools has traditionally been of public interest and the Grade 12 Senior Certificate Examination (SCE) represents a high stakes qualification which is valued in the labour market and therefore determines the future of most school graduates.

The qualification is also valued highly with Higher Education success dependent on achievement in this examination. Although pass rates in this key examination have increased in recent years and flow through rates have improved with more learners making it through to Grade 12 in the required number of years than before, challenges persist. A shift of focus towards quality in the system has resulted in the quality of passes being improved, the proportion and number of exemptions (for Higher Education admission), and attention is being paid to further reducing repetition in lower secondary grades and more vigorous local interventions in poorly performing schools.

The Senior Certificate Examination will be replaced in 2006 by the Further Education and Training Certificate (FETC) with two types of programmes: general/academic/vocational programmes offered by schools and vocationally specific programmes offered by FET institutions. The FETC assessment will have a continuous assessment component focusing on practical work and competencies gained in the classroom. The Department of Education has just released the modernised National FET Curriculum with 35 subject areas which are in line with national requirements, international trends and the interests of most learners. The curriculum will enable better articulation with Higher Education programmes with better graduate outcomes.

The Department of Education has introduced a number of initiatives for the improvement of learner performance in Mathematics and Science. One measure is the training of a cadre of student teachers at Higher Education institutions that will be highly competent in these subjects. The first cohort of 150 teachers will graduate in 2003. Practising educators have also been targeted to improve their skills in content and pedagogic aspects of Mathematics and Science while 102 schools have been targeted through the Dinaledi (Sesotho for 'Stars') project for special assistance to improve learning and resource materials and increase learner achievement in Mathematics and Science.

Challenges in the system include the effort required to mobilise the considerable investment which will be required to enable FET institutions to be flexible enough to provide programmes that are market-relevant and cost effective. The implementation of the new FET Curriculum will require a large investment and careful management and strategies are being developed to optimise the implementation of the modernised FET Curriculum.

4.3.3 Progress with Further Education and Training provision - Quality

Despite the challenges in Further Education and Training, many gains have been made in recent years. The chart below shows the effects of interventions on the number of poorly performing schools. In general, a decline in the proportion and number of poorly-performing schools is accompanied by an improvement in the pass rate.

Figure 13. Change in pass rates showing evidence of intervention in poorly - performing schools

Change in pass rates and in proportion of poorly performing schools
(in percentage points) from 2000 to 2001
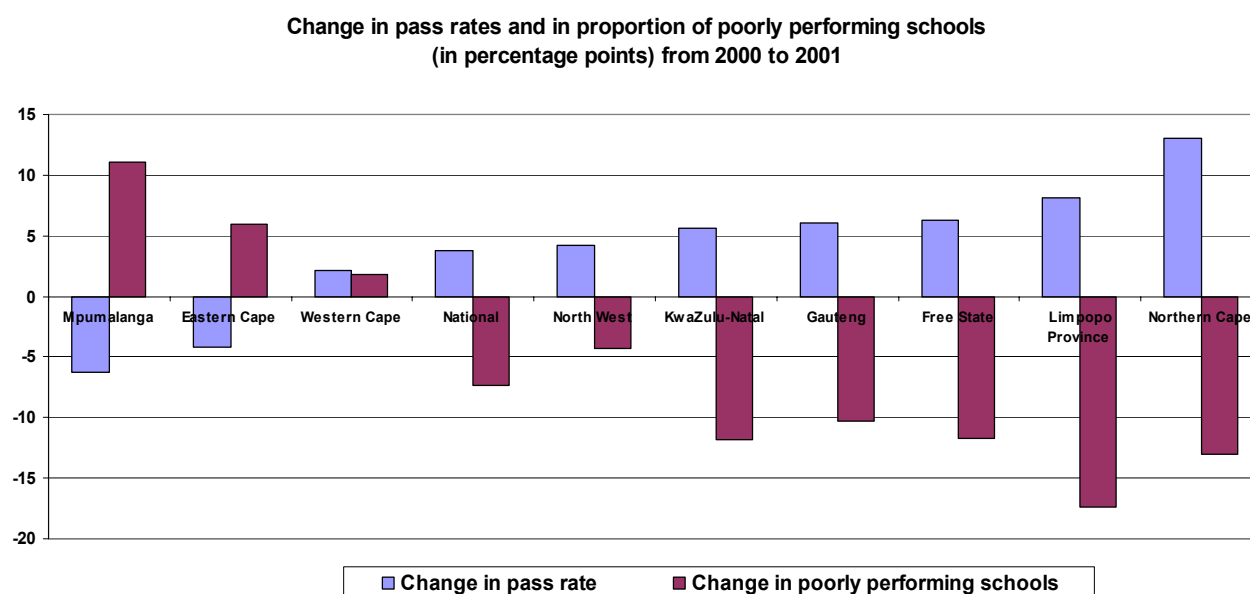
Table 12. Trends in the pass rate (%) in the Senior Certificate Examination

	1995	1996	1997	1998	1999	2000	2001
Eastern Cape	48	49.0	46.2	45.1	40.2	49.8	45.6
Free State	49.7	51.1	42.5	43.4	42.1	52.7	59.0
Gauteng	58.0	58.3	51.7	55.6	57.0	67.5	73.6
KwaZulu-Natal	69.3	61.8	53.7	50.3	50.7	57.2	62.8
Mpumalanga	38.2	47.4	46.0	52.7	48.3	53.2	46.9
Northern Cape	74.5	74.1	63.8	65.4	64.3	71.2	84.2
Limpopo Province	37.8	38.8	31.9	35.2	37.5	51.4	59.5
North West	66.3	69.6	50.0	54.6	52.1	58.3	62.5
Western Cape	82.7	80.2	76.2	79.0	78.8	80.6	82.7
South Africa	**53.4**	**54.0**	**47.4**	**49.3**	**48.9**	**57.9**	**61.7**

4.3.4 Progress with Further Education and Training provision - Access and Efficiency

In the last 6 years, there has also been an increase in the participation and proportion of appropriately-aged learners in the FET schooling system. These efficiency gains have enabled resources to be directed towards quality improvement, teacher development and resource material provision in the system, particularly for poorer learners.

Participation has also improved and recent figures show that the net participation rates for 16 to 18 year-olds in schools have improved by just under 3 percentage points since 1995 to 40.1% in 2001. Although these net enrolment rates have shown an increase overall since 1995, they have declined slightly since 1999, although not to the levels seen in the mid-1990s. The large difference between the Gross Enrolment Ratio and the Net Enrolment Ratio shows that many FET learners are outside the 16 to 18 year-old age range, which is not undesirable as the FET system serves both young and mature adults.

Reporting of FET activity is being improved and some activity is funded privately, through employer activity and through Adult Education and Training. If FET colleges are factored in, the combined Net Enrolment Ratio in 2001 is 2.5 percentage points higher and the combined Gross Enrolment Ratio is 12.5 percentage points higher than the figure for schools.

Figure 14. The rise in participation rates in FET in schools

Participation in Further Education and Training in schools has risen since 1995
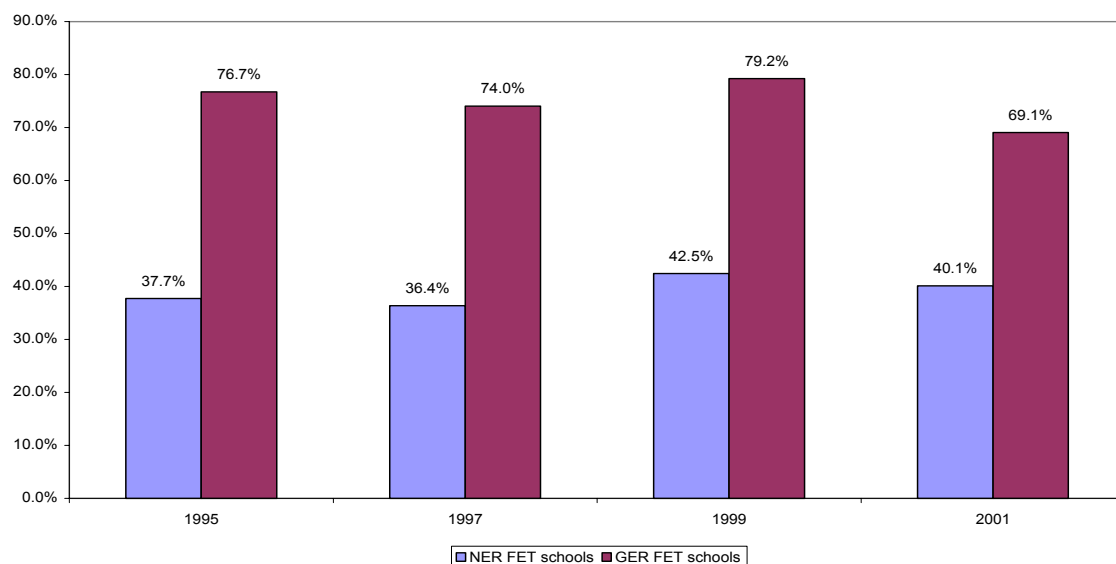
Figure 15. The contribution of FET Institutions (colleges) to participation rates

Contribution of FET Institutions to FET participation rates
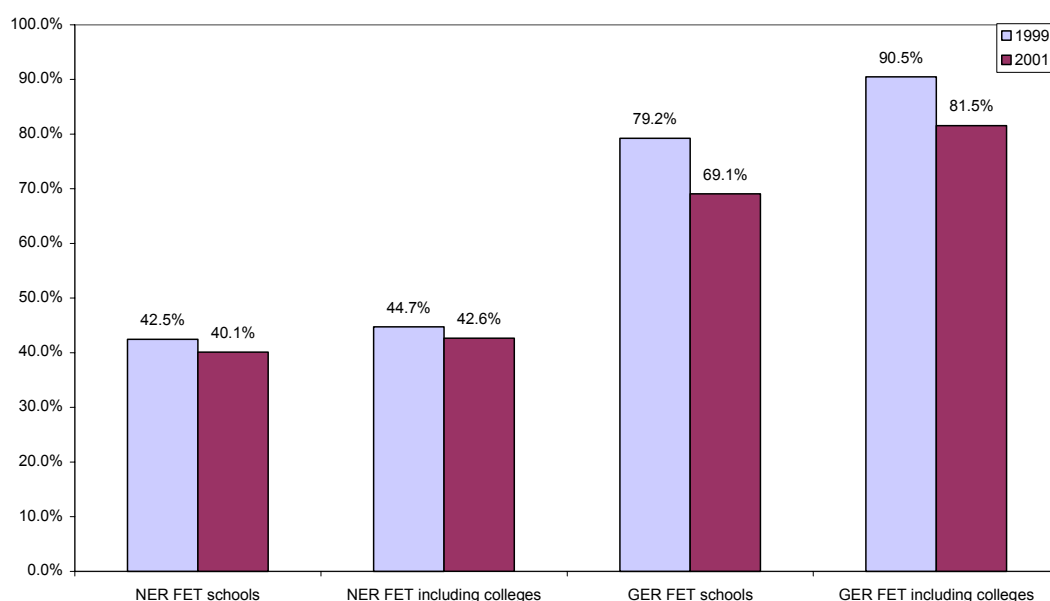
4.3.5 Challenges in FET provision

Although there has been an increase in participation in schooling and net overall participation rates in FET schools have increased in the last six years with the additional participation of just under half a million learners, further analysis and disaggregation of enrolment rate data indicates areas for future intervention.
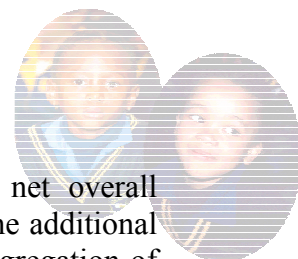
Table 13. Net Enrolment Rates (NER) for secondary level and schooling, in South Africa

	1995 Secondary NER	1999 Secondary NER	1995 Overall school NER	1999 Overall school NER
Eastern Cape	71.9%	78.5%	98.6%	100.3%
Free State	85.5%	84.1%	93.5%	92.0%
Gauteng	71.7%	86.4%	83.5%	95.7%
KwaZulu Natal	71.2%	85.4%	92.8%	98.6%
Mpumalanga	80.6%	89.3%	94.6%	99.9%
Northern Cape	66.1%	63.3%	80.9%	76.2%
Limpopo Province	78.6%	82.7%	92.2%	93.0%
North West	76.0%	79.3%	85.8%	84.3%
Western Cape	64.0%	75.2%	82.6%	90.5%
South Africa	**73.8%**	**82.3%**	**91.1%**	**95.1%**

In particular, school participation rates and secondary participation rates in the Northern Cape are the lowest in the country. According to the figures from the enrolment data records, about 4.9% or approximately 500,000 children who should have been in school in 1999 were not enrolled in schools. Again, this figure will be verified using the Census data for 2001, as some enrolment data reporting inconsistencies persist. This has significant social and economic implications for the country, but also implications for the Adult Education and Training initiatives in the affected provinces. With the recently observed decline in the number of candidates taking the senior certificate examination, the priorities in the education system are to tackle aggressively the factors influencing or causing low participation in secondary grades, high drop out rates of learners in secondary grades (at least 18% of male learners who should be in secondary grades are not enrolled compared to 9% of female learners), and the factors affecting the quality of teaching, management, performance and motivation of learners in the system before learners sit for the Grade 12 Senior Certificate Examination.

Some of these factors lie outside the control of the education and training system, but the role of the education department is to co-ordinate and enhance interventions with other partners against factors such as HIV/AIDS,

Table 14. Gross Enrolment Ratio in secondary phase, 2000

	Female	Male	Secondary
Eastern Cape	79%	66%	73%
Free State	95%	88%	91%
Gauteng	96%	89%	93%
KwaZulu Natal	91%	86%	88%
Mpumalanga	100%	90%	95%
Northern Cape	69%	64%	66%
Limpopo Province	102%	91%	97%
North West	86%	80%	83%
Western Cape	90%	78%	84%
South Africa	**91%**	**82%**	**87%**

poverty and unemployment traps in which households find themselves. These conditions are affected by the high inflation rates recently experienced in the country as a result of the large exchange rate depreciation of late 2001.

Recent pass rate increases observed in the system must be viewed in the light of service provision to the whole cohort of learners at every level in the system. The Department of Education has therefore shifted from reporting absolute pass rates, which measure the proportion of those who pass as a percentage of those who wrote the Senior Certificate Examination, to reporting on the quality of the passes and the pass ratio (the proportion of passes for the cohort which should have written the examination). This, together with the efficiency gains referred to in recent years will create the necessary pressure for quality improvement and improved accountability in the system at all levels.

Figure 16. Efficiency gains in Grades 10 to 12 (FET in schools)

Efficiency gains: Enrolment in Grade 10 to 12 at FET schools
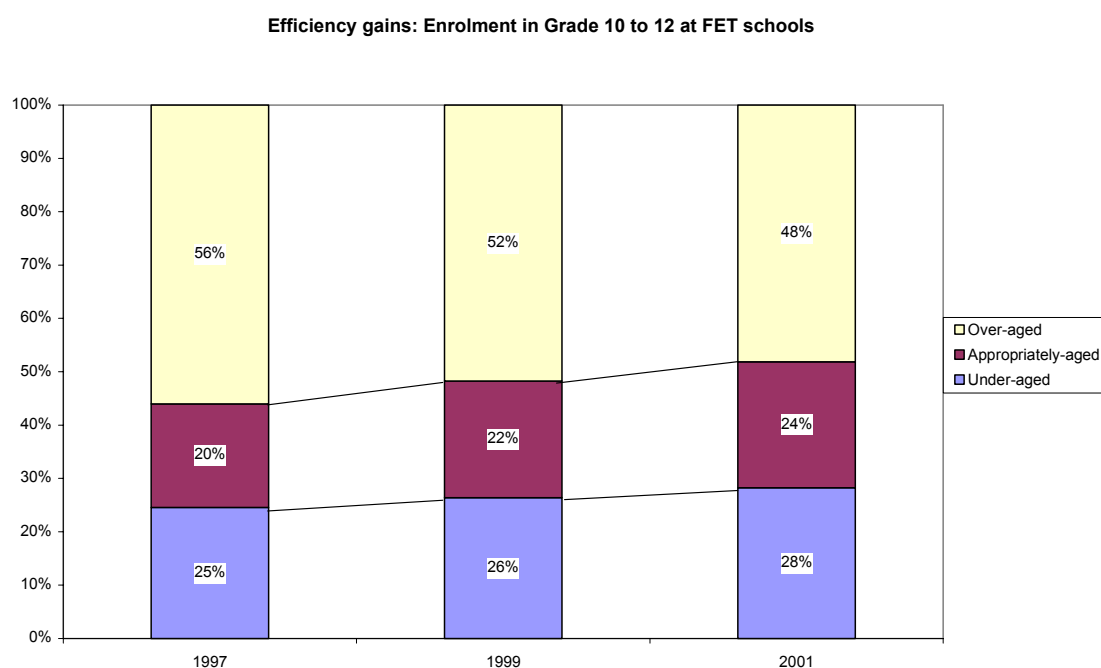
Figure 17. Historical comparisons of participation in the Grade 12 SCE

Historical comparison of Grade 12 enrolment, population, and candidates who wrote and passed the Senior Certificate Examination, South Africa
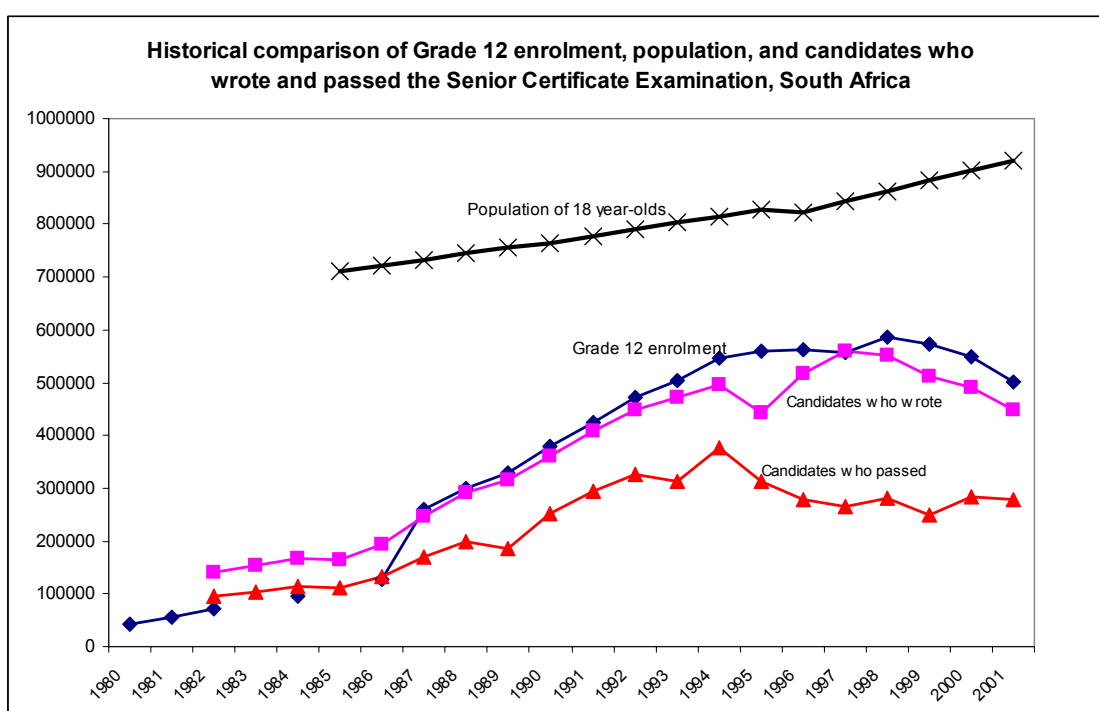
The chart above shows the absolute numbers of learners enrolled for Grade 12 and compares this with the size of the Grade 12-aged cohort in the population, as well as the number of candidates who passed and wrote the Senior certificate Examination. The distance between the line representing the population and the line representing candidates who wrote narrowed consistently until the late 1990s while the absolute number of candidates who passed remained fairly constant in the post-apartheid years after 1994. The surge in candidates who wrote the examination just after the first democratic elections in 1994 is typical of the post-independence education expansion and indications are that the system is moving through a period of consolidation and relative stability.

As a comparison of absolute numbers is not sufficient for measuring the extent of access, participation and actual education outcomes in the population, the writing and pass ratio gives an indication of the size of the cohort who passed and sat the examination, while the pass rate does not. Pass ratios (the ratio of those who passed to the number in the 18 year-old population cohort) have increased in South Africa from 15.6% in 1985 to the current levels of 30.1% nationally at an annual average increase of just under 1 percentage point. The strongest growth in the pass ratio in post-apartheid South Africa was between 1999 and 2001 and the challenge is for this growth to be sustained, along with pass rate increases, especially in the light of the recent decline observed in the number of candidates sitting for the examination (indicated by the writing ratio which declined between 1999 and 2001).

Figure 18. Historical pass rates, pass ratios and writing ratios (ratios are a comparison with the population cohort aged 18 years) for the Grade 12 Senior Certificate Examination (SCE)
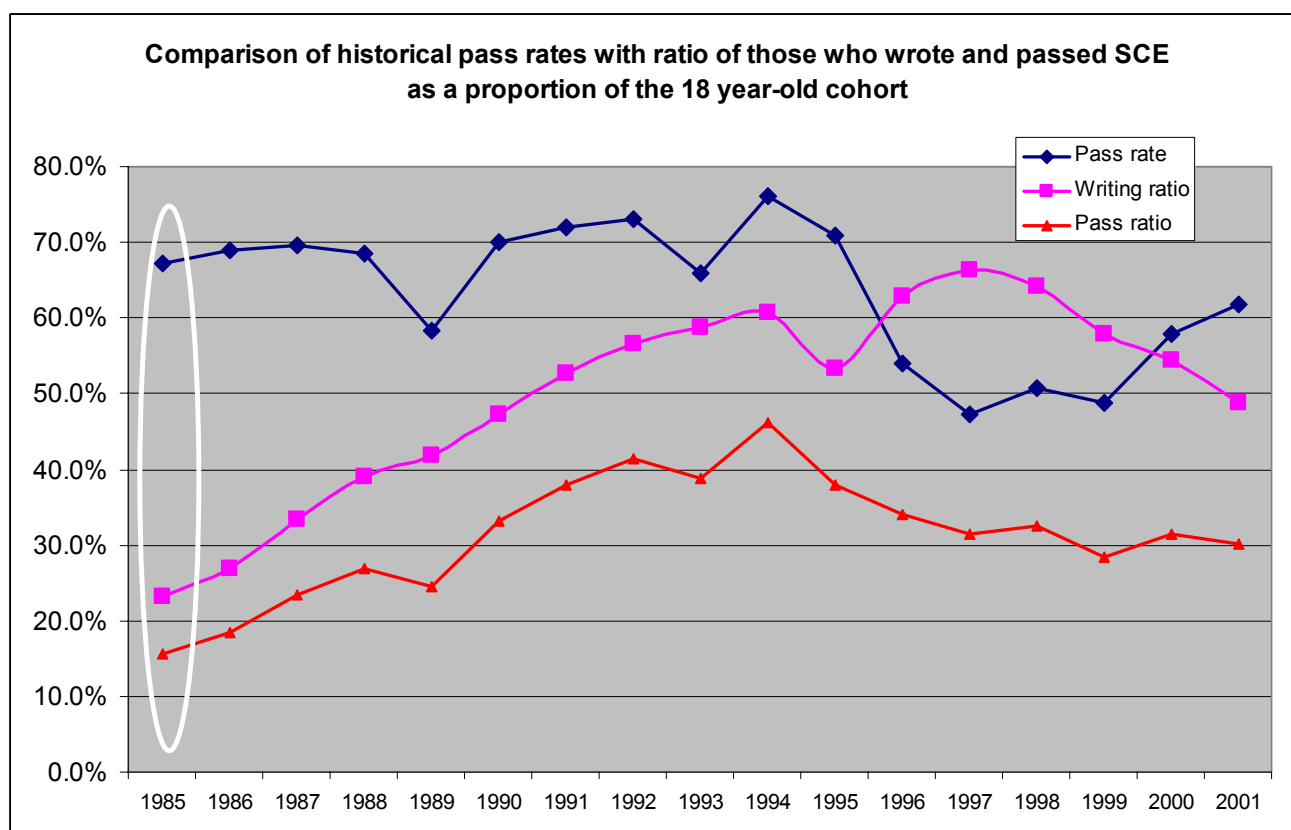
Table 15.   Average annual change in pass rate, writing ratio, pass ratio and population of cohort sitting the Grade 12 Senior Certificate Examination

	Average annual change, South Africa			
	Pass rate (percentage points)	Writing ratio (percentage points)	Pass ratio (percentage points)	Cohort (population aged 18) (percentage)
1985 to 1989	-1.8%	5.0%	2.6%	1.6%
1990 to 1994	0.6%	3.3%	2.7%	1.7%
1994 to 1999	-5.8%	0.6%	-3.1%	1.5%
1999 to 2001	6.4%	-4.6%	0.9%	2.1%
1985 to 2001	-1.0%	2.0%	0.7%	1.5%
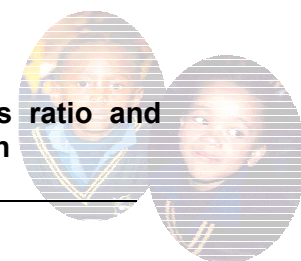
4.4 Adult Basic Education – policy and plans
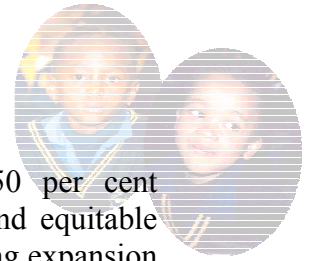
In Dakar in 2000, countries committed themselves to "achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults. The plans for achieving expansion in adult literacy are listed below along with challenges for provision. As adult education and training is an area in which there are many players in the public and private sectors, some of the challenges relate to the effective co-ordination of these sectors in achieving literacy targets.

4.4.1 Adult Education and Training provision and progress

In South Africa, adult education and training comprises:

i.   Adult Basic Education and Training (ABET which is equivalent to education activity at NQF Level 1), which is a constitutional right in South Africa,
ii.   Adult Education and Training, which may be NQF Level 2 to 4 and represents activity in the FET band of education and training in South Africa, and
iii. Literacy initiatives that enable participation in ABET NQF Level 1 activities as they increase the number of people with basic education in a society and the average number of years of education and training in the population.

For purposes of this report, Adult Basic Education and Training activity will be examined. Although the South African government has made significant increases in resources to support the reduction of illiteracy and the provision of adult education, the expansion of literacy requires an active effort by the department of education to include those who have never had formal education, as well as those who need to complete a full adult education qualification. In the provision of constitutionally mandated ABET, the Department of Education will need to ensure the achievement of NQF Level 1 qualifications by all in the population who have not completed at least 9 years of schooling, as well as the involvement in ABET of those who have had no formal schooling.

This has been a particular challenge within a context where, according to the Census in 1996, 19% of the population aged 20 years and over had no formal education or schooling. Illiteracy in South Africa had a race and gender bias as a result of the apartheid education policy and practice, to the detriment of the majority of people in the country. Through the Adult Basic Education and Training (ABET) Act, 2000, the Skills Development Act, 1998, and the Skills Development Levies Act, 1999, the Government has developed the basis for adult education and training provision which requires that government provides the necessary infrastructure that will allow adult learners to participate in lifelong learning in a non-discriminatory manner . The latter two Acts have introduced a new set of intermediate institutions consisting of labour market actors (Sector Education and Training Authorities – SETAs) and a new set of financial arrangements (skills development levy grant system) to finance training in the labour market. Central amongst its purposes is ensuring that workers and community members have access to lifelong learning.

The state has therefore prioritised the development of accredited ABET Level 4 programmes (equivalent to a basic or general education or Grade 9 qualification on the National Qualifications Framework) and significant non-public resources have been

mobilised in the delivery of these programmes in public adult learning centres, businesses, and communities. In 2000, there were just under 440,000 adult learners being taught by 18,447 educators in 2 318 public adult learning centres across the country. Many of these learners were at ABET institutions but doing programmes in the FET band.

Provincial expenditure on ABET has increased from 1998/99 to 2001/2, but illiteracy levels and unemployment levels remain high. Current spending on ABET amounts to about 2% of the education budget, which is low in comparison to other sectors, but projected spending is expected to increase from R454 million to R1 200 million by 2004. Challenges that need to be overcome in the next decade include the development of a credible funding model for ABET, better quality programmes, more opportunities for ABET graduates in the labour market, and more employer involvement and commitment to lifelong learning of employees. The ABET Curriculum is being modernised and learner programmes relevant to the needs of a modern economy have been developed in alignment with the National Qualifications Framework.

Table 16. Expenditure on ABET by province for the 1999/00 to 2002/03 financial years in R million

	1998/99	1999/00	2000/01*	2001/ 02*	Average annual change
Eastern Cape	24 010	20 101	96 772	110 780	54%
Free State	19 407	28 704	48 441	50 394	31%
Gauteng	42 795	60 756	99 671	105 613	29%
KwaZulu-Natal	14 708	20 323	37 654	32 295	27%
Mpumalanga	51 402	46 157	41 200	44 200	-6%
Northern Cape	2 191	1 838	4 677	4 919	32%
Limpopo Province	27 330	34 179	26 840	30 689	1%
North West	4 634	25 152	54 589	57 006	53%
Western Cape	13 951	14 488	17 448	18 104	10%
South Africa	200 429	251 698	427 292	454 000	28%
Annual change in price level					7%

*Values indicated still to be confirmed

Source: Department of Education, Sixth report to the President by the Minister of Education , 2002

A resourcing model for ABET is being developed to link levels of resourcing more closely with participation and desirable education outcomes for learners and for the development needs of the nation. Through the ABET Act, public adult learning centres (as ABET institutions are known) will become more relevant and democratically governed and will be able to generate additional funds (through fund raising and voluntarily determined fees) further to enhance education quality at institutions. Infrastructure investment at ABET centres, most of which are located in schools, will also receive attention, as well as teaching and learning resource materials.

Estimates of enrolment in accredited ABET Levels 1 to 4 programmes (basic education) in South Africa show growth (of just under 1.2% per year) from 155,759 in 1999 to 159,411 in 2001. This modest increase does not, however, include literacy initiatives embarked on by other education partners including employers through Sector Education and Training Agencies (SETAs) which, have been responsible for funding some 57 729 learners. Literacy units have also been established nationwide by the South African

National Literacy Initiative, which aims to recruit learners into the lower level ABET programmes from which they will proceed to achieve the ABET Level 2, 3 and 4 qualifications. In order to achieve the EFA goals of halving literacy, this growth must be sustained at least at the rate of population growth to ensure the expansion of participation and the completion of ABET programmes (not just in attendance at public adult learning centres).
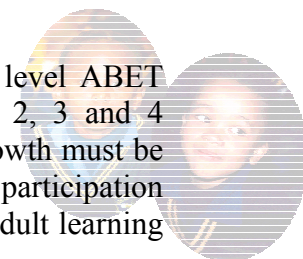
Adult literacy is by far the most urgent human development goal that South Africa has to achieve. Targeting close to 7 million adults aged 20 years or more who have not completed the seven grades of primary education, requires a drastic increase in the outcomes of all education and training activities in all sectors to improve literacy and achieve the goals for universal basic Education for All, particularly Adult Basic Education and Training.

4.4.2 Plans for Adult Education and Training provision including ABET for 2002 to 2015

The 2001 National Census will in 2003 provide a basis for assessing the impact that literacy and adult basic education and training initiatives have had on the population in the last five years. Comprehensive plans are in place to reach learners and improve participation in Adult Basic Education and Training to consolidate the gains made in funding and in participation in a systematic way. These interventions are listed below.

The reach of ABET programmes will be expanded and more agreements will be signed with School Governing Bodies to use their facilities for adult education and training programmes. This will maximise the reach of ABET programmes with minimal initial capital investment.

The skills development aspect of adult education and training will be elaborated with more attention to entrepreneurial and agricultural programmes which will assist in self-employment and labour market participation of graduates, particularly female graduates.

As of 2002, 61% (or 5 600 000 people) of the work force has NQF Level 1 or equivalent and the 2015 goal is for 80% of the work force to have this qualification through expansion of access to ABET programmes. Already, several ABET learnerships and unit standards have been registered in the areas of Natural Sciences, Economic and Management Sciences, Arts and Culture, Language, Literacy and Communication, Mathematical Literacy, Human and Social Sciences, Life Orientation, Applied Agriculture and Agricultural Technology, Travel and Tourism, Environmental Management, Food and Beverages, and Health Care.

The relatively large school population gives rise to real resource pressures within the education sector and on adult education and training in general. Education and training partners, including employers, will necessarily need to redouble their efforts to improve quality and expand access to at least the 4.5 million more people nationwide who are not functionally literate or who have not participated in Grade 6 by 2015.

The EFA goal of halving the illiteracy rate means an average increase in the number of people aged 15 and over who are functionally literate by just under 470,000 annually from 1996 in order to halve the illiteracy rate. This is equivalent to increasing the national functional literacy rate to 83% by 2015 for people aged over 15 years old, from 1996 values of 67%, and increasing the functional literacy rate of 15 to 24 year-olds from 1996

levels of 83% to 92% by 2015. This assumes a modest population growth of 1.44% (as observed in the respective cohorts in recent years) but a more vigorous growth (of about 2.5%) in the number of literate people aged 15 or over. By 2015, then, of the estimated population of 53 million people, 34 million will be aged 15 years and over and 28 million of these over-15-year-olds will need to be functionally literate if the EFA goal is to be achieved.
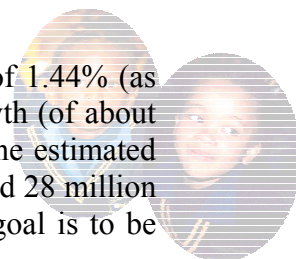
South Africa is on track to achieve the literacy target as long as the number of learners graduating from Grade 9 (particularly when the General Education and Training certificate is implemented) remains at levels above the 470,000 mark per year. However, as well as being committed to improving literacy rates, the Department of Education is committed to expanding lifelong learning adult education and training opportunities, particularly in partnership with SETAs, non-governmental and private organisations. This will enable the EFA targets to be achieved before 2015 for adult basic education as well as adult education and training.

Currently, information on Adult Education and Training activity is provided by the Department of Education and Labour, but the national Census also provides the means to verify education levels in the general population. The challenge will be to enable and enhance the reporting of education levels by ABET levels (within NQF level 1) in the general population.

4.4.3   Plans for Adult Education and Training Provision (including ABET) by 2005

Literacy: A recruitment and training drive for learners and volunteer educators will be completed by 2005 with the target enrolment of 68 000 learners in 4 500 literacy units nationwide by 2005. Language-relevant materials will be developed and applied in all curriculum areas and used in the Literacy units and a management system for literacy programme delivery should be developed by 2005 to ensure sustained quality of delivery, freely available resource material, and appropriate learner assessment and educator support material.

Adult Basic Education and Training Provision (ABET): The retention rates of ABET learners in the education system is notoriously problematic and a social mobilisation campaign will be implemented to encourage participation and completion of ABET programmes. A development programme for ABET practitioners will be finalised and translated into accredited training programmes and an audit of development needs of ABET officials will be completed to inform the development of accredited training programmes for officials. By 2005, a system for assessing and monitoring the functionality of Public Adult Learning Centres will be established, as well as a system for development, provision, procurement and retrieval of Adult Learning and Teaching Support Materials. As availability of reading materials seriously hampers the sustainability of education programmes, the Department of Education has identified an improvement of access to basic materials and media resources as a target with all Public Adult Learning Centres fully equipped for ABET provision by 2005.

Adult Education and Training: By 2005, 30,000 learners in key development nodes should have been enrolled in Agriculture and Small, Micro and Medium Enterprise programmes. This figure will increase after 2005 in other development nodes.

Table 17. Statistics on adult literacy and adult education levels in South Africa.

	1991	1996
Number of adults aged over 20 years with no formal schooling	4 529 354	4 066 187
% of adults aged over 20 years	26.5%	18.4%
% of total population	14.6%	10.0%
Number of adults aged over 20 years	17 106 335	22 146 220
Number of adults aged over 15 years		26 337 143
Number of adults aged over 15 years who have attained a Grade 6 or higher level of education		17 550 913
Functional literacy rate of adults aged over 15 years		6.6%
Total population	30 986 920	40 583 573

4.5 Gender disparities and gender equality

The Dakar Framework for Action requires the elimination of gender disparities by 2005, implying that participation rates should be equalised by this time, and that gender equality and equality of opportunity should be achieved by 2015. As many females participate in literacy programmes as men, in proportion to the numbers in the population so gender parity has been achieved. The forthcoming 2001 Census results will provide data on trends since 1996. In addition, as many girls as boys participate in schooling overall, although there are gender disparities at primary level (with more boys than girls enrolled). These, however, are reversed in the secondary level of education (with more girls than boys enrolled). These dynamics and particularly the phenomenon and reasons for dropping out are being investigated so that appropriate strategies may be designed for reducing these enrolment patterns, especially at local level. In addition, measures have been instituted to monitor attendance at school level so that the functional units responsible may be alerted about vulnerable learners who may be prone to dropping out of the system.

4.5.1 Progress with gender parity - Access

Near universal enrolment rates characterised the South African schooling system in 2002 with Gross Enrolment Rates (GER) of 99% in primary grades (of seven years duration), 87% in secondary grades (of five years duration) and overall participation in schooling (of twelve years duration) averaging about 94% nationally.

Table 18. Enrolment rates by phase

	Primary GER 2000	Schooling GER 2000	Secondary GER 2000	Primary GPI 2000	Secondary GPI 2000	Total GPI 2000
Eastern Cape	100%	73%	94%	1.00	1.20	1.05
Free State	95%	91%	94%	0.96	1.08	1.00
Gauteng	100%	93%	93%	0.97	1.08	1.01
KwaZulu Natal	100%	88%	96%	0.96	1.06	0.99
Mpumalanga	101%	95%	99%	0.94	1.11	1.00
Northern Cape	86%	66%	78%	0.99	1.07	1.02
Limpopo Province	93%	97%	94%	0.95	1.12	1.01
North West	94%	83%	90%	0.96	1.08	1.00
Western Cape	96%	84%	91%	0.99	1.15	1.04
South Africa	99%	87%	**94%**	**0.97**	**1.11**	**1.01**

Disaggregating these ratios by gender yields areas for attention. Primary enrolment rates for female learners are 3% less than that for male learners with the largest deviation of enrolment rates by gender being observed in Limpopo, KwaZulu-Natal and Mpumalanga, and Free State provinces.
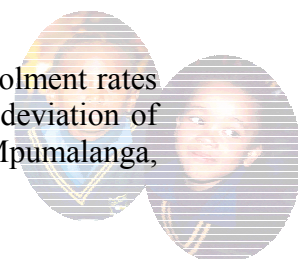
Table 19. Enrolment rates by phase and gender.

	GER Male 1997	GER Female 1997	GER Male 2000	GER Female 2000	Primary GPI 1997	Primary GPI 2000
Eastern Cape	100%	100%	106%	106%	1.00	1.00
Free State	99%	94%	97%	93%	0.95	0.96
Gauteng	87%	82%	101%	98%	0.95	0.97
KwaZulu Natal	100%	100%	102%	98%	1.00	0.96
Mpumalanga	98%	92%	104%	98%	0.93	0.94
Northern Cape	78%	76%	86%	85%	0.97	0.99
Limpopo	92%	84%	95%	90%	0.92	0.95
North West	91%	86%	96%	92%	0.94	0.96
Western Cape	86%	82%	96%	95%	0.96	0.99
South Africa	**98%**	**86%**	**100%**	**97%**	**0.88**	**0.97**

The Gender Parity Index (GPI) is the ratio of GER female to GER male. If it is greater than 1, it indicates evidence of more females than males enrolled relative to the appropriately-aged school population. GPI values show evidence of male learner enrolment being smaller than female enrolment in secondary grades while the reverse is true in primary grades. These observed enrolment patterns are challenges in rural areas of the country, as girls in primary grades may drop out to care and support household members while boys are more prone to opt for employment and do not complete their secondary level studies in the appropriate time.

4.5.2 Progress with gender parity in literacy participation.

According to 1996 national Census data, gender parity in literacy has also been achieved with equal proportions of female and male functionally literate persons (achieving Grade 6 or higher) in the population.

Table 20. Literacy gender parity index for South Africa.

	Literacy Gender Parity Index 15 + year-olds	Literacy Gender Parity Index 15 to 24 year- olds
Eastern Cape	1.0	1.1
Free State	1.0	1.1
Gauteng	1.0	1.0
KwaZulu Natal	1.0	1.0
Mpumalanga	0.9	0.9
Northern Cape	0.9	1.0
Limpopo	1.0	1.0
North West	0.9	1.0
Western Cape	1.0	1.1
South Africa	**1.0**	**1.0**

Source: Education for All. The South African Assessment Report, 2000

However, further investigation shows patterns deeply skewed by race within different education level groupings in the population. These patterns show where interventions must be directed for maximum effect and equity.
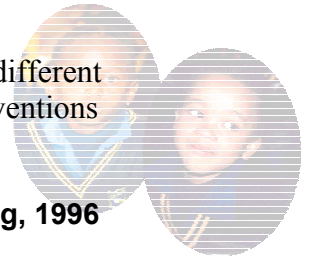
Figure 19. Population and gender distribution of those with no schooling, 1996
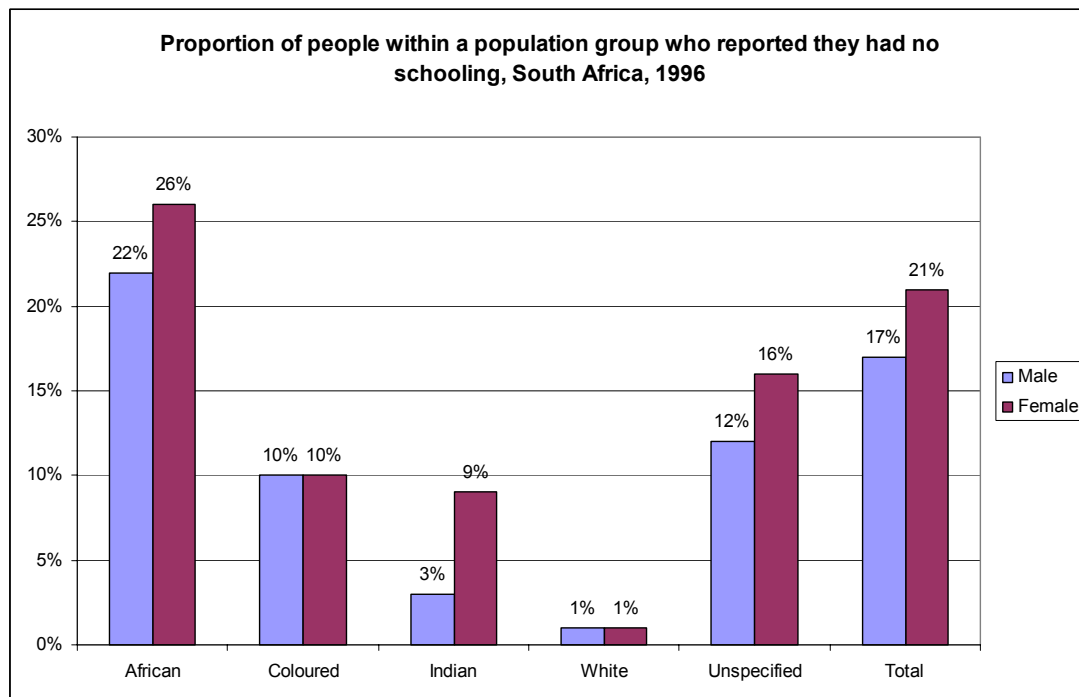
Source: Statistics South Africa, 1996 Census results, the people of South Africa

Figure 20. Grade 3 systematic assessment results in 2001
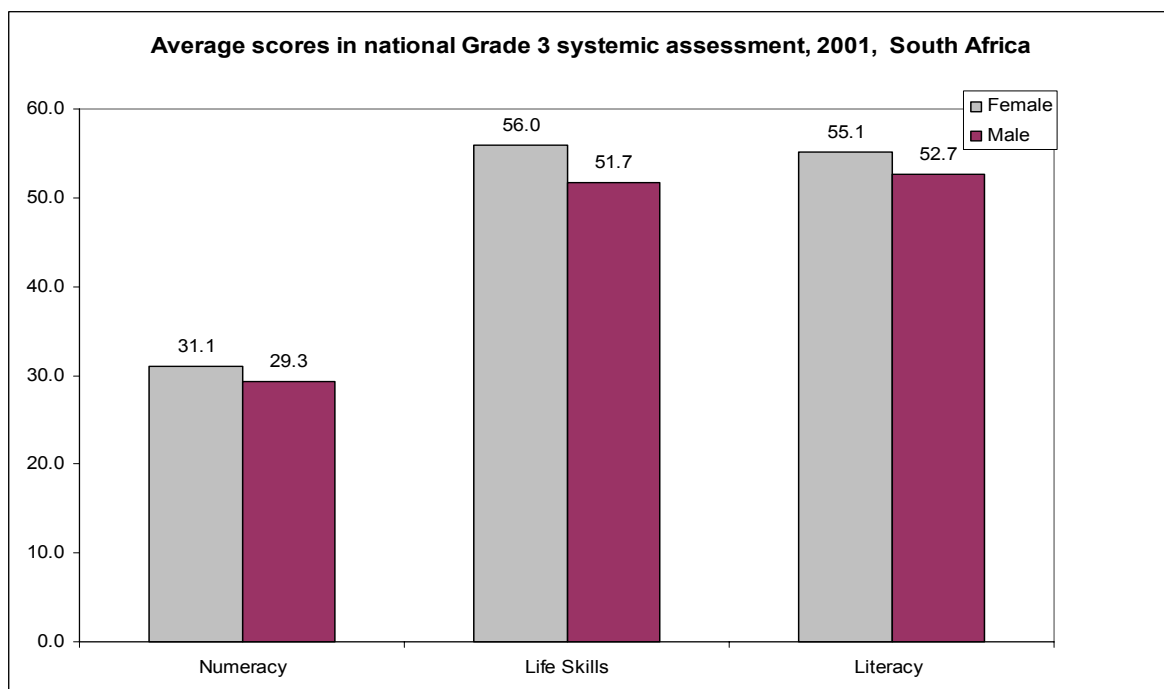
4.5.3 Progress with gender parity in education quality and performance.

In spite of the tremendous barriers that female learners face in participating in education, it is clear that the various initiatives to improve their performance and achievement levels are beginning to pay off. Girls are doing better at key competency tests. In the Grade 3 Systemic Assessment exercise carried out by the Department of Education in 2001, average scores for female learners were also higher than those for male learners.

This pattern is also observed in the Grade 12 Senior Certificate Examination if the quality of passes is examined. The percentage of female learners who passed with merit (average score of between 60% and 79%) and with distinction (an average of over 80%) was larger than the percentage of male learners in almost all provinces.

Table 21. Percentage of learners by type of Senior Certificate Examination pass

	Pass with merit		Pass with distinction	
	Male	Female	Male	Female
Eastern Cape	7.2	8.4	1.1	1.5
Free State	10.3	13.5	1.5	2.9
Gauteng	14.7	18	3.4	4.6
KwaZulu Natal	10.9	13.5	2.1	2.7
Mpumalanga	7.9	9.4	1	1.4
Northern Cape	11.9	16.4	2.5	2.4
Limpopo Province	5.1	3.9	0.3	0.4
North West	7.8	8.8	0.8	1.2
Western Cape	17.2	21.1	4.5	5.5
South Africa	10.3	12.4	1.9	2.6

In addition, it seems that the proportion of female learners who pass the Senior Certificate Examination at Grade 12 as a proportion of the female cohort (or the pass ratio for female learners) is larger than the pass ratio for male learners.

This means as a whole, that the pass efficiency in the cohort of female learners is slightly higher than that of male learners. This is in spite of the fact that more female learners (247 159) sat the exam in 2001 than male learners (202 212), and the fact that the pass rate of female learners (60.1%) was lower than that of male learners (63.6%). As stated before, the pass rate does not take account of the size of the cohort which write, whereas the pass ratio does. This means that a larger proportion of females of the appropriate school graduating age leave the education system annually.

Pass ratios for female and male learners for Grade 12 Senior Certificate Examinations
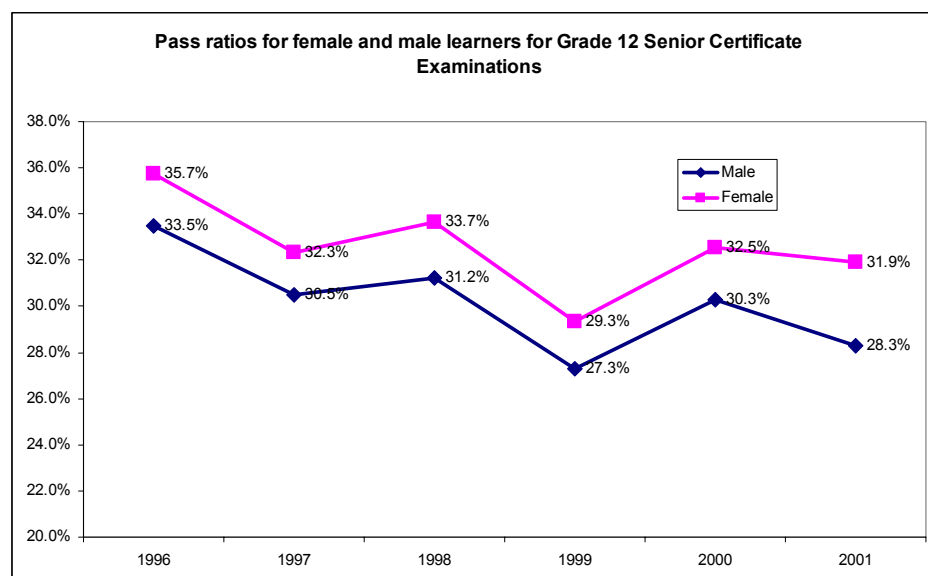
Figure 21. Pass ratios by gender in the Grade 12 Senior certificate Examination

4.5.3   Plans for Gender Parity in education provision for 2002 to 2015.

Several strategies have been developed to include the participation of girl children. School safety interventions have been made with efforts put into fencing schools and making them secure. An innovative manual has been developed in collaboration with the South African Police Service to make schools healthy, safe and inclusive, particularly for female learners.

Infrastructure backlogs relating to water and sanitation have been prioritised as these affect participation by girls. Discrimination against pregnant learners has been made policy so that barriers (i.e. in attendance and achievement) faced by girls can be reduced. Despite the heartening results in the education system, there are traces of poverty, which threaten education outcomes for female learners. The challenge is to ensure the inclusion of all female children in quality schooling and the removal of all barriers especially those related to private costs associated with learners, and particularly poor female learners getting a good quality basic (general) education.

Secondary level participation is a problem that is receiving attention and the high drop-out rates of boys in secondary grades (most probably for employment reasons) is a problem and has an impact on their ultimate education outcomes, literacy levels and sustained participation in social and economic activities.

4.6 Quality for all

The Department of Education in South Africa is committed to "improving all aspects of the quality of education and ensuring excellence of all so that recognised and measurable learning outcomes are achieved by all, especially in numeracy, literacy and life skills". Several quality improvement strategies have been outlined in previous sections. The following section deals with key systemic policies, interventions, and strategies identified as a pre-condition for quality improvement in education. Many of these interventions were made under the banner of the *Tirisano* programme which was launched in 1999 to nurture a high quality education system which was accountable, transparent, effective and efficient. Many of these interventions have long-term implications and they will necessarily be implemented using a phased approach.
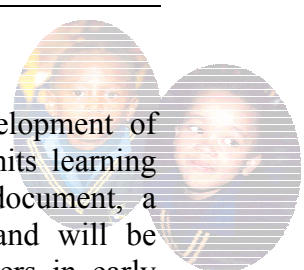
4.6.1 Plans for improving quality in education provision for 2002 to 2015.

Implementing Curriculum reform: The revised National Curriculum is at the heart of education transformation and it is designed to produce independent critical thinkers, who can solve problems and make meaningful contribution to our society. An outcomes based approach, known as Curriculum 2005, spells out the general and specific outcomes envisaged for every learning area and grade. The dates for the implementation of this curriculum are from 2004 to 2008 in the General Education and Training band. This foundation will assist in providing a foundation for learners to participate in the Further Education and Training band. The revised Curriculum 2005 and the new Further Education and Training Curriculum are intended to provide a basis for lifelong learning and sustainable development. The emphasis in the curriculum is on the acquisition and development of knowledge, skills, values and attitudes.

Mitigating the impact of HIV/AIDS: Currently, the only effective vaccine that can combat HIV/AIDS is education. Whilst the importance of specific interventions in education focussing on HIV/AIDS cannot be over-emphasised, it should also be realised that if the education system as a whole functions well, the risks of HIV/AIDS to society are reduced. In particular the education of girls has been shown to play a major role in mitigating the impact of HIV/AIDS. HIV/AIDS in combination with a number of other factors, is expected to result in major teacher supply shortages in the coming years if appropriate action is not taken now. Experience in South Africa has shown how complex the issue of managing teacher supply, and even demand, is for government. Decisions made now will have ripple effects that will be felt for several decades. This is a key challenge for the education authorities and for government as a whole.

As a first step, the National Policy on HIV/AIDS, for Learners and Educators in Public Schools, and Students and Educators in Further Education and Training (National Education Policy Act) was released in 2000 to enable learners and educators to deal better with affected and infected colleagues and peers and reduce the spread of HIV/AIDS. In addition, the revised National Curriculum contains a strong life orientation component, which will influence educator and learner behaviour through increased knowledge and awareness. Master trainers, resource materials and manuals have been produced to guide teaching and learning in life orientation. A national programme of action has been developed as a result of a national conference on HIV/AIDS and the education sector held in May 2002, which was attended by key local, national and international education partners. The programme of action will form the basis for prioritising interventions in the education sector in the medium to long term.

Alleviating poverty: Poverty and malnutrition together threaten the development of children in sub-Saharan Africa, reduces participation in education and limits learning attainment when children go to school. As mentioned earlier in this document, a comprehensive Integrated Nutrition Programme has been implemented and will be expanded in future to some secondary learners as well as all poor learners in early childhood development and primary programmes. The introduction of a redress pool of about 5% of educators to be allocated to schools with the poorest learners enables teacher quality to be targeted to needy learners in our system. As well as this, considerable technical capacity has been developed to ensure that funding follows the poorest learners in the schooling system. The Department of Education is currently developing strategies to reduce the burden borne by poor parents related to the high cost of uniforms, quality textbooks and supplementary resource materials. Currently, orphans living at institutions qualify for an automatic exemption from any fees a school may decide to charge.

In addition, the national Integrated Sustainable Rural Development and Urban Renewal strategies enable interventions to be made across sectors in development nodes, to increase the quality of social services provided to needy communities in these nodes.
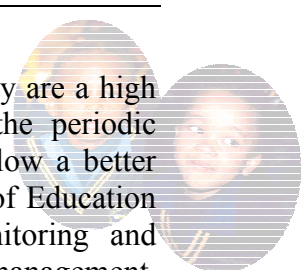
Making inclusive education work: The 2001 Education White Paper 6 on Special Needs Education describes the intent of the Department of Education to implement inclusive education in all education institutions including schools, further education and training institutions and higher education institutions. The policy provides for mainstreaming provision of education for vulnerable learners within education institutions, and provides for inclusion of out-of-school youth, the development of local district support and specialised support teams to provide support and assistance to learners who require it.

Vulnerable learners include those traditionally marginalised including disabled learners and those 280, 000 who are out-of-school, those severely disadvantaged by poverty, second language teaching as well as those affected by HIV/AIDS. The White Paper proposes that the inclusive education and training system should be built over 20 years with a initial short-term research and monitoring exercise concluded in 2003 followed by an organised transition in the medium term (2004 – 2008) and long term. What remains to be quantified are the targets for this inclusive education expansion, particularly in the schooling system.

Dedicated mathematics and science schools: The areas of mathematics, science and technology have been identified as scarce skills, which are key development drivers for the country. In response, 102 schools have been identified and systematically resourced as centres of excellence in teaching these key subjects and plans are underway to develop centres of excellence in Arts and Sports. 306 Mathematics and Science teachers have been targeted for development in the medium term. In addition, over 1000 Maths, science and technology teachers are undergoing an upgrading and in-service training programme (lasting two years) which will be expanded to cover more teachers from 2002 onwards.

Technology in education: Information and Communication Technologies (ICT) have been applied in several schools and education institutions. Several projects which involve public-private interactions have expanded ICT provision in schools and ICT skills competence in education institutions and communities.

Improved monitoring and evaluation: Monitoring and evaluation of quality are a high priority and the Whole School Evaluation framework, combined with the periodic Systemic Evaluation at Grades 3, 6 and 9 of the schooling system will allow a better indication of how learner achievement changes with time. The Department of Education has also identified the development of management systems for monitoring and ultimately enhancing key aspects of education including financial management, curriculum, Learner Support Materials, learner progression, institutional functionality, infrastructure, and educator development. Monitoring and benchmarking of learner assessment is common practice and sustained analysis of learner performance, trends in service delivery, system resourcing and policy compliance will be required to feed back to and inform education provision.

Improved organisational effectiveness will be consolidated through a variety of inter-governmental forums including the Heads of Education Departments Committee (HEDCOM) and the Council of Education Ministers (CEM) who investigate, consult, deliberate (and in the case of CEM, advise the Minister of Education) on matters of importance to the education system as a whole. Monitoring and evaluation of provincial processes such as school readiness, expenditure on key items, and expenditure trends will also assist in refining education provision and policy implementation. Management and administrative support where required has also been facilitated by the national Department of Education on the basis of need. This role of the National Department in facilitating implementation in addition to policy making will continue to be refined and consolidated in future. Dialogue with the national Treasury will continue, as will the dialogue with development agencies around issues of priority to education.

Enhanced values and history in education: In 2001, the Minister of Education released a M*anifesto on Values, Education and Democracy* which highlights the values to be promoted through education and in classrooms. The values identified are democracy, social justice and equity, equality, non-racism, non-sexism, human dignity, respect, reconciliation and the rule of law. In the same year, the Minister also launched the South African History Project to enhance the status of history in the curriculum, in the classroom and in education in general. Incidents of discrimination against learners, such as racial incidents or exclusion from schooling, will be regularly and objectively monitored and strategies will be implemented to reduce these incidents.

Improved literacy and Adult Basic Education and Training interventions: Literacy interventions will be expanded using a volunteer corps for facilitating and teaching literacy programmes, although social mobilisation is necessary to sustain such programmes. In the medium term, improving curriculum support, teaching and learning resource material provision, and enhanced partnerships with Civil Society and Non-Governmental Organisations will assist in improving literacy levels in the country. Adult Basic Education and Training interventions are listed in Section 4.4 and include extensive programme development, curriculum support and partnership in delivery, especially with employer organisations and agencies.

Improved teacher development programmes: The application and implementation of the Norms and Standards for Educators will be strengthened as they spell out the main roles of educators. In-service training of under-qualified practising educators will continue with their participation in the National Professional Diploma in Education. Learnership programmes for under-qualified educators will be strengthened in collaboration with SETAs and the Education Labour Relations Council and Higher

Education institutions which run teacher development programmes in an effort to improve completion rates and quality in the teaching service.

Improved school effectiveness with education institutions which are community resources: In order to improve and support curriculum implementation, teacher upgrading, school leadership, management and governance support initiatives will continue, especially as School Governing Bodies are elected every three years. Rural and farm schools have been targeted for special assistance and teachers in these schools will continue to receive support in areas such as multi-grade teaching. Targeted initiatives to reduce abuse, particularly drug abuse and sexual abuse by both learners and educators, will be developed and school safety interventions will be expanded and monitored as a matter of priority. Advocacy campaigns directed at School Governing Bodies will increase awareness of the important values embodied in the Constitution. In addition, the number of schools whose governing bodies have been allocated responsibility for key financial management functions, such as managing the school's spending and buying equipment and books, has increased by over 100% from 2 816 in 2001 to 5 682 in 2002 according to a recent provincial financial survey. This number is set to increase so that community participation in governance will expand in schools.

Table 22. Number and percentage of schools with financial management functions allocated to the School Governing Body (Section 21 schools)

	2001	2002	% Section 21 schools in 2002
Eastern Cape	170	170	2.6%
Free State	185	382	15.9%
Gauteng		1 576	45.4%
KwaZulu Natal	621	702	12.5%
Limpopo Province	640	945	22.6%
Mpumalanga	173	173	9.3%
North West		623	27.6%
Northern Cape	460	451	97.8%
Western Cape	567	660	45.1%
South Africa	**2 816**	**5 682**	**20.2%**

5   Data collection, analysis, information and projections
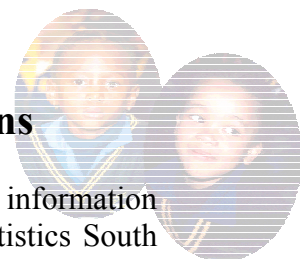
Monitoring and evaluation of EFA and education goals is carried out using information collected within the education system itself, information and data from Statistics South Africa mainly and supplementary data and information from other research and statistical agencies. The data and information in this status report have been analysed in relation to EFA goals and adapted from the EFA indicators for use in the South African context. Where sourced from outside the education system or the national statistical agency, the source is acknowledged.

An Education Management Information System (EMIS) has been developed to provide the information infrastructure required for the information needs of planners and managers in the system as well as for international monitoring requirements. Information from other management systems (such as examinations, financial and personnel databases) as well as sample surveys (such as the national Grade 3 Systemic Assessment exercise for assessing learner performance and quality assurance) are also used to supplement information in the EMIS for monitoring and evaluation purposes as well as for education planning and decision support. Progress has been made in extending the scope of the EMIS to cover Adult Basic Education and Training, Further Education and Training, Higher Education as well as General Education and Training activity.

Challenges in the education system which will need to be addressed in the short to medium term include:

  i. The lack of adequate measures of external efficiency of education: This efficiency would be measured in terms of the social and economic contribution of education graduates in society. In addition, tracking learner experience and performance through the system and out into the world of work or further and higher education is planned and a database will be developed in the long term to enable learner tracking to be done.
 ii. The need for a consistent assessment of the future demand for education: This is something that the Department of Education is working on and which will be completed in the 2003/4 financial year.
iii. Measures for auditing, validation and quality assurance of data collections within the system need to be developed. Plans have been developed to work on a quality assurance mechanism for data collected in the EMIS. In addition, an education information policy has been developed to standardise certain aspects of education information to improve the credibility of reported information.
 iv. Collaboration with the national statistical agency to monitor (and validate education and other government data sets) through special and sample surveys of the following in the general population: private and public education and training activity, access of learners to nutrition programmes at school, fees paid and fee exemptions granted, learner repetition and drop out history, incidents of discrimination, and incidents and reasons for exclusion in the general population. The extent of unreported activity may be checked against activity in such surveys of the general population as there is potential for reduced bias and more representative results.
  v. Measures on the influence of private and public resourcing on learner performance, outcomes and experience.

6 EFA financing, resourcing and fund mobilisation

The resourcing landscape in South Africa is informed by the constitutional obligation to provide equitable education provision of high quality. Bearing the effects of apartheid education, this can only be done within a redistributive framework. Resourcing, whether public, private or international is therefore aligned to the priorities in the education system. As the school system constitutes over 80% of the learner population and therefore the education budget, this puts non-school programmes under pressure. Efforts have been made to generate budget support both locally and internationally as outlined below. It is expected that education budgets will continue to increase by about 6% in annually, and enrolment will decrease slightly as fertility rates decline, so that the combination of the state education budget with budget support will enable the achievement of Education for All with quality.

6.1 Public resourcing of education

Public resourcing is done within a three year Medium Term Expenditure Framework and all planning and priority settings are done on a three-year rolling basis. This means that programmes are costed for this period, so that planning and spending is more predictable. Outside the three-year cycle, education budgets for 2006 onwards are expected to increase by 6% per annum according to current estimates. Many of the long term implications of plans outlined above will occur in the post-2006 financial years. Already, curriculum implementation, expansion of Adult Basic Education and Training, expansion of Early Childhood Development, Inclusive Education and Education for Learners with Special Needs, the restructuring of Further Education and Training and Higher Education institutions have been submitted to the national Treasury as priorities for resourcing in the medium to long term.

As provinces receive their gross allocations based on an Equitable Shares Formula (which takes infrastructure backlogs and size of school-going-age population into account), they then allocate absolute amounts to different sectors including education. These amounts are then distributed in a poverty targeted fashion to schools, and according to other education sub-sector priorities. The challenge is to entrench EFA within the allocation and budgetary processes within provinces so that education outcomes can be achieved.

6.1.1 Education expenditure as a component of GDP/ national expenditure [9]

In 2001/02, education expenditure accounted for 5.5 per cent of GDP. Total education expenditure has increased since 1998 and is projected to increase at a rate of just less than 7 % in the medium term. The share of education expenditures as a proportion of Gross Domestic Product is projected to decline as the growth of GDP is projected to be larger than the growth in government education expenditure as shown in the table below.

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[9] Republic of South Africa, National Treasury, Intergovernmental Fiscal Review, 2002

Table 23. Provincial education expenditure as percentage of GDP/ national expenditure in R million.

	Actual			Estimated actual	Medium-term estimate		
	1998/99	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05
GDP	753 829	821 144	910 500	990 000	1 082 800	1 178 900	1 277 500
Consolidated non-interest expenditure	168 544	178 296	197 227	224 426	255 651	276 228	297 664
National sphere	72 220	78 554	87 014	102 027	117 462	128 661	140 568
Provincial sphere	96 324	99 742	110 213	122 399	138 189	147 567	157 096
Education (National and Provincial)	45 167	46 748	50 562	54 723	59 328	63 374	66 941
Provincial Education expenditure	38 723	39 828	43 235	46 903	50 943	54 470	57 638
Public ordinary school education	30 623	33 688	36 828	39 343	41 985	45 274	47 655
Total national and provincial education expenditure as % of GDP	6.0%	5.7%	5.6%	5.5%	5.5%	5.4%	5.2%
Provincial education as % of GDP	5.1%	4.9%	4.7%	4.7%	4.7%	4.6%	4.5%
Public ordinary school education as % of GDP	4.1%	4.1%	4.0%	4.0%	3.9%	3.8%	3.7%
Provincial education as % of consolidated non-interest expenditure	23.0%	22.3%	21.9%	20.9%	19.9%	19.7%	19.4%

Source: National Treasury, Intergovernmental Fiscal Review 2002

6.1.2 Expenditure by programme including schooling

For 2001/02, R39 billion was spent on Public Ordinary School Education, which was 3.97 per cent of GDP. Public Ordinary School Education comprises 83.8 per cent of provincial education expenditure and 30.7 per cent of all provincial expenditure. This expenditure programme funds primary and secondary ordinary schools, that provide compulsory education to grades 1 to 9, and non-compulsory education for Grades 10 to 12.

Table 24. Expenditure on provincial education programmes in R million.

	Actual			Estimated actual	Medium-term estimate		
R million	1998/99	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05
Administration	4 373	2 303	2 268	2 873	3 072	3 135	3 287
Public Ordinary School Education	30 623	33 688	36 828	39 343	41 985	45 274	47 655
Independent School Subsidies	245	199	206	187	359	369	382
Special School Education	1 054	1 064	1 135	1 363	1 583	1 481	1 554
Teacher Training	745	793	759	666	742	621	697
Technical Colleges	694	753	793	868	1 025	1 237	1 254
Non-formal Education	249	367	452	412	825	815	1 204
Auxiliary and Associated Services	551	457	558	899	961	1 131	1 188
Other Programmes	190	202	236	292	391	407	417
Total expenditure	**38 723**	**39 828**	**43 235**	**46 903**	**50 943**	**54 470**	**57 638**
Economic classification							
Current expenditure	38 242	39 369	42 735	45 774	48 856	51 904	54 522
of which: Personnel	*35 252*	*36 221*	*39 237*	*41 603*	*43 646*	*46 430*	*49 144*
Capital expenditure	481	459	501	1 129	2 087	2 567	3 116

Source: National Treasury, Intergovernmental Fiscal Review 2002

Table 25. Trends in provincial education expenditure in R million.

R million	Estimated actual 2001/02	Percentage of total provincial expenditure 2001/02	Estimated increase in the medium term from 2001/ 02
Public Ordinary School Education	39 343	83.9%	6.3%
Independent School Subsidies	187	0.4%	16.1%
Special School Education	1 363	2.9%	-0.9%
Teacher Training	666	1.4%	-0.4%
Technical Colleges	868	1.9%	11.7%
Non-formal Education, including adult education	412	0.9%	25.0%
Auxiliary and Associated Services	899	1.9%	9.5%
Other Programmes	292	0.6%	9.7%
Total expenditure	**46 903**	100.0%	**6.2%**
Economic classification			
Current expenditure	45 774	97.6%	5.5%
of which: Personnel	*41 603*	*88.7%*	*5.9%*
Capital expenditure	1 129	2.4%	19.9%

Source: National Treasury, Intergovernmental Fiscal Review 2002

6.1.3 Personnel and non-personnel expenditure

With the incorporation of formal educator training into the tertiary sphere, it has to be expected that the cost of the programme in the provinces would be reduced. However, where teacher training colleges could not be readily incorporated into tertiary institutions, a number of provinces have opted to use the facilities and staff of previous teacher training colleges for in-service training programmes and as additional resources for schools.

The reduction in the budget for special schools signals the moves to incorporating learners with special education needs into mainstream education institutions within a context which provides support for these learners at district and provincial level. Learners with high level needs will be accommodated in special schools with high levels of resourcing and support allocated to them, but the rule will be that where possible, learners who experience barriers to education to be supported as much as possible in mainstream schools.

In 1998, during a period of budget instability, provincial education departments agreed to reprioritise their budgets to achieve a ratio of 85:15 as a target for the division of personnel expenses and other budget items. By doing this, provinces created space for other expenditure leading to quality improvement in the education system.

By 2002/03, even with the actual increase in personnel spending (by R6 billion between 1998 and 2001), the indications are that the target for personnel budget share of 85% will have been reached with a few provincial exceptions in provinces which had over 90% personnel expenditure when the targets were agreed on in 1998.

Table 26. Personnel expenditure in education by province in R million.

R million	2000/01		2002/03	
	Actual	% of Education budget	Medium Term Estimate	% of Education budget
Eastern Cape	6 771	94.2%	7 257	84.7%
Free State	2 674	89.4%	2 954	84.9%
Gauteng	5 841	85.7%	6 433	81.3%
KwaZulu-Natal	7 535	92.1%	8 692	87.8%
Limpopo Province	5 871	92.2%	6 581	89.1%
Mpumalanga	2 788	93.0%	3 099	84.8%
Northern Cape	814	84.3%	933	81.9%
North West	3 403	92.0%	3 801	88.6%
Western Cape	3 542	88.0%	3 896	84.5%
Total	**39 237**	**90.8%**	**43 646**	**85.7%**

Source: National Treasury, Intergovernmental Fiscal Review 2002

The reduced share of personnel in education budgets has allowed increases in expenditure on items such as infrastructure and physical resources (such as furniture), teacher development and textbooks. Capital expenditure in provincial education has nearly doubled from R1.1 billion in 2001/02 to R2 billion in 2002/03 to address the backlogs in education infrastructure. The proposed rapid growth in capital expenditure will need to be sustained through innovative management practices based on continuously updated and timely management information systems. The growth in non-personnel budgets will need to be translated into spending and ultimately quality learning and teaching.

Table 27. Provincial capital expenditure in the medium term in R million.

R million	2001/02			2002/03			2003/04	2004/05
	Capex	Capex as % of education estimated actual	Education capex as % of total provincial capital estimated actual	Capex	Capex as % of Education budget	Education capex as % of total provincial capital budget	Capex	Capex
Eastern Cape	206	2.6%	18.2%	406	4.7%	17.8%	422	764
Free State	59	1.9%	9.6%	144	4.1%	21.2%	155	206
Gauteng	191	2.6%	9.9%	405	5.1%	12.1%	503	519
KwaZulu-Natal	307	3.3%	11.3%	520	5.3%	18.8%	775	822
Limpopo Province	97	1.4%	7.7%	238	3.2%	16.8%	287	330
Mpumalanga	93	2.8%	9.7%	150	4.1%	16.6%	164	178
Northern Cape	2	0.2%	0.8%	12	1.0%	4.4%	17	19
North West	62	1.6%	9.3%	115	2.7%	11.7%	145	165
Western Cape	111	2.6%	9.7%	97	2.1%	7.3%	98	112
Total	**1 129**	**2.4%**	**10.6%**	**2 087**	**4.1%**	**14.9%**	**2 567**	**3 116**

Source: National Treasury, Intergovernmental Fiscal Review 2002

6.1.4 Non-personnel non-capital expenditure ('NPNC')

The slowdown in growth in personnel expenditure has created fiscal space for increases in other non-personnel expenditure. It is important to disaggregate the non-personnel non-capital 'NPNC' budget for the whole of the provincial education budget Vote into its more detailed components. The 'NPNC' expenditure for the Public Ordinary School Education Programme is the component of the budget available for items that create a functional learning environment. These include textbooks, stationery and teaching aids, electricity and telephone accounts, municipal services, bus subsidies, hostel costs, and maintenance, to name but a few. The provinces with the relatively highest 'NPNC' per learner expenditure for the Public Ordinary Schools Education Programme (Northern Cape, Gauteng and the Western Cape) also have the best senior certificate pass rates

The space that has been created for 'NPNC' expenditure will need to be carefully managed. Past experience has shown that, when budget practices on other components of the budget are unrealistic, pressure is brought to bear on the 'NPNC' budgets.

Table 28. Non personnel non capital (NPNC) - public ordinary schools).

	2000/01		2001/02		2002/03	
	NPNC	per learner (Rand)	NPNC	per learner (Rand)	NPNC	per learner (Rand)[2]
	R million		R million		R million	
Eastern Cape	201	94	559	276	424	
Free State	75	101	154	218	201	
Gauteng	388	270	373	258	571	
KwaZulu-Natal	182	69	314	118	322	
Limpopo Province	213	116	325	181	302	
Mpumalanga	81	90	122	136	215	
Northern Cape	111	564	111	571	107	
North West	170	189	210	238	220	
Western Cape	238	268	358	403	362	
Total	**1 660**		**2 526**		**2 723**	
Average		**143**		**220**		

Source: National Treasury, Intergovernmental Fiscal Review 2002
Notes: 1 Learner numbers - only public schools, 2 Learner numbers not yet available 3 Eastern Cape data as per published budget statements

6.1.5 Education expenditure per learner

Since 1998, the gap between the lowest and highest spending per learner across the provinces has narrowed. In 1998, KwaZulu-Natal had the lowest expenditure per learner at R2 575 and Northern Cape the highest at R4 526 per learner. This difference represented a gap of R1 951. In 2000, actual expenditure per learner ranged from the lowest in KwaZulu-Natal at R3 124, to R4 919 per learner in Northern Cape, representing a gap of R1 795.

It is of concern that the lowest rates of expenditure per learner are in the provinces with the highest incidence of household poverty - Eastern Cape, KwaZulu-Natal, Limpopo and Mpumalanga. Poorer provinces have more children of school-going age as well as a legacy of historical under-investment in education quality and high failure rates.

Table 29. Spending per learner.

| Province | Actual in Rands | | | Estimated actual |
	1998/99	1999/00	2000/01	2001/02
Eastern Cape	2 884	2 857	3 376	3 878
Free State	3 291	3 623	4 014	4 509
Gauteng	4 206	4 343	4 742	5 031
KwaZulu-Natal	2 575	2 675	3 124	3 481
Limpopo Province	3 165	3 240	3 481	3 720
Mpumalanga	2 851	3 067	3 335	3 725
Northern Cape	4 526	4 499	4 919	5 256
North West	3 374	3 632	4 100	4 496
Western Cape	4 171	4 161	4 530	4 875
Average	**3 449**	**3 566**	**3 958**	**4 330**

Source: National Treasury, Intergovernmental Fiscal Review 2002
Note: Public learner enrolment used for calculations

6.1.6   Conditional grants

Conditional grants for financial management and quality improvement have already been made available and R213 million was allocated for this purpose in the 2001/2 financial year by the National Treasury. This figure is set to increase by at least 5% in coming years. This grant was allocated according to the Equitable Shares Formula to provinces to fund special interventions such as systemic evaluation, management and teacher development, governance training, information system development, quality, school safety and farm schools interventions. The challenge for the education system is to ensure that these grants are used to enhance service delivery and to ensure that the grants do not displace planned expenditure.

Table 30. Allocations to provincial education departments for financial management and quality improvement from 2002 to 2006.

	2002/3 R ' 000	2003/4 R ' 000	2004/5 R ' 000	2005/6 R ' 000
Eastern Cape	41 500	43 367	45 969	48 727
Free State	14 132	14 768	15 654	16 593
Gauteng	27 591	28 833	30 563	32 397
KwaZulu Natal	49 575	51 805	54 914	58 209
Mpumalanga	16 375	17 112	18 139	19 227
Northern Cape	4 262	4 454	4 721	5 004
Limpopo	35 218	36 803	39 011	41 352
North West	17 946	18 753	19 878	21 071
Western Cape	17 721	18 519	19 630	20 808
South Africa	224 320	234 414	248 479	263 388

6.2   Private resourcing of education

Private resourcing of education takes the form of private contributions from parents, donations and bequests, activities of the non-Governmental sector (especially in the Adult Education and Training and Early Childhood Development sectors), and direct corporate investment. For the 2001/2 financial year, direct contributions to the Department of Education amounted to just under R130 million.

Total local assistance (received in kind) to the Department of Education in 2001/2 was R3.4 million (an increase from R1.4 million in 2000/1). This was used to provide technical assistance, equipment, materials and administrative support for quality improvement in the education sector. Open Society Foundation (R150 000), Billiton (R50 000), Coca Cola (R715 000), Old Mutual Group Insurance Schemes (R500 000), Telkom SA Ltd (R 500 000), Sasol Ltd (R300 000), Giya Arts Management and Events (R23 000), MTN (R500 000), and Transnet (R836 000), and other donors (R1.24 million) together contributed local assistance to the Department of Education totalling R4.7 million between 2000 and 2002.

It needs to be said, however, that there is extensive support of individual schools and education institutions by private individuals and groups which are not quantified and are not quoted here, although they contribute to education quality at local level. These contributions supplement state funding and have, in many cases, made a tremendous difference to the lives of teachers and learners in the affected schools.

6.3   International resourcing of education

The international community has also contributed to the development of basic education in South Africa and the extent of resourcing ranges from direct budget support to provision of technical assistance and funding interventions, buildings, bursaries, skills development, HIV/AIDS programmes, surveys, management and quality improvement programmes. The donors in the 2001/2 financial year were: the European Union (R46.8 million), the Government of the Netherlands (R10.9 million), the Government of France (R 0.976 million), USAID (R11.1 million), UNICEF (R2.6 million), the Government of Finland (R14.8 million), the Swedish International Development Authority (R12.4 million), the Government of Canada (R4.6 million), DANCED (R2.8 million), the Danish International Development Agency (R6.6 million) and the Carnegie Foundation (R262 000).

Total foreign aid assistance to the Department of Education amounted to R55.3 million in kind and R 59.0 million in cash in 2001/2. This amount includes all funding channelled through the Department of Education, even if it was spent on provincial implementation.

7 Taking EFA planning forward

7.1 Consultations

This Education for All Status Report, 2002 and Education for All country plan contains a summary of elements of the education system including policies, programmes and activities which have themselves been subjected to a great deal of consultation at national, provincial and local level in the administrative and political realm. In addition, various statutory bodies have been established to advise the Minister on different aspects of education while inter-governmental forums exist to consult, debate and collaborate on issues of importance to education.

However, it is acknowledged that the aggregated country plan requires extensive consultation within the education community. To this end, the Director-General of the Department of Education has set up the following to guide the development, consultation, validation and implementation of the country plan:

i. An EFA Steering Committee comprising officials with responsibility for implementing, monitoring and reporting on education programmes. This group has been set up to guide implementation and guide the consultation processes for the country plan and subsequent country reports post 2000.

ii. An EFA Technical Reference Group comprising education specialists to guide the technical development of the 2002 status report (incorporating the country plan) with the possibility of extending their participation in the development of future country reports.

    The Department of Education has also consulted with the South African chapter of the Global Campaign for Education (GCE) on the country plan which has undertaken to ensure that all civil society partners in education are informed of and involved in consultations, whether they are members of the Global Campaign for Education or not.

    Consultations on the country plan will include the Heads of Education Departments Committee (HEDCOM) and the Council of Education Ministers (CEM) and the plan will be finalised after consultation with the Portfolio Committee on Education and Cabinet. A national consultative meeting was to be held in November 2002 to launch the status report and to consult with key stakeholder groups (including national and provincial departments of education, teacher unions and organisations, religious groups, student organisations, school governing body associations, research and training organisations, and funders) followed by several smaller consultations with strategic partners on key aspects of the country plan. It may be necessary to establish consultative mechanisms around key aspects of the plan or even the EFA goals, and the national consultative meeting was to recommend the form and shape that these mechanisms should take.

    Future consultations with education partners like civil society will help to define their role in supporting implementation, improving policy compliance and enabling monitoring and reporting more clearly, thereby ensuring that the goals of education transformation and provision are met in South Africa.

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ANNEXURE A

DEMOGRAPHICS										
	Eastern Cape	Free State	Gauteng	KwaZulu Natal	Mpuma-langa	North West	Northern Cape	Limpopo Province	Western Cape	South Africa
Size in km^2	169 580	129 480	17 010	92 100	79 490	116 320	361 830	123 910	129 370	1 219 090
Share of country	13.9%	10.6%	1.4%	7.6%	6.5%	9.5%	29.7%	10.2%	10.6%	100.0%
Population (2001 mid-year estimates)	7 001 260	2 834 519	8 020 408	9 146 297	3 111 069	3 625 924	881 818	5 683 605	4 255 743	44 560 643
Share of National Population (2001)	15.7%	6.4%	18.0%	20.5%	7.0%	8.1%	2.0%	12.8%	9.6%	100.0%
Proportion African (2001)	87.2%	84.6%	69.9%	83.1%	89.4%	91.4%	34.8%	97.2%	22.4%	77.6%
Proportion Coloured (2001)	6.9%	2.8%	3.7%	1.3%	0.7%	1.3%	50.4%	0.2%	53.6%	8.4%
Proportion Indian (2001)	0.3%	0.1%	2.2%	8.7%	0.5%	0.3%	0.3%	0.1%	1.1%	2.5%
Proportion White (2001)	5.6%	12.5%	24.3%	6.9%	9.5%	7.0%	14.6%	2.6%	22.9%	11.6%
Population density (2001) people per square km	41	22	472	99	39	31	2	46	33	37
Average annual Population growth [1996-2001]	2.1%	1.5%	1.7%	1.7%	2.1%	1.6%	1.0%	2.8%	1.5%	1.9%
HDI^a change (1980-1996)	52.4%	19.6%	22.2%	34.7%	29.4%	27.1%	23.6%	70.3%	18.8%	23.2%

Sources : South African Institute of Race Relations Fast Facts 2001/2 Survey, Statistics South Africa, Mid-year Estimates 2001 and Labour Force Survey September 2001; Bureau of Market Research, University of South Africa; South African Reserve Bank; National Treasury; Department of Education.
a The human development index (HDI) measures socio-economic development according to life expectancy, per capita income, and level of education.
b Gross geographic product (GGP), that is, the provincial economy. National figure is GDP.
c People aged 15-65. For the strict and expanded definitions of unemployment, see 2001/02 Survey, p 213.
d Measured by the completion of Grade Six or higher by people aged 15 years and older.
e Includes day care centers, nursery schools, crèches, pre-schools, and other places where a minimum of six children were being cared for.
f Excludes learners at stand-alone pre-primary schools, special schools, adult basic and training schools, and technical colleges.

ECONOMY									
	Eastern Cape	**Free State**	**Gauteng**	**KwaZulu-Natal**	**Mpuma-langa**	**North West**	**Northern Cape**	**Limpopo Province**	**Western Cape**	**South Africa**
Proportion of National GDP (2000)	7.2%	5.3%	36.4%	12.6%	7.5%	6.1%	1.8%	4.1%	19.0%	100.0%
Gross Geographic Product (GGP)[b] per head (2000)	R8 202	R14 228	R34 718	R10 836	R19 372	R12 967	R15 487	R6 084	R35 377	R21 889
Unemployment rate (strict definition)[c] [2001]	32.0%	29.1%	28.2%	33.5%	29.9%	29.9%	20.1%	36.1%	18.4%	29.5%
Unemployment rate (expanded definition)[c] [2001]	48.4%	38.2%	34.4%	46.2%	41.5%	46.7%	38.9%	55.0%	26.0%	41.5%
Personal annual disposable income per capita (2000)	R7 792	R12 334	R25 988	R10 592	R11 088	R9 639	R12 481	R6 021	R20 777	R13 502
EDUCATION									
Adult literacy rate[d] (1996)	62.4%	67.1%	75.6%	63.2%	61.2%	62.7%	61.9%	58.9%	76.4%	66.6%
Pre-primary education centres[e] (2000)	3 231	1 665	5 308	5 684	1 367	1 174	422	1 987	2 644	23 482
Enrolment in public and independent schools[f] (2001)	2 033 832	716 021	1 561 359	2 698 453	903 997	893 144	197 101	1 816 189	918 030	11 738 126
Grade 12 Senior Certificate Examination pass rate (2001)	45.6%	59.0%	73.6%	62.8%	46.9%	62.5%	84.2%	59.5%	82.7%	61.7%

Sources : South African Institute of Race Relations Fast Facts 2001/2 Survey, Statistics South Africa, Mid-year Estimates 2001, Labour Force Survey September 2001; Bureau of Market Research, University of South Africa; South African Reserve Bank; National Treasury; Department of Education.

a The human development index (HDI) measures socio-economic development according to life expectancy, per capita income, and level of education.

b Gross geographic product (GGP), that is, the provincial economy. National figure is GDP.

c People aged 15-65. For the strict and expanded definitions of unemployment, see 2001/02 Survey, p 213.

d Measured by the completion of Grade Six or higher by people aged 15 years and older.

e Includes day care centres, nursery schools, crèches, pre-schools, and other places where a minimum of six children were being cared for.

f Excludes learners at stand-alone pre-primary schools, special schools, adult basic and training schools, and technical colleges.

National Consultative Meeting on EFA, 22 November 2002 National Department of Education, South Africa		
Group	**Key Issues**	**Recommendations**
1. Early Childhood Development (ECD)	- Advocacy, lobbying and political will needs to be improved. - Implementation concerns - 0-4 year old policies not implemented - concerns about non-support at community based sites - Fast track access to ECD: projection of 9% increase per year on the system will meet the 2015 goals, but it needs to be sustained - Issue of financing-Clarity on dedicated funding, conditional grants - Better regulatory framework for ECD providers, especially 0-4 year olds care givers - Quality control of ECD is urgently needed - Provincial inequities need to be reduced - Contextualized with poverty alleviation, health welfare, etc. - Feeding schemes, nutrition - Strengthen governance at all levels - Math, science & life skills focus in ECD	- An EFA workshop at provincial level to eliminate provincial differences - Reflection of backlogs must be identified - Concerns about HIV/AIDS throughout the report should be addressed
2. General Education and Training	- Gender inclusivity important - Equity and Access important - Quality important - Absence of resources (for fee payment) - Vestiges of racism (discriminatory practices) need to be eliminated - Need for information on "learners" outside the system (and collaboration to identify these) - Quality of offerings - Transport - Needy parents not being aware of the relief provided in	- One-to-one engagement of parents (eg. Consistent attendance at meetings) is essential. - Management skills for principals is required - Learn lessons from cases of " excellence" despite adverse conditions (eg. in rural schools which perform well) - Redefine roles of districts as closest points of delivery to schools (capacity to monitor and support)

	- the policies (fee exemptions are available) - Monitoring to ensure access to education by the most needy - Need for school attendance of officials to ensure compliance with SASA and policy guidelines - Costs of Education high and need to be reduced - Definition of feeder schools, as they are used to exclude - Need to monitor norms and standards for funding of education. - Violence bars learners from certain schools (eg. Western Cape) - Timely identification of learners with disabilities - Xenophobic practices need to be dealt with - Need for flexibility to accommodate social realities (eg. HIV/AIDS affected families) - Need to empower SGBs in rural areas to be more accountable (monitoring of quality of education at local level) - Sexual violence (needs attention as it is of great concern) - Proper infrastructure (water and sanitation) - Need monitoring and implementation of policy on mainstreaming of gender in curriculum management; teacher development	- to monitor and support) - Set clear indicators of compliance to facilitate monitoring - Assist poor learners with transport and uniform etc. - Ways and means to upscale projects that are successful (eg. Maths, Science and Technology projects) - Term of office of SGBs is short, and leads to disruption
3. Adult Basic Education (ABET)	- Use of ABET funds need to be clarified (how much is spent on ABET and how much on FET) - Other functional skills other than literacy (qualification programmes) for ABET learners need to be addressed. - Work done by NGOs, CBOs is not reflected on the report - Programmes registered in the NQF are not implemented in some provinces - High drop out rate due to unemployment, lack of fees, seasonal problems, inaccessibility to centers (schools locked or closed)	- Professionalisation of all adult educators, including managerial skills for centre managers needs to be improved - Incentives (funding or bursaries) for adult learners. - Improve link between Education Department, SETAs and Department of Labour to improve access to adult education for labourers

		- Adult learners excluded from funding and the right to education is thus denied - Policy not implemented by all provinces (ie. ABET Act regulations only done by three provinces) therefore level of implementation needs speeding up.	- Strategy needed to popularize and create interest in Adult Education. - Mechanisms to reduce barriers and problems experienced by learners eg. crime (evening classes), access and retention of learners. - System flexibility for ABET - ensure that all aspects affecting ABET are flexible (eg. curriculum, calendar, centers and etc.) - Mechanism/strategy to accelerate and deepen education programmes for women (since more women are illiterate and unemployed). - Monitoring compliance to policies and implementation in provinces urgently needed
4.	Further Education and Training	- Neglect of FET issues in rural areas - Gender involvement in policy formation, implementation and monitoring. Dissemination of policy information - Curriculum needs to reflect societal transformation, (changing subject content in FET/Colleges) driving reform - To promote access, financial assistance is key. Central resources through central funding schemes - Women's participation in science, Maths and engineering needs to be increased. - Access of adult to FET institutions through SETAs - Improve quality for Higher Education - Linking theory and practice is imperative	- Integration of input of stakeholder in the entire policy process - Decentralize information to stakeholders - Need to receive mandates from constituencies, both leadership and rank and file - Role for academics who need to undergo retraining - Disseminate information on Further Education and training concept (particularly rural areas) - Identify areas for retraining, donors and other bodies to contribute in line with policy