CHAPTER 2

Putting the development of a new system into context:

A review of the first steps towards the development of a new system

Chapter 2 examines the context of change in the two halves of the decade since 1994. This chapter provides an overview of the internal and external environment in the education and training system and, to a certain extent, describes the local, national and global context of education reform.

2.1 Context of the first phase of change (1994 - 1999):
   systemic change

The first phase of change in the education and training system, in the period 1994 to 1999, was concerned with the literal reconstruction of the system within a government that, itself, was undergoing a reconstruction of structures, systems, protocols and relationships.
Within the State, Government had to reinvent and reconstruct organisational, structural and administrative protocols, structures, capacities and systems, while at the same time making the massive effort necessary for formulating the policy and laying the legislative foundation for the integrated system that it had envisioned. Within these first five years, it became clear that the institutionalisation of reform would take decades and would need to be subject to review, particularly where responsibility for the same function or competency was assigned to different spheres of government. It has emerged that this is particularly true where implementation takes place against the backdrop of inequality in capacity across the system, particularly in terms of administrative, managerial and material capacity, which existed in 1994 and persists even today. The process of budget reform and reprioritisation was substantively implemented in this phase, while the massive redeployment and rationalisation exercise saw the incorporation of public servants from the different administrations into one national and nine provincial administrative structures.

At the end of 1999, the Department of Education’s assessment of the education and training system was honest. The assessment stated that, despite the achievement of one united national system with nine provincial sub-systems, the successful introduction of nine years of compulsory schooling, the reprioritisation of funding towards improving the quality of inputs for teaching and learning, the establishment of governing bodies at schools, the consolidation of the teaching service, the establishment of a National Qualifications Framework, and the introduction of the outcomes-based Curriculum 2005, the transformation process had not yet made quality learning accessible to the poorest South Africans.

Despite the massive inputs directed towards education and training, including a substantial increase in the annual investment in textbooks and substantial increases in the number of young people and adults across the system who were able to access and participate in learning activities, challenges persisted. Inequality was still a problem faced...
within the system and in society, and the poor still experienced an unacceptably low quality of education service delivery. These people also suffered the greatest disadvantages in terms of social and economic opportunities at school, and after leaving the system, in life and the world of work. Challenges faced in the development of the new administrative and governance structures resulted in delays in the appointment of strategic managers and leaders throughout the administration, with negative consequences.

At national level, organisational transformation was undertaken with assistance from Australian public service practitioners who, starting in 1996, sought to review and reorientate the organisational culture, systems, procedures and staff development profile in order to align these with the new vision for the education and training system. However, provincial departments, which have more diverse and complex structures, have not all been able to undergo such intense organisational development in a sustained manner since 1994, although capacity building in financial management and quality improvement has been enhanced in these departments through the administration, in the second half of the 1990s, of a conditional grant that, amongst other initiatives, resourced the Education Departments Support Unit (EDSU). In addition, Education Management and Governance units were established to complement the District Development Project in building capacity at the local administrative structure closest to most learning sites.

It must be said, however, that without the systemic changes brought about in the first five years of democracy, which resulted in the foundations (policy, legislation, protocols, structures and systems) required for the new education and training system, it would not have been possible to focus on accelerating the implementation of reform-related interventions in the next five years. It may be argued that the Department of Education, following the 1999 assessment and in a bid to accelerate interventions in the areas of need highlighted in the assessment, became much more involved in activities related to direct implementation. This was particularly the case with aspects
of education and training implementation that were of national importance and that needed to be highlighted as areas of concern in the public domain (such as the need to improve access and equity, and stop discrimination at the level of institutions). This may have been necessary at the time (the late 1990s), preceding an increased implementation effort and in response to contestation, but it is clear that the Department of Education, having highlighted these critical aspects in the public domain and having assisted in key capacity-building initiatives, would, in the next decade, need to refocus on its key competencies in the elaboration and development of the education and training system.

In the years from 2004, the Department of Education will need to strengthen its monitoring and evaluation role substantively and will need to fulfil this role with respect to all aspects of the education and training system. Furthermore, the Department of Education will need to strengthen its strategic oversight and direction of sustainable capacity-building initiatives at provincial level, particularly in areas with weak managerial and administrative systems at national or provincial level. This means that the Department of Education would need to engage with the specific factors affecting the impact of interventions, provide technical leadership in key areas of intervention, and marshal resources with and on behalf of provinces to make developmental gains and strengthen educational outcomes.

2.2 Context of the second phase of change (1999 - 2004): from frameworks to action

The second phase of change was characterised by a focus on implementation and institutional reform, while consolidating system stability and predictability. Spending levels and financial management were strengthened with the entrenchment of budget reform, and stability in the system prevailed. Apart from this, the debate on education and training moved from access and participation (which had improved dramatically since the early 1990s) to issues affecting the quality of teaching and learning processes (including governance and management) and inputs at the local and institutional levels. Institutional reform was further highlighted in this phase as Further Education and Training reform and Higher Education and Training reforms were implemented. The debate was about how to sustain the large gains in participation made since the democratic transition, particularly in schooling.

The focus of the system was on sustaining learner participation, by improving the effectiveness and quality of the outcomes of the education that learners received, once they had gained access to educational institutions. During this period, greater efforts were made to improve opportunities for the poorest in the system. This was done by increasing efficiency and by reprioritising the budget to improve quality, through a combination of improving efficiency, reprioritising the budget for quality improvement by expanding the non-personnel allocations to learners, targeting funds and resources (personnel, infrastructure, nutrition, and other support for teaching and learning) at the poor, upgrading and developing teachers’ skills, implementing a revised curriculum for schooling, and expanding the student financial aid offered at higher education institutions.

In President Mbeki’s State of the Nation address in June 1999 he called for a renewed effort (and new partnerships) in implementation and service delivery, particularly in education and training, the decisive drivers in the efforts of nation building, and in social and economic development. This set the stage for accelerated efforts in implementation in the education and training system. In July 1999, Minister Asmal announced the Tirisano Call to Action and urged the social mobilisation of all partners in the education enterprise to work towards building an education system for the 21st century. This phase of action and intervention focused on cooperative governance, organisational effectiveness, the rebuilding of schools as community resources, infrastructure development, teacher development, ensuring the success of the curriculum, enhancing the reform of the further education and training and higher education sectors, and the fight...
against HIV/AIDS. The Tirisano Implementation Plan highlighted key priorities for the system, and made the link between policy, planning, budgeting and implementation more explicit for the education and training sector. Although it formed a useful tool for the mobilisation of resources and efforts around key issues in education and training, the Tirisano Programme of Action did not include all the interventions in the education and training system. Interventions such as those in corporate services, gender equity, international relations, early childhood and special needs education were not explicitly stated in the plan, although considerable work was done in these areas during this time.

The Tirisano Plan, interpreted as being interventionist in many quarters, marked a turning point in the engagement of most education partners in the education and training system. For the first time ever, the Department of Education laid open its detailed plan of action for public scrutiny. Overall, this was welcomed as a step in the right direction. Members of the public who were interested in developments in education could now visualise how the different aspects of the system linked together, and what the Department of Education’s plan of action was. It is no coincidence that the frequency of hostile media reports on strategic direction in education and training declined dramatically at this time.

In this phase, inter-governmental relations at national level were integrated through the Cluster System, and education and training was placed in the Social Cluster in terms of Government’s social development agenda. Social Cluster priorities flow from government priorities and consist of crosscutting programmes and issues related to specific social sector concerns. Crosscutting priorities (incorporating infrastructure and public works interventions) include the following: the Integrated Sustainable Rural Development Programme; the Urban Renewal Programme; HRD Strategy interventions; HIV/AIDS interventions; and the Nepad social sector issues. Specific social development priorities include: Poverty alleviation (income and asset poverty alleviation), including the provision of social grants and access to finance for the purchase of land; access to early childhood and basic education; food security enhancement; water and sanitation; disaster relief; the prevention and management of emerging and re-emerging diseases, including tuberculosis and malaria; the promotion of social cohesion; and the promotion of social justice within the population. The Cluster System is maturing and interventions made by government departments are aligned much more strongly with government priorities than just after the democratic elections.

The introduction, in 1999, of the Public Finance Management Act (PFMA) improved accountability within Government and to Parliament, and has led to improved budgeting and financial management at national and at provincial level. This, in turn, has enabled improved service delivery, especially in the education and training system.

2.3 Inter-governmental coordination

As described above, the coordination on the Human Resources Development Strategy has, since 2001, seen a deepening collaboration between the Ministries of Labour and Education at national and, increasingly, provincial level. This has yielded results in terms of the review of the National Qualifications Framework (NQF) and the collaboration in implementing the Skills Development Framework. Furthermore, Government’s Cluster System enables key sectors in Government to cooperate in a structured way in respect of issues of national importance.

Critical relationships have been forged with other departments and other sectors of government, at national and at provincial level, and these relationships continue to deepen. Most notable of these, at national level, is the interaction with the National Treasury around resourcing priorities in the system, the interaction with the Department of Labour on broader human resource development issues, and the long-standing partnership between the Departments of Health and Education at all levels in combating the effects of HIV/AIDS and in the implementation of the National School Nutrition Programme.

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An assessment of ten years of education and training in South Africa
These interactions continue to be strengthened and contribute to the achievement of the mandate of the education and training system, and to Government’s development mandate.

With its readmission into the international diplomatic fold, South Africa committed itself to international development priorities such as the Millennium Development Goals (advocating poverty reduction and sustainable development), Education for All (EFA) goals (improving literacy, early childhood, primary and secondary education, gender equality, and quality in education and training), and NEPAD’s continental agenda for education development (adopting EFA, improving post-primary education, dealing with HIV/AIDS, improving the development of medium- and high-level skills through centres of excellence, reversing the brain drain, and strengthening curriculum reform), all of which emphasise the role of education and training systems in social and economic development.

Of course, the situation in the national education and training system cannot be divorced from external factors such as those affecting economic growth globally. In many countries, there is tension between global development goals and global development realities. Developing countries have adopted global development goals, but the reality is that many simply do not have the means to achieve them, and even if they did adopt poverty-targeted policies, the levels of poverty are so high, and the amounts available to be distributed so low, that they would barely make a dent in the profile of the country in development terms. These tensions frequently have an impact on the resourcing of key social services. For example, persistent exclusion from agricultural markets in the developed world has a direct effect on GDP and growth and, therefore, on the amounts in the fiscus available for education and health expenditure, and, therefore, on the growth trajectory of countries. It is true that efficiency gains can be achieved by streamlining current operations and systems, but the emerging call to action is a wider one for increased investment in education and training systems as a whole in the global arena. Pressure is mounting for discussions on the achievement of development goals to be partnered with discussions on terms of trade in the developing world. As a result of pressures on resourcing, many countries have seen the development of a two-tier system, in which those who can afford it, opt out of the worsening public system (notably for health and education services). Such a situation creates a parallel system and concurrently weakens the public system in terms of accountability and quality. This cannot be allowed to happen, and discussions on strengthening investment in education and training continue at local and at international level.

Developing countries are also experiencing increasing pressure as a result of the fact that teaching staff are moving to more developed countries. These pressures create tensions in education and training systems, seeing that the recruitment and incentives offered by supplying countries must be balanced with the right of the individual to freedom of movement and choice of employment.

In addition, pressure has been exerted on education and training systems globally in the years following the start of the new millennium, as heightened global security concerns have precipitated a shift away from multilateralism towards unilateral action by certain States. This, in turn, threatens to create global resource leakages away from development assistance towards ‘security-related activities’, which, together with the declining foreign direct investment patterns experienced by developing countries, do not bode well for education development internationally.

It is in this rapidly changing context that education and training systems have had to undergo reform. The information technology bubble has reinforced the need for the development of citizens who are able to adapt to rapidly changing conditions in society and in the world of work. Increasingly, developing countries are finding that the need to expedite collaboration in substantive ways to bring about growth and development is hampered by the vagaries of global markets, which are dominated by the large economies of the world.