Education in a Global Era
Challenges to equity, opportunities for diversity

Fourteenth Conference of Commonwealth Education Ministers, Halifax, Nova Scotia, Canada
27 - 30 November 2000

Country Paper: South Africa
EXECUTIVE SUMMARY

This country paper was prepared by the Department of Education in preparation for the Fourteenth Conference of Commonwealth Education Ministers to be held in Halifax, Nova Scotia in November 2000. The paper responds to the ‘Guidelines for Country Papers’ issued by the Commonwealth Secretariat (2000), motivating for countries to explore the interface between education and the issues of globalisation, values, and HIV/AIDS.

We believe that the Fourteenth Conference of Commonwealth Education Ministers presents a landmark opportunity. The end of the 20th Century and the beginning of the 21st Century represents an important moment in the history of our nations, individually and collectively. Future generations of historians will look back on this moment and judge our wisdom and foresight as we share experiences and chart our paths forward.

In this paper we review the process of educational transformation in South Africa as we enter the 21st Century. Since the coming of democracy in 1994, the core task of the South African government has been to take down the scaffolding of apartheid, and replace it with a new system that promises well-being, respect, and expression for all South Africans. The project of educational reform has been a central part of this massive reconstruction and development project.

The profound changes taking place globally during this same period frame our national project. While the internationalisation of economy and culture arguably started in its most dramatic form at the beginning of the last century, the qualitative and quantitative elaboration of real-time economic and cultural integration represents a new articulation of the international arena. South Africa has taken a conscious decision to actively understand the emerging form and function of globalisation, and to locate itself as a competitive economy within this international context.

Thus, the transformation of education in South Africa has been driven by two concurrent imperatives. First we must overcome the devastating legacy of apartheid and provide a system of education that ensures that South Africans have the knowledge, values, skills, creativity, and critical capacities required to build democracy, development, equity, cultural pride, and social justice. Secondly, we must establish a system of lifelong learning that will enable South Africans to respond to the challenges of the 21st Century. This paper outlines our efforts to address and reconcile these two imperatives.

In the first section of the paper, we provide a brief overview of the political, social, and economic context of educational transformation. The economic and social challenges facing our nation – characterised most importantly by rich cultural and linguistic diversity, deep inequities, high levels of poverty and unemployment, and slow economic growth – largely frame the education challenge within South Africa.

The following section provides a brief overview of the educational transformation process to date. The post-1994 educational reform process has been driven by the goals of access, equity, redress, quality, efficiency and democracy. These goals have guided the development of a new policy framework for the overall project of educational reform, including the development of an integrated approach to education and training based on a national qualifications framework, the restructuring of school governance and funding, the introduction of a new curriculum underpinned by outcomes-based education, the provision of compulsory basic education, the establishment of new education management structures, and the restructuring of the higher education system. These transformation objectives, in the context of wider demands on a limited fiscus, as well as the practical implementation challenges at the chalk-face, continue to guide policy formulation and development. In the context of the massive challenges facing the South African education system, we have developed an implementation plan called Tirisano (a Sotho word meaning ‘working together’), which identifies our priorities for the first five years of the new century.

In the following section we reflect on our experience of reconciling the global challenges with the
challenges of the post-apartheid reconstruction project in education. Some challenges of the 21st Century present opportunities consistent with our post-apartheid goals of social and economic reconstruction. We examine these consistent challenges, as well as our vision for engaging with them to improve the lives of the people of our nation. We then characterise our assessment of the more negative challenges of globalisation — challenges that we believe run counter to our reconstruction objectives and to the needs of the poor and vulnerable beyond our borders. While presenting massive challenges, we believe that with clear vision and determination, these negative tendencies can be better mediated in the interest of the world’s poor and marginalised.

One of the most daunting challenges as we join the 21st Century is the complicated area of values in education. While the last century undermined human values in South Africa through genocide, colonisation and apartheid, the coming century threatens to bring other forms of mental and cultural domination. In Section 5 we discuss our efforts to maintain the integrity of local and human values in the context of our apartheid history and the emerging marketisation of global culture.

Our entire reconstruction and development project in the 21st Century will depend upon our determination and creativity in addressing the HIV/AIDS pandemic. While daunting, we remain committed to understanding its constitution, and determined to respond in a holistic way to its challenges. In Section 7 we explore the impact of the HIV/AIDS pandemic on education in South Africa, and our efforts to respond to the pandemic. Responding to the HIV/AIDS pandemic, and supporting South Africans who are both infected and affected, will continue to demand priority focus across government and within education in particular.

In the final section we reflect on the challenges facing us as we enter the new century. While we must address the new challenges and opportunities associated with the coming century, we must also reaffirm our commitment to the more enduring challenges rooted in our past. In the case of South Africa, many of the most central challenges of the 21st Century are rooted in our troubled past. As we move into the next century, we must continue to rebuild our public service with an emphasis on quality, accountability, transparency and efficiency. We must continue to fight the fierce racism of our past. We must continue to invest in education in effective ways and within inherited budgetary constraints. We must continue to focus on establishing innovative partnerships with civil society, and on building a dedicated community of educators. We must continue to focus on building the basic quality of our general, further and higher education systems.

While many of our most important challenges have their roots in our history, there are important new opportunities and challenges emerging in the new century. Some observers in South Africa consider ‘globalisation’ to be simply a new face of age-old domination patterns. As an African nation, we are familiar with the ability of domination to adopt different guises. However, to underestimate the new opportunities and challenges, or to locate ourselves as ‘victims’, would be an historic mistake. While some commentators despair at the complexity of the current global environment, particularly with reference to the welfare of developing nations, we take a slightly different view. While cognisant of supra-national developments, we cannot stand by and watch the erosion of our efforts to build a democratic society. The situation is complex and therefore affirms the need for new and different responses from us all. We look forward to this conference as an important forum for sharing experiences and vision, to enable our countries, individually and collectively, to better mediate the trajectory of globalisation in the future.
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<th>Acronym</th>
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<tr>
<td>ABET</td>
<td>Adult Basic Education and Training</td>
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<tr>
<td>AIDS</td>
<td>Acquired Immune Deficiency Syndrome</td>
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<tr>
<td>CBO</td>
<td>Community-Based Organisation</td>
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<tr>
<td>CIDA</td>
<td>Canadian International Development Agency</td>
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<td>COLTS</td>
<td>Culture of Learning, Teaching, and Service</td>
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<tr>
<td>DANIDA</td>
<td>Danish International Development Agency</td>
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<tr>
<td>DfID</td>
<td>Department of International Development (UK)</td>
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<tr>
<td>ECD</td>
<td>Early Childhood Development</td>
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<td>ELSEF</td>
<td>Education for Learners with Special Needs</td>
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<td>EMD</td>
<td>Education Management Development</td>
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<td>EMIS</td>
<td>Education Management Information System</td>
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<td>FET</td>
<td>Further Education and Training</td>
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<td>FFC</td>
<td>Financial and Fiscal Commission</td>
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<tr>
<td>GDP</td>
<td>Gross Domestic Product</td>
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<tr>
<td>HIV</td>
<td>Human Immuno-deficiency Virus</td>
</tr>
<tr>
<td>KZN</td>
<td>KwaZulu-Natal Province</td>
</tr>
<tr>
<td>NGO</td>
<td>Non-Governmental Organisation</td>
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<tr>
<td>NQF</td>
<td>National Qualifications Framework</td>
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<tr>
<td>OBE</td>
<td>Outcomes-Based Education</td>
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<tr>
<td>RDP</td>
<td>Reconstruction and Development Programme</td>
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<tr>
<td>SAQA</td>
<td>South African Qualifications Authority</td>
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<tr>
<td>SGB</td>
<td>School Governing Body</td>
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<tr>
<td>SIDA</td>
<td>Swedish International Development Agency</td>
</tr>
<tr>
<td>UNDP</td>
<td>United Nations Development Programme</td>
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<tr>
<td>UNICEF</td>
<td>UN International Children’s Emergency Fund</td>
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1. INTRODUCTION

1.1. Background

In South Africa, the last decade of the 20th Century will probably always be associated with the coming of the country’s first national democratic elections. Centuries of struggle against colonial and apartheid rule culminated in a relatively peaceful transition to democracy. The lines of people waiting to cast their vote in 1994 came to represent a moment when fear was replaced by hope, repression replaced by democratic change, exclusiveness and division replaced by the possibility of inclusiveness and unity.

It was during this decade that South Africa’s massive national project was born – to take down the scaffolding of apartheid and replace it with a new system that promises well-being, respect and expression for all South Africans. It was a project that challenged us as a nation to rethink and rebuild our nation from inside out – our economic policies, our political life, our system of education, our health, our concepts of justice, our sense of identity. It challenged us on a national level and on a personal level to reconstruct our understanding of what it means to be alive and South African and facing the 21st Century.

The massive changes taking place globally during this same period served to frame our national project – the breaking down of physical and metaphorical walls, the massive revolution in information and communication technologies, the growth of an international culture largely driven by materialism, and the transcendence of power away from the economic logic of bread-buyers towards the uncertainty of the conductors of massive capital and financial flows.

As South Africans we make for an unusual case study as we step into the 21st Century. Like other nations of the world, we are committed to understanding the emerging function and form of globalisation, and to capturing its possibilities to better the quality of life of our people. Emerging from a period of isolation, we have much to learn. Our attention is captured by the many ways in which we can work as a neighbour and partner with an international community increasingly united by a commitment to human rights, transparency, accountability and equity. Yet, at a time when many observers are suggesting the end of the nation state, we have embarked upon a phenomenal national project that strongly asserts the responsibility of the government, in partnership with civil society, to construct the scaffolding upon which a new national character can take shape. At a time of ‘global homogenisation’, we commit ourselves to reclaiming our history and culture as the solid ground for building a sense of meaning and vision for our young people. Far from a neutral global entity, we have begun to better understand our specific geographic, economic and cultural location as a nation in Southern Africa, of the African continent, and within the ‘south’ in a global world where power and wealth are unequally distributed.

1.2 The Context of Globalisation

President Thabo Mbeki has recently emphasised to South African leaders that the meaning and implications of globalisation for South Africa, and for the developing world more generally, will differ in significant ways from the analysis of globalisation emerging from historically industrialised nations. It is our task both to understand the impact of globalisation in our context, and to formulate a vision with which to positively interact with the emerging system.

We consider globalisation to be both a historical process and a reflection of ideology. While the process of the internationalisation of economy and culture arguably emerged in its most dramatic form at the beginning of the last century, the qualitative and quantitative elaboration of real-time economic and cultural integration represents a new articulation of the international arena.

Most analysts agree that the current era of globalisation was unleashed by political decisions within a few nations, accompanied by the establishment of a series of institutional mechanisms to encourage, if not force, other nations to follow suit. Globalisation is most often characterised along economic and
technological axes – reflecting the deregulation of financial markets, the development of technological infrastructure (that allows for real-time international economic transactions), the liberalisation of cross-border transactions in most countries, the nature of new financial products, the speculative movements of financial flows, and institutions which uphold the ideology and ‘new rules’ among developing nations. With the decline in profit margins in both agriculture and manufacturing, the development of the ‘information economy’ was largely driven by the conceptual drivers of capitalism – the search for wider profit margins and expanding markets (Castells, 1998). The current landscape of globalisation has been made possible by the phenomenal technological developments of the past decade. This historical process has led to a revolution in world economies comparable to the industrial revolution, wherein the importance of ‘energy’ has been superseded by the centrality of knowledge and information, at least within the context of cyber economics.

South Africa has taken a conscious decision to actively understand the emerging form and function of globalisation, and to locate itself as a competitive economy within this international context. At the same time we have strongly affirmed our responsibility for developing a democratic nation reflecting the values of human rights and human dignity.

1.3. The Dual Challenge of Education Transformation

The transformation of the post-apartheid system of education has been framed by the need to rebuild the fibre of our nation in the context of our apartheid past and to address the emerging challenges of the global era. The task of transformation is to reconcile these two challenges:

- **the post-apartheid challenge**: the democratic project of overcoming the devastating legacy of apartheid to ensure that South Africans have the knowledge, values, skills, creativity, and critical thinking required to build democracy, development, equity, cultural pride, and social justice;

- **the global competitiveness challenge**: to establish a system of lifelong learning that will develop the knowledge, skills and competencies required to facilitate innovation, social development and economic growth in the 21st Century.

This report provides an overview of the project to transform the South African education system with particular reference to the interface between these two challenges. We begin with an overview of the South African context (Section 2) and the context for education transformation (Section 3), and briefly review the current framework for transformation – Tirisano – that identifies our priorities with regard to these two challenges (Section 3.6).

In Section 4 we reflect on our experience of reconciling the post-apartheid challenge with the global competitiveness challenge. We begin with a review of the global challenges that we believe concurrently support our national democratic project (Section 4.1). The policy and programmatic framework for the new education system in South Africa reflects our attempt to effectively respond to such ‘consistent challenges’ – the provision of quality education for all, transforming the curriculum, building a system of lifelong learning, using technology to enhance educational goals, and building the social safety nets required to support educational objectives.

There are other challenges emerging from globalisation, however, which we believe run counter to our national democratic project and the needs of the poor and vulnerable beyond our borders. We characterise these negative tendencies of globalisation (Section 4.2) – including the tendency to commodify education, the influence of market values on social development, and the political economy of the emerging global order. These tendencies, if left unchecked, can undermine the best efforts of education and development in the developing world.

In Sections 5 and 6 we focus on South Africa’s response to two of the most important challenges of the
21st Century – infusing ‘values’ into education, and confronting the pandemic of HIV and AIDS.

We conclude by raising some of the key issues that face us as we leave the 20th Century and prepare for the 21st (Section 7). Future generations will judge us by our ability to confront the future without becoming blind to our past. We consider the key challenges, inherited from our troubled past, that will continue to demand our attention in the new era, as well as the key challenges for South Africa emerging in the 21st Century. We believe there is especially important scope for nations of the Commonwealth to share experiences and vision in these areas, and to articulate a common approach to address the more negative tendencies of globalisation.

2. The South African Context

2.1. A Social and Political Sketch

The social and political landscape of South Africa has been shaped by colonial rule and apartheid. The social and economic policies of colonialism, exaggerated under apartheid, were designed to maintain white hegemony and prosperity to the exclusion of other South Africans. All policies were constructed racially, with both the public and private sector micro-managed on the basis of a strict racial hierarchy.

The first democratic government in 1994 inherited a South Africa reflecting this history – a South Africa deeply divided along the lines of race, where both the quality of service provision and individual economic and social status largely reflected racial divides (Table 1). Beyond the deep racial divide, there are other ‘dividing lines’ inherited from the past. The historical move towards urbanisation has left rural areas devastated economically and isolated from social development processes. Pockets of rural affluence built around white farms co-exist with extreme poverty among rural blacks. Urban areas tend to have better facilities and services. The gender divide has led to a feminisation of poverty. Female-headed households have a 50% higher poverty rate than male-headed households.

South Africa has a population of approximately 43.1 million people. African blacks constitute the majority of the population (76.7%), with the balance being whites (10.9%), Coloureds (8.9%) and Indians (2.6%). About 54% of South Africans reside in urban areas, but rates of urbanisation vary substantially by province. Approximately 52% of the population are female, and 34% of the population is under the age of 15 years. While South Africa has a young population, the rate of growth of the population (1.9%) has decreased significantly in the last decade. Table 2 illustrates important population patterns across provinces.

South Africa has 11 official languages. While English is growing as a language of diplomacy and economy, the largest home languages are Zulu (22.7%), Xhosa (17.7%), Sotho/Pedi/Tswana (24.9%), and Afrikaans (14.3%). South Africans are skilled linguists, with the majority of people speaking more than one language.

The largest religious grouping in South Africa is Christian. Churches of the Christian faith cover a wide range of traditions, including Africanised interpretations. While apartheid declared Christianity as a state religion, there are large Muslim, Jewish, and Hindu communities in South Africa. Post-1994 education policy has promoted religious tolerance and diversity.

The legacy of apartheid can be seen clearly in the so-called ‘digital divide’ in South Africa. Only 56% of South Africans have access to electricity (Gillwald, 2000:1). Nine % of households have a telephone – 90% of white households, 11% of African households, and only 1% of rural households. Since 1985, 1.3 million new telephone lines have been installed (SAIRR, 2000: 181). There is also a phenomenal growth in wireless telephony, estimated to overtake fixed lines by the end of 2000. Again, this technology reflects historical patterns with 3% of the African population and 19% of the white population owning cellular phones in 1998. Internet access is still low and racially skewed compared to international standards.
After decades of struggle, and through a process of protracted negotiations in the early 1990s, a multi-party democratic South Africa was born. An Interim Constitution was drawn up, based on the principles of democracy and human rights. The first democratic elections were held in 1994, culminating in the formation of a Government of National Unity led by the African National Congress. The Constitution of South Africa that was adopted in 1996 provided the basis for the integration and deracialisation of policy across the public sector (RSA, 1996d). The Constitution frames a system of co-operative governance, with the national level devolving significant powers to the nine provinces. A national parliament has final sanctioning powers, and ensures that the provisions of the Constitution are not contravened by the actions of provincial legislatures. The Constitutional Court guards the rights and provisions of the Constitution and determines whether actions of the State are in accordance with constitutional provisions.

The profound political and social challenge of South Africa is to redress past divisions in the spirit of human rights and equity, and at the same time to celebrate a cultural and social diversity upon which an innovative and enriched nation can be built.

Table 1: Racial Inequities: Education and Unemployment

<table>
<thead>
<tr>
<th>Region</th>
<th>Education Levels, People Under 20: 1996</th>
<th>Unemployment Rate: Registered Definition %</th>
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<tr>
<td></td>
<td>White</td>
<td>Black</td>
</tr>
<tr>
<td></td>
<td>Male</td>
<td>Female</td>
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<tr>
<td></td>
<td>24.3</td>
<td>2.76</td>
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Table 2: A Population Sketch: Urban, Density, HDI, Race, and Languages by Province

<table>
<thead>
<tr>
<th>Region</th>
<th>% of Population</th>
<th>% Urban</th>
<th>Density*</th>
<th>HDI ≤ 0.8</th>
<th>% African</th>
<th>% Coloured</th>
<th>% Indian</th>
<th>% White</th>
<th>Dominant Language</th>
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Source: African Transformation South Africa
2.2. An Economic Sketch

The economic challenges facing our nation – characterised most starkly by deep inequities, high levels of poverty and unemployment, and slow economic growth – largely frame the education challenge within South Africa.

Mining, manufacturing and agriculture were the largest growth areas during the industrialisation of South Africa in the first half of the century, but in recent years the finance and service sectors have grown.

The structural problems of the South African economy began to manifest themselves in the 1970s, and intensified in the 1980s. A balance of payments deficit, combined with the effects of massive state overspending, resulted in growing indebtedness and rising inflation. The apartheid state was plunged into terminal crisis by a combination of national political insurrection, a well-organised working class, the realisation of independence in Zimbabwe, Mozambique, Angola, and Namibia, international economic isolation, a dive in world gold prices, and a dramatic increase in the rate of inflation. By 1990, South Africa had a zero economic growth rate (Figure 1).

Thus, despite the wealth of South Africa relative to its neighbours, the apartheid era left an enormous legacy of poverty and inequality. South Africa has one of the highest income inequalities in the world, competing only with Brazil. Four large corporations control 88% of share capital. The poorest 53% of the population account for less than 10% of total consumption, while the richest 6% account for more than 40% of consumption. Just under half of the population (approximately 20 million people) live below the poverty line. In excess of 9 million people live in informal dwellings. Poverty is closely correlated with race, gender and a rural-urban divide. In 1998 it was estimated that 61% of the country's African population lived in poverty as compared to 1% of the country's white population. Infant mortality rates per 1 000 live births are 50 for Africans and 8 for whites. Nearly 75% of South Africa's poor live in rural areas.

Arguably the most important task of the new democratic government in 1994 was to eliminate the deep levels of poverty in the country. The Reconstruction and Development Programme (RDP) was introduced in 1994 by an alliance of organisations (the African National Congress, the Congress of South African Trade Unions and the South African Communist Party), with a wide-ranging programme of social reform to meet basic needs. The government’s macro-economic programme (the Growth, Employment and Redistribution Strategy, GEAR), based on the RDP, was articulated in 1997. Acknowledging the reality of South Africa as an emerging market in the context of globalisation, GEAR argues for fiscal discipline and debt reduction and emphasises policies of economic stabilisation to attract international capital and investments. Overall, the economic approach has been to improve the efficiency of public expenditure and to prioritise development and redistribution within fiscal constraints.

GEAR prioritises economic growth as a means to reconstruction and development, arguing that unless an annual growth of 3% is achieved, South Africa will not have the economic basis to achieve objectives such as poverty alleviation, income redistribution and employment creation. During the first years of democracy, the South African GDP growth rate increased steadily, peaking at 4.2% in 1996. Since 1996, the GDP growth rate declined to 0.5% growth in 1998 (Figure 1), recovering to approximately 2.2% currently (IMF). GDP per capita has demonstrated a mostly downward pattern over the past decade, with real GDP per capita in 1998 at a similar level to what it had been in 1970. While there are some promising signs of economic regeneration in South Africa, the extended slowdown in the South African economy has led to downward adjustments in expected growth, and has thus affected the pool of money available for social spending, although the 2000/2001 budget releases more funds for social spending than any post-1994 budget.
The difficulty of the market to create new employment opportunities, in the context of an investor-friendly policy environment, presents one of the most complex challenges for South Africa as an emerging market, negotiating the global economy. A major aim of GEAR is to generate positive employment growth, especially in the private sector. However, since 1994, South Africa has, in fact, experienced massive retrenchments in industry and a growth in unemployment amongst both school-leavers and adults. It is estimated that unemployment is currently around 33%, with figures as high as 50% to 60% in most black areas in both urban and rural settings (Statistics SA, 1998). The unemployment rates are highest for young people, with youth unemployment estimated at 53%. Unemployment also reflects the racial divide, with unemployment among whites currently estimated at 4.6% (Table 1). The reasons for the steady rise in unemployment are varied and complex. They include a decrease in the demand for unskilled labour, increased capital intensity of production, a decrease in the levels of gold production, a regulated labour market, and trade liberalisation in sectors such as clothing and textiles. Substantial budgets continue to be allocated to employment creation. The Usombomvu Fund\textsuperscript{10} was established with R855 million in 2000 to invest in young people, to develop their skills potential and invigorate job creation. The National Skills Fund provides for a 0.5% levy on the payroll of all private sector employers to finance training, development and job creation of both the employed (who receive 80% of the levy) and unemployed.

3. The Context for Education Reform

Educational reform since 1994 has seen significant moves away from the past. The process of reform has seen the articulation of new goals of access, equity, redress, quality, efficiency and democracy. These goals have guided the development of a new policy framework for the overall project of educational reform, including the development of an integrated approach to education and training based on a national qualifications framework; the restructuring of school ownership, governance and finance; the introduction of a new curriculum underpinned by outcomes-based education; the provision of compulsory basic education for all children; the establishment of new education management structures; and the restructuring of the post-compulsory further and higher education systems.

In this section we outline the existing South African education system, the challenges shaping the reform process, and the policy framework in key areas. The global realities that have challenged and shaped this reform process will be discussed in more detail in the following section.

3.1. The Structure of the Education System

Since 1994 the education system has been restructured to address the geographical, political and
economic needs of the country more effectively.

The Constitution specifies that the national and provincial spheres of government share the responsibility for framing the laws and the administrative systems of education, with the exception of the higher education sector where the national sphere has sole responsibility. The new Constitution makes provision for nine provinces, each with its own education department tasked with delivering education in accordance with national education policy.

The Department of Education co-ordinates education at the national level and is responsible for policy formulation and monitoring of implementation. Implementation of policies takes place at provincial, district and local levels. The South African Schools Act (RSA, 1996c), devolves responsibility to the school level by delegating the governance of public schools to democratically elected school governing bodies consisting of parents, educators, non-educator staff and (in secondary schools) learners.

The most efficient interpretation of the roles and responsibilities of the national and provincial levels (in the context of a shared competency) has been a matter of ongoing consideration. Since 1997 there have been calls – not only in education but in all sectors – for national government to intervene to safeguard the overall project of transformation (Intergovernmental Fiscal Review, 1999). From mid-1998, the Department of Education has been oriented toward more active intervention to safeguard key transformation initiatives such as Curriculum 2005 and district development. Fiscal federalism, national and provincial relationships, and financing responsibilities, however, continue to be important factors in shaping the role and direction of educational reform.

3.2. The South African Education System: An Overview

The South African education system accommodates more than 12.3 million learners (50.5% female), 300,000 university students (54.6% female), and 190,000 technikon students (45.5% female). The system encompasses 29,386 primary and secondary schools, 375,000 educators, 5,000 inspectors and subject advisers, and 68,000 officials, managers and support personnel (DoE: 2000b: 157-161). There are 156 technical colleges accommodating 125,000 students in technical and vocational education and training.

Formal education is categorised into three levels. The General Education and Training (GET) band incorporates a reception year and learners up to Grade 9, as well as an equivalent adult basic education qualification. The Further Education and Training (FET) band comprises Grades 10-12 in school education, out-of-school youth and adult learners. Technical, youth and community colleges, as well as a range of other industry-based and non-formal providers also fall into the FET band. The Higher Education (HE) band incorporates a range of national diplomas and certificates up to and including post-doctoral degrees. These levels are integrated within a National Qualifications Framework (NQF) provided for by the South African Qualification Authority Act (RSA, 1996b), and are illustrated in Figure 2. The NQF and SAQA are discussed in more detail in Section 4.1.3 below.
The following points provide a brief overview of the current system:

- **Early Childhood Development (ECD):** Only between 6 and 9 percent of all South African children between birth and six years have access to ECD\textsuperscript{11} facilities. Historically, public pre-primary classrooms only provided services for children in white neighbourhoods. The majority of these facilities in South Africa are private, and the sector is currently under-regulated. A process to develop a sustainable approach to provision of pre-primary (reception year) education is currently underway.

- **Access to General Education:** South Africa's school system has a relatively wide coverage. Between 1997 and 1999, total school enrolment has remained more or less static at just over 12m learners. The numbers of learners in primary schools decreased slightly during this period while secondary enrolment increased by 4%. Given that learners appear to be staying in the system longer, the ratio of primary to secondary learners is improving (Table 3).

    The net enrolment rate for primary school is over 90%, but lower for secondary school. The gross enrolment rates are much higher (105% at the primary school level and 88% at secondary school level), indicating that there are many under-aged and over-aged learners in the system (Table 4). According to the 1996 census, 12% or 1.2 million learners (between 7 and 18) were out of school.\textsuperscript{12} The out-of-school population is highest in rural areas. Access of female learners to schooling is high (51% of learners in the system).\textsuperscript{13} Concern exists over the under-enrolment in secondary schools, as it reflects both issues of school quality and limited labour market.
opportunities. New admission policies and legislation aim to achieve universal access and regularity in the progress of age cohorts through the school cycle.

Table 3: Primary and Secondary School Enrolment: 1997 to 1999

<table>
<thead>
<tr>
<th></th>
<th>Primary School Enrolment</th>
<th>Secondary School Enrolment</th>
<th>1999 Ratio: Primary : Secondary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eastern Cape</td>
<td>1 700 615</td>
<td>1 845 551</td>
<td>8%</td>
</tr>
<tr>
<td>Free State</td>
<td>494 515</td>
<td>469 623</td>
<td>-5%</td>
</tr>
<tr>
<td>Gauteng</td>
<td>830 526</td>
<td>982 616</td>
<td>9%</td>
</tr>
<tr>
<td>KwaZulu Natal</td>
<td>845 390</td>
<td>1 801 268</td>
<td>11%</td>
</tr>
<tr>
<td>Limpomtangwa</td>
<td>675 529</td>
<td>983 169</td>
<td>1%</td>
</tr>
<tr>
<td>North West</td>
<td>1 020 023</td>
<td>1 133 020</td>
<td>2%</td>
</tr>
<tr>
<td>Northern Cape</td>
<td>1 333 439</td>
<td>1 797 708</td>
<td>3%</td>
</tr>
<tr>
<td>Northern</td>
<td>809 735</td>
<td>982 250</td>
<td>1%</td>
</tr>
<tr>
<td>Western Cape</td>
<td>576 490</td>
<td>600 129</td>
<td>5%</td>
</tr>
<tr>
<td>Total</td>
<td>8 081 266</td>
<td>9 132 841</td>
<td>1%</td>
</tr>
</tbody>
</table>

Table 4: System Efficiency Indicators Across Provinces

<table>
<thead>
<tr>
<th></th>
<th>Gross Enrolment Rate %</th>
<th>Net Enrolment Rate %</th>
<th>Average Years to Complete Grade 7</th>
<th>Efficiency ratio</th>
<th>Average no of years</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Primary (6-10 yrs)</td>
<td>Secondary (11-16 yrs)</td>
<td>Primary (11-16 yrs)</td>
<td>Secondary (14-18 yrs)</td>
<td></td>
</tr>
<tr>
<td>Eastern Cape</td>
<td>114%</td>
<td>74%</td>
<td>54%</td>
<td>4%</td>
<td>1.45</td>
</tr>
<tr>
<td>Free State</td>
<td>126%</td>
<td>92%</td>
<td>50%</td>
<td>61%</td>
<td>1.20</td>
</tr>
<tr>
<td>Gauteng</td>
<td>85%</td>
<td>52%</td>
<td>87%</td>
<td>64%</td>
<td>1.36</td>
</tr>
<tr>
<td>KwaZulu Natal</td>
<td>121%</td>
<td>94%</td>
<td>100%</td>
<td>65%</td>
<td>1.25</td>
</tr>
<tr>
<td>Limpomtangwa</td>
<td>107%</td>
<td>85%</td>
<td>62%</td>
<td>61%</td>
<td>1.22</td>
</tr>
<tr>
<td>North West</td>
<td>87%</td>
<td>62%</td>
<td>75%</td>
<td>48%</td>
<td>1.21</td>
</tr>
<tr>
<td>Northern Cape</td>
<td>98%</td>
<td>75%</td>
<td>67%</td>
<td>89%</td>
<td>1.30</td>
</tr>
<tr>
<td>Northern</td>
<td>91%</td>
<td>76%</td>
<td>72%</td>
<td>48%</td>
<td>1.33</td>
</tr>
<tr>
<td>Western Cape</td>
<td>94%</td>
<td>79%</td>
<td>101%</td>
<td>81%</td>
<td>1.18</td>
</tr>
<tr>
<td>Total</td>
<td>105%</td>
<td>80%</td>
<td>81%</td>
<td>69%</td>
<td>1.28</td>
</tr>
</tbody>
</table>


Net enrolment rate: the number of appropriately aged learners who are in school as a proportion of the corresponding age group in the population expressed as a percentage.

Gross enrolment rate: the total number of learners enrolled as a proportion of the appropriate age group, expressed as a percentage.
Quality of General Education: While enrolment is extensive, the quality of outcomes of the school system is low. On average it takes 8.8 years to complete Grade 7 (Table 4), and 18 years of learner effort for one learner to reach Grade 12 (Crouch & Mabogoane, 1997). Slow flow-through rates contribute towards an estimated 15% to 20% inefficiency in the system. Senior Certificate Examination (SCE) results have been the subject of public scrutiny and criticism as the pass rates have dropped and the total number of learners with exemptions has decreased (Table 5). Nearly 50% of schools have less than a 40% pass rate. The Monitoring Learning Achievement Project (MLA), as a part of the Education for All 2000 Assessment for South Africa, has been monitoring learning achievement in Grade 4. The inter-provincial differences in Grade 4 achievements are illustrated in Figure 3. The low achievement in numeracy, literacy and life skills across the nation is of concern.

Table 5: Senior Certificate Examination Results: 1994 - 1999

<table>
<thead>
<tr>
<th>Year</th>
<th>Candidates</th>
<th>Total Passes</th>
<th>%</th>
<th>University Exemption</th>
<th>%</th>
<th>Total Failures</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1994</td>
<td>495,409</td>
<td>287,343</td>
<td>58</td>
<td>86,697</td>
<td>16</td>
<td>200,665</td>
<td>42</td>
</tr>
<tr>
<td>1995</td>
<td>531,453</td>
<td>265,742</td>
<td>50</td>
<td>76,921</td>
<td>15</td>
<td>247,711</td>
<td>47</td>
</tr>
<tr>
<td>1996</td>
<td>586,627</td>
<td>378,338</td>
<td>64</td>
<td>99,788</td>
<td>16</td>
<td>205,744</td>
<td>40</td>
</tr>
<tr>
<td>1997</td>
<td>556,260</td>
<td>265,406</td>
<td>48</td>
<td>86,067</td>
<td>16</td>
<td>203,664</td>
<td>42</td>
</tr>
<tr>
<td>1998</td>
<td>552,384</td>
<td>372,488</td>
<td>66</td>
<td>89,636</td>
<td>15</td>
<td>273,952</td>
<td>51</td>
</tr>
<tr>
<td>1999</td>
<td>511,150</td>
<td>249,831</td>
<td>49</td>
<td>63,725</td>
<td>12</td>
<td>261,328</td>
<td>51</td>
</tr>
</tbody>
</table>

Source: Compiled from EduSource Data News and Department of Education, Report on the 1999 Senior Certificate Examination, 1 November to 30 December 1999

Inequities in Education: The depth of the inequities in education left by apartheid cannot be overstated. Historical inequalities have given rise to internal inefficiencies and unequal educational outcomes. More than three years after the first democratic elections, the School Register of Needs Survey (HSRC, 1997), reflected these inequities in stark terms. While a small proportion of schools, historically serving white learners, were well-resourced schools – including resourced libraries, computer centres and scientific laboratories – the vast majority of children in South Africa continue to be educated in conditions of extreme neglect. In 1996 one in four schools had no water within walking distance, and nearly one in ten had to get their water from dams and rivers. Over half (57%) do not have electricity. Over half (52%) have pit latrines for toilets, while 13% have no ablution facilities at all. There is no learning equipment in 73% of schools, and 69% have no learning materials. Nationally, 57,499 classrooms are needed.

Figure 3: Average Task Scores for Literacy, Numeracy and Life Skills: % Grade 4 Learners by Province

Source: South Africa MLA Survey, 1999
level of library provisioning is appalling, with 72% of schools having no library collection. Approximately half of the schools in the most rural provinces have no sports facilities. Current estimates suggest that, redressing the problems outlined by the survey alone, would require an additional R3 billion per year over the next ten years (Crouch, 1996). While the overall task of addressing these inequities is daunting, progress has been made since 1994 in decreasing some of these inequities, with particular gains in electrification and water supplies. The concerted efforts to address inequities through teacher rationalisation and budget redistribution are discussed below.

**School Governance:** The South African Schools Act (RSA, 1996c) provides for local governance of schools through the formation of school governing bodies (SGBs). School governing bodies consist of the head of the school (ex officio) and representatives of the educators, learners (in secondary schools only), parents and non-academic staff of schools. School governing bodies are empowered to determine certain policies of schools, oversee the workings of schools, and make recommendations regarding staffing of their schools. They are responsible for the financial management of schools, including setting school fees and fundraising for budget shortfalls.

**Educator Quality and Professionalism:** The quality of teaching has been an important area of focus since 1994. Given the poor quality of teacher training in the past and the magnitude of change in the education sector, issues of teacher morale and professional development continue to be critical focus areas. A National Teacher Education Audit in 1994 served as the basis for several initiatives, including the development of a teachers code of conduct (SACE, 1995), norms and standards for teacher development (COTEP, 1998), and a union-led proposal for the professional development of educators (SADTU, 1998). Current regulations specify that educators must complete 80 hours of in-service training per year. Additional funding has been secured to upgrade the skills of under-qualified educators. A comprehensive skills development plan will be introduced over the next two years.

**Partners:** Central to the policy framework is the contention that a high quality education sector cannot be built by government alone, but will depend upon creative and dynamic partnerships between the public sector and civil society. Several working partnerships have been consolidated; many more continue to be built as the capacities of various sectors to contribute to educational development are better understood. The following represent important educational partners:

1. **Teacher Unions and Organisations:** The majority of educators are organised into three teacher unions. A labour relations framework has been established which encompasses both traditional areas of negotiation and issues of professional concern, including pedagogy and quality improvement strategies.

2. **Non-governmental Organisations (NGOs):** NGOs in the field of education and training provision are extremely heterogeneous. Historically organised largely within the broader social movements, they played an important role in challenging the apartheid state around issues of transformation, including issues in the field of education. Many have operated most effectively at community level. The NGO sector has undergone a massive process of reorganisation since 1994, when many of its leaders moved into the public sector and funds were increasingly channelled away from NGOs to support government more directly. The current NGO sector is emerging as an important partner in educational transformation, and is often a source of creativity and innovation in a largely rule-bound public sector. We are working with NGOs and the private sector to expand working relationships, particularly in the areas of educator training, school improvement, ABET, ECD and FET, as well as evaluation, research and monitoring.
c) **The Private Sector:** The private sector played a negligible role in the provision of basic education to the majority of South Africans before 1994. However, its role has changed significantly. It is increasingly engaging in the provision of basic education by funding FET initiatives, building schools in needy communities, and supporting the provision of teaching and learning equipment.

d) **Consolidated Partnerships:** Several partnerships have been consolidated, providing working models of educational transformation through public-private partnerships. The Joint Education Trust (JET), the READ Project, and the National Business Initiative are three examples of important working partnerships. More and more commonly, committed private sector entities will provide financial support to NGO projects prioritised by the public sector. Due to a limited fiscus, the success of key national initiatives (including the National Literacy Initiative) will largely rely on the partnerships of the private and NGO sectors. The Business Trust represents one such initiative which sees private sector funds (R500m) applied via three national NGOs to facilitate large-scale implementation of education sector policy in approximately 1 000 primary schools, 450 high schools and all 156 technical colleges.

e) **International Community:** The international community has played an important role in working with the Department of Education to contribute to educational transformation. The Department of Education co-operates with the United Nations system and with numerous development co-operation partners to improve access to basic, further and higher education. Development co-operation partners such as DANIDA, USAID, SIDA, CIDA, DFID (UK), the Netherlands, Belgium and the European Union have been instrumental in the provision of technical and sector budget assistance to the Department of Education.

3.3. **Budgetary Framework and Redress**

Government has made significant strides in reprioritising education expenditure in terms of redress and equity through prioritising social services spending, rationalising teacher deployment, and allocating provincial and school budgets on the basis of redress criteria.

Social services spending is currently estimated to constitute 61% of the national budget (excluding interest payments) and 47% of total national spending. Government commitment to social services spending has increased in both relative and absolute terms since the establishment of a democratic government. Since 1994, spending on social services has increased by approximately 12% per year. Real growth given an approximate 8% per annum inflation rate, represents an annual growth rate of 4% per annum. Increases in future grants for social services delivery, including education, will come mainly from efficiency gains (rather through an increased proportion of the fiscus). The average quarterly share of total government expenditure spent on servicing debt fluctuated between 17% and 18%.

The total education budget for 2000/2001 (Table 6) amounts to R49.8 billion – 21.9% of total government spending and 5.7% of the GDP - a relatively high share if compared with international norms. Per capita expenditure on primary education is R2 370, with wide provincial variations (for example, R3 740 in the Western Cape and R1 947 in the Eastern Cape).

In keeping with government policy to prioritise formal basic education, total expenditure on school education increased by 89% between 1991 and 1998. At the same time, however, expenditure on Adult Education, Early Childhood Education and Special Needs Education has declined due to the imperative of addressing equity in the formal schooling system.

The government has moved swiftly in the area of improving equity in education spending. Two major mechanisms have sought redress in education. The first important initiative was to increase spending...
to promote inter-provincial equity in education with the introduction of an equitable shares formula. The equitable shares formula is a mechanism to allocate provincial revenue from the national budget vote. The formula reflects several provincial variables, including the size of the school-age population and the number of learners enrolled in public ordinary schools. Over the past five years, the equitable shares formula has been developed to reflect historically accumulated backlogs more accurately, including the distribution of capital needs in education, hospital facilities, the size of the rural population in each province, and the size of the target population for social security grants weighted by a poverty index. Moves towards equity have been remarkable, with the budgets of the most rural provinces increasing by up to 30% (Table 7). This inter-provincial shift in revenue has also translated into a more equitable financial allocation at the school level, with the poorest schools benefiting most.

The Financial and Fiscal Commission’s (FFC) recommendations for 2001 will take budgetary redress further. The FFC, a constitutional body responsible for making recommendations to inform the intergovernmental policy-making process, has put forward recommendations to deepen the redress mechanisms through a costed norms approach - a formula-based method for calculating the financial resources necessary for the provision of basic social services, given population demographics and mandated norms and standards. The costed norms approach will take into account need patterns in education, health and social welfare. Importantly, the education component takes into account relative resource needs of learners, privileging the urban and rural poor.

The second mechanism to distribute the education budget to achieve redress is articulated in the Norms and Standards for School Funding (DoE, 1998a). This policy document provides a framework for allocating recurrent costs on the basis of need. Each provincial education department is required to produce a ‘resource targeting list’ informed by physical conditions, facilities and degree of crowding of the school, teacher: pupil ratios, the availability of basic services and the relative poverty of the community around the school. The main effect of the revised formula is that the poorest 40% of schools will receive 60% of the provincial schooling recurrent costs budget allocation, and the least poor 20% will get 5% of the resources.

Besides these mechanisms, a key driver of redress has been to equalise educator: learner ratios. Inequitable ratios were initially addressed through the development of national norms for the provisioning of educators to schools. However, these norms could not be implemented within provincial budgetary constraints. Currently each province sets its own targets, guided by a nationally negotiated post-provisioning model.

To date the shift in funding at the school level has predominantly been realised by an increase in the number of educators in formerly disadvantaged areas. While the equalisation of teacher: pupil ratios has been an important step towards redress, it has contributed to an increase in salary expenditure in many provinces, crowding out non-personnel expenditure such as stationary, textbooks, infrastructure upgrades and educator support and training. Personnel expenditure continues to constitute 92% of provincial budgets, although this varies from province to province. The most important consequence of this reduced expenditure is that parents are forced to make a larger financial contribution, and parents’ ability to pay influences the quality of service provided. Over time provinces are expected to reduce personnel expenditure to 85% of their provincial education budget through efficiency gains.
3.4. The Capacity of the Delivery Chain

One of the most important factors influencing educational reform is the capacity of managers and educators at all levels of the system. In 1994 new leaders capable of leading dramatic processes of organisational change, were sought from outside and within the old bureaucracy. The structure of the realigned provincial system meant that large numbers of skilled leaders were required at all levels of the system – school, district, provincial and national. In many provinces high-level managers for these new posts were hard to come by.

The 'capacity' problem must be considered from two angles – the skills, knowledge and capabilities of managers, and the deeply entrenched bureaucratic and hierarchical management practices inherited from the past.
from apartheid civil service traditions. Poor management capacity and imperfect delivery systems are perhaps the most critical challenges facing the South African education system.

Early efforts to increase management capacity only delivered limited results. This pointed to a need to combine management development with strategic restructuring of the organisational systems inherited from the past, including the systems of information management, planning, budgeting, financial management and evaluation. In 1998 we established a systematic transformation process, focusing on three phases – change management, people-centred service transformation and staff development – all rooted in the spirit of *Batho Pele* (or ‘People First’). The district level was identified as a key node of service delivery. Additional conditional funding was allocated to provinces in 1998/1999 to target projects to build provincial, district and school management capacity. These funds were used for district development projects and education management development.

The current education implementation plan, Tirisano (discussed in more detail below), places priority on building the capacity of co-operative governance in education. The plan gives support to systemic reform through the provision of technical support, central funding for specific projects, collaboration in provincial budgeting, deployment of national officials for the purpose of supporting and monitoring provincial progress, and greater accountability through regular reporting.

### 3.5. Assessment: The First Five Years

Despite the many achievements outlined above, the transformation of learning opportunities for the majority of South Africans and decisive improvement in the quality of learning attainment, have been slow to occur. In an extremely sober assessment of the status of education, Professor Sibusiso Bengu, the previous Minister of Education, made the following observations in June 1999:

- **P** Education organisation and management are integrally linked with larger state, legislative and social systems. Problems and stresses in the apparatus of the state, and malfunctions of pathologies in the society at large, all play out in the education system and interfere with delivery.

- **P** The government is engaged in reconstruction and development and fiscal stabilisation at one and the same time. Choices and trade-offs are inevitable, and many targets have been deferred. It is impossible to exaggerate the degree of inequality in our education system in terms of material conditions and professional capacity, hence the gravity of the task we are engaged in.

- **P** Education delivery has proceeded while the apparatus of the new educational administration and governance has been under construction. Things have gone badly wrong in some provinces. In particular, severe consequences have resulted from suspensions or changes in top leadership and crucial delays in appointments of key managers.

- **P** The creation of a new organisational, policy and legislative environment has run ahead of radical improvements in the material conditions of education and the quality of educational practice. International experience indicates that, even under favourable conditions, major pedagogical changes and improvements in a national system take a decade or more to institutionalise.

- **P** The Minister concludes by saying that ‘despite five years of intensive effort and commitment by tens of thousands of educators, public servants, academics and NGO practitioners, we are still far from achieving our vision for education. That is the challenge to the second democratic government. Nevertheless, the systematic changes brought about in the first five years are irrevocable, and they provide a progressive, durable basis for accelerated improvement’.
3.6. Meeting the Challenge by Working Together: TIRISANO

It is against this backdrop, and in light of the need to accelerate service delivery and enhance the accountability of the public service, that Education Minister Kader Asmal outlined his Call to Action in July 1999, designed to mobilise South Africans to build an education and training system for the 21st Century. The Call to Action has been operationalised under a plan known as Tirisano – a Sotho word meaning ‘working together.’ The choice of this word is critical. It reflects our contention that an education system of the 21st Century cannot be built by a small group of people, or even the government, working alone. It calls for a massive mobilisation of parents, learners, educators, community leaders, NGOs and the private sector, motivated by a shared vision.

In the context of the massive challenges facing the South African education system, Tirisano identifies strategic priorities. Nine priorities are identified as the basic building blocks for enabling the development of a fully functioning education and training system that will ‘drive South Africa into the 21st Century to contribute to the health and prosperity of the nation’. The nine priorities are outlined in Box 1 on the following page.

These priorities were operationalised into an implementation plan in January 2000 (DoE, 2000a). The Tirisano implementation plan streamlines the nine objectives into five core programme areas: HIV/AIDS; school effectiveness and educator professionalism; the fight against illiteracy; establishing responsive further and higher education and training systems for the 21st Century; and organisational effectiveness of national and provincial systems.

Each of these has a set of projects, clearly identified performance indicators and outcomes. Each area is led by a ‘champion’ from the national department. Current initiatives are underway to establish an approach in each of the areas of gender equity, Early Childhood Development and education for learners with special needs. The implementation plan will be adjusted to accommodate plans and priorities emerging from these processes.

This plan marks a strategic shift, placing greater emphasis on a systemic reform process over and above policy vision and goals. What is being witnessed in South Africa is a move towards greater coordination through a set of systemic reforms that underpins a more focused set of policy goals. Two major emphases in the plan stand out. On the one hand it prioritises a particular type of systemic reform through the establishment and strengthening of structures, capacity-building, filling vacant positions and improving information-gathering systems as well as analysis. On the other hand, mechanisms for measuring, appraising, evaluating and monitoring reform processes are being put in place. In general, the plan provides for greater alignment between national and provincial systems through integrated planning and budgeting systems.
4. Meeting the Global Challenge: What Does it Mean for South African Education?

In the previous sections we demonstrated the character of our post-apartheid socio-economic reconstruction and development programme – a determined effort on the part of the democratic government to redress the legacy of apartheid within enormous constraints. As we stated earlier in this paper, while a process of the internationalisation of economy and culture is not new, the qualitative and quantitative elaboration of real-time economic and cultural integration represents a new ‘moment’, a new articulation of the international arena. Our history, vision and constraints shape our response to this moment.

The government of South Africa has taken a conscious decision to actively understand the emerging form and function of globalisation, and to locate itself as a competitive economy within this international context. At the same time we have strongly affirmed our responsibility for developing a democratic nation that reflects the values of human rights and human dignity. The transformation of the post-apartheid system of education has been framed by these two imperatives – to rebuild the fibre of our nation in the context of our apartheid past, and to address the emerging challenges of the global era.

President Thabo Mbeki recently challenged leaders in the public service to engage in critical and creative reflection to arrive at a deeper and shared understanding of the ‘common universe’ characterised by ‘globalisation’. Woven into this is an acceptance that the process of globalisation brings with it challenges and opportunities, and that history – far from being ‘inevitable’ – is determined through purposeful and strategic engagement with its possibilities. The depth of our analysis will determine whether we engage with global processes in a way that reinforces or detracts from our democratic project.

In this section we reflect on our experience of reconciling the global challenges with the challenges of the post-apartheid reconstruction project in education. Some challenges of the 21st Century present opportunities of the global moment which, if approached carefully and with determination, are consistent with our post-apartheid goals of social and economic reconstruction. The policy and programme

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Box 1: The Nine Priorities of Tirisano

<table>
<thead>
<tr>
<th>Priority</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P</td>
<td>We must make our provincial systems work by making co-operative government work.</td>
</tr>
<tr>
<td>P</td>
<td>We must break the back of illiteracy among adults and youths in five years.</td>
</tr>
<tr>
<td>P</td>
<td>Schools must become centres of community life.</td>
</tr>
<tr>
<td>P</td>
<td>We must end conditions of physical degradation in South African schools.</td>
</tr>
<tr>
<td>P</td>
<td>We must develop the professional quality of our teaching force.</td>
</tr>
<tr>
<td>P</td>
<td>We must ensure the success of active learning through outcomes-based education.</td>
</tr>
<tr>
<td>P</td>
<td>We must create a vibrant further education and training system to equip youths and adults to meet the social and economic needs of the 21st Century.</td>
</tr>
<tr>
<td>P</td>
<td>We must implement a rational, seamless higher education system that grasps the intellectual and professional challenges facing South Africans in the 21st Century.</td>
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<td>We must deal urgently and purposefully with the HIV/AIDS emergency in and through the education and training system.</td>
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framework for the new education system, and our education implementation plan as reflected in Tirisano, reflect our attempt to respond to these consistent challenges. In this section we will examine these consistent challenges, as well as our vision for engaging with them to improve the lives of the people of our nation.

We will also characterise other, negative challenges emerging from globalisation that we believe run counter to our social and economic reconstruction objectives and to the needs of the poor and vulnerable beyond our borders. If left unchecked they have the capacity to undermine the best efforts of education and development in the developing world. While presenting massive challenges, we believe that with clear vision and determination, these negative tendencies can be better mediated in the interest of the world’s poor and marginalised.

4.1. Confronting Globalisation and Building a Democratic South Africa

The core mission of the Department of Education since 1994 has been to transform the national education and training system inherited from the apartheid past. This mission has been consciously framed by the imperatives of contributing towards building a democratic nation, and responding effectively to the challenges of the global era. The mission statement of the Department of Education declares that:

"Our vision is of a South Africa in which all its people have equal access to lifelong education and training opportunities, which will contribute toward improving their quality of life and building a peaceful, prosperous and democratic society."

At least two equally important principles co-exist in this statement. First, the education system must be linked to economic prosperity. If the education system is designed to improve the quality of life of South Africans, it must be designed to assist South Africans, personally and collectively, to escape the ‘poverty trap’ characterising many of our communities. Secondly, the education system must reach beyond economic goals to provide South Africans with the knowledge, values, and creative capacities to improve their lives, and to lives in a peaceful and democratic nation.

These dual imperatives have consistently framed post-1994 policy processes. As outlined in the Department of Education’s Education White Paper 3: A Programme for the Transformation of Higher Education (DoE, 1999b):

"The transformation of … education is part of the broader process of South Africa’s political, social and economic transition, which includes political democratisation, economic reconstruction and development, and redistributive social policies aimed at equity. This national agenda is being pursued within a distinctive set of pressures and demands characteristic of the late twentieth Century, often typified by globalisation. This term refers to multiple, inter-related changes in social, cultural and economic relations, linked to the widespread impact of the information and communication revolution, the growth of transnational scholarly and scientific networks, the accelerating integration of the world economy, and intense competition among nations for markets.

These economic and technological changes will necessarily have an impact on the national agenda, given the interlocking nature of global economic relations. The policy challenge is to ensure that we engage critically and creatively with the global imperatives as we determine our national and regional goals, priorities and responsibilities."
There are several challenges suggested by the new context of globalisation that we believe advance both of these missions and therefore have served to frame the transformation of the post-apartheid education system. Five of the most important of these are the challenges of: (a) providing high quality education for all; (b) transforming the curriculum; (c) establishing a system of lifelong learning, (d) strategically utilising technology in education; and (e) reconstructing and developing our society more broadly to support the achievement of educational objectives. We will briefly discuss our experience with each of these challenges.

4.1.1. Quality Education for All

Our national project and the imperatives of the new global era both emphasise the importance of providing quality education for all of our citizens.

Even more than in the industrialised era, the information society places human capacity in the centre of the circle. While access to capital and raw materials remains important, the human capacity to imagine productive and creative applications of new technologies has become at least equally important. Capacities such as literacy, numeracy, critical thinking, conceptual imagination and communication skills are central to individual and national development. Our challenge then, is not only to provide education to all, but to provide a high quality education to all.

There are two elements to this challenge – universal access and systemic quality. The right of access to education is a corner stone of the post-1994 education system. The Constitution of South Africa recognises education as an essential right. It states:

Everyone has the right –

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

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

The South African Schools Act (RSA, 1996c: 44) takes this further by making school compulsory for children between the ages of 7 and 14, and by guaranteeing learners equal access to basic and quality education without discrimination of any kind. It states that:

...No learner may be denied admission to an ordinary school on any grounds, including grounds of disability, language, learning difficulty, or pregnancy.

Post-apartheid education legislation identifies the objective of quality education as a core principle, driving educational reform. The National Education Policy Act (RSA, 1996a) includes among its concerns ‘achieving redress and enhancing quality’. The South African Schools Act of 1996 identifies quality improvement as an important role for school governing bodies. The National Qualifications Framework (NQF) provides the framework for building an integrated and quality education system to facilitate life-long learning. A systemic approach to the development of quality assurance is established through the provisions of the South African Qualifications Authority (SAQA) Act (RSA, 1995).

In 1997 the Department’s focus on quality improvement was reflected in the establishment of the Directorate: Quality Assurance. Notions of efficiency, effectiveness and standards were increasingly under discussion and certain initiatives were taken to address quality concerns directly. A campaign designed to enhance the Culture of Learning, Teaching and Service (COLTS), emphasised the improvement of physical infrastructure, the development of school management and governance capacities, and engagement with learners’ and educators’ attitudes towards learning and teaching. This
campaign has now been subsumed in the Tirisano Programme of Action.

The Department of Education has focused on the development of a national quality assurance framework, including the development of quality indicators and performance assessment tools. Currently a number of quality assurance and benchmarking mechanisms are being put in place. These include the development of a whole-school evaluation instrument, the systemic evaluation of Grades 3, 6, 9 and 12, the establishment of the Education and Training Quality Assurance Body for General and Further Education, a review of the supervisory function at district level, and the establishment of a Higher Education Quality Committee under the auspices of the Council on Higher Education. An accreditation system, which ensures that the system adheres to certain standards, is being put in place through SAQA and the NQF. Emphasis has also been placed on developing quality education management and establishing an education management information system (EMIS). All of this contributes to better diagnostic analysis of the performance of the public education system.

Improving quality through a better understanding of the processes of teaching and learning is being put on the agenda through whole-school improvement strategies in collaboration with NGOs. Understanding quality through ‘insider’ perspectives and empirical research continues to be limited, however, and sound research providing both quantitative and qualitative review continues to be a priority.

Although both national and global imperatives challenge us to define and infuse quality through the system the consideration of ‘quality’ from a global perspective must not shift our focus away from achieving the basic operational quality that provides a foundation for learning.

4.1.2. Curriculum Transformation

The post-apartheid reconstruction and development project in South Africa and the imperatives of the global environment call for a radical reconception of the very building blocks of education – what it means to learn, what it means to teach, what is meant by knowledge. The pedagogy of the apartheid education system emphasised memorisation, fact-based learning and acceptance rather than critical engagement with content. The imperatives of a democratic nation and those of the global era are radically different. Memorised facts become secondary to the ability to locate, synthesise and analyse emerging and new sources of information. Narrow technical skills become secondary to enjoyment of the process of learning. Rote memorisation becomes secondary to the application of the skills of literacy and numeracy, creativity, conceptual and lateral thinking, and critical engagement. Individual competencies become secondary to the ability to work constructively in the context of groups. In an increasingly complex world, the emotional and social ‘skills of life’ move more centrally into the education domain.

Our effort to transform the curriculum has been perhaps our most far-reaching project since 1994. This process is at the heart of our efforts to reconcile national democratic and global imperatives. Deeply integrated in this project is the process of redefining ‘quality’ in the context of the new century.

Launched in March 1997, the new curriculum framework – Curriculum 2005 – reconceptualises the nature of learning and teaching through the adoption of an outcomes-based system. In contrast to the traditional ‘content-based’ methods of learning and teaching, Curriculum 2005 seeks to place the emphasis on what learners should know and be able to do at the end of a course of learning and teaching.

The definition of ‘quality’ that underpins Curriculum 2005 was framed by three overlapping traditions or philosophies:

A learner-centred framework encompasses several principles including an egalitarian political mission, a thrust towards anti-rote learning and critical thinking, and group work rather than directive teaching.
An outcomes-based approach emphasises the outcomes of education, with minimal prescription of inputs of what should be taught or how it should be taught.

The integration of knowledge integrates information, attitudes, skills and knowledge (across disciplines) within a holistic approach to learning and development.

For general basic education, the traditional content-based subjects of the first ten years of schooling have been reorganised into eight learning areas: Language, Literacy and Communication; Mathematical Literacy, Mathematics and Mathematical Sciences; Human and Social Sciences; Technology; Natural Sciences; Economic and Management Sciences; Arts and Culture; and Life Orientation. These learning areas are aimed at allowing students to acquire an understanding of and ability to function in larger political, social and economic contexts. Importantly, social goals of national reconstruction and the goal of preparing learners for the new global context are integrated into all learning areas. For example, Life Orientation is described as ‘fundamental in empowering learners to live meaningful lives in a society that demands rapid transformation.’ Mathematical Literacy, Mathematics and Mathematical Sciences are rooted in the increasing global importance of mathematical fluency, but at the same time motivated to ‘empower people to work towards the reconstruction and development of South African society’.

Phenomenal challenges are implied by this change. Educators are considered facilitators of knowledge rather than providers of knowledge. Knowledge is considered to be best formulated in the context of engagement and group work. A Curriculum Review Team, appointed by the Minister of Education, has identified several improvements to be made in the design, streamlining and implementation of Curriculum 2005. While acknowledging this need for improvement, Curriculum 2005 represents our most important vehicle for preparing young people for the 21st century. A Grade 3 educator recently described the difference between her class this year (a class having entered the Curriculum 2005 stream from Grade 1) and those of previous years. She sighed as she said, ‘These children, they like to talk. They like to ask questions. Every time we do something, all of them have an idea to share. Really, it is more tiring!’ If we have nurtured a more inquisitive and confident learner in our first few years, then, despite the challenges, there is much to be celebrated.

Much of the criticism of Curriculum 2005 has been regarding its implementation. The new curriculum is said by some to be beyond the skills and experiences of educators. In the context of limited resources for iterative training, the curriculum has led to some confusion and even some discouragement in some places. This is a warning to those of us trying to straddle the needs of a developing nation and the challenges of the global era. While it is relatively simple to envision ways in which the education system can address emerging goals, it remains important to focus on the practical steps needed to shift an under-performing system to a performing system.
4.1.3. A National System of Life-Long Learning

One of the most commonly cited educational challenges of the 21st Century, is the need for an education system that facilitates a process of life-long learning. The White Paper on Education and Training (DoE, 1995: 21):

The overarching goal of policy must be to enable all individuals to value, have access to, and succeed in lifelong education and training of good quality. Educational and management processes must therefore put the learners first, recognising and building on their knowledge and experience, and responding to their needs. An integrated approach to education and training will increase access, mobility and quality in the national learning system.

The system must increasingly open access to education and training opportunities of good quality to all children, youths and adults. The Constitution guarantees equal access to basic education for all. The satisfaction of this guarantee must be the basis of policy. It goes well beyond the provision of schooling. It must provide an increasing range of learning possibilities, offering learners greater flexibility in choosing what, where, when, how and at what pace they learn.

There must be special emphasis on the redress of educational inequalities among those sections of our people who have suffered particular disadvantages, or who are especially vulnerable, including street children, out-of-school youths, the disabled and citizens with special educational needs.

Education policy has attempted to create a seamless system of education provision including early childhood education (ECD), general education and training (GET), adult education and training (ABET), further education and training (FET), and higher education (HE). This integrated system is now being created through a National Qualifications Framework (NQF) to enable national recognition of acquired skills and knowledge, thereby encouraging life-long learning (SAQA, 2000: 3).

The origins of the NQF can be traced back to several years before the recent global discourse on life-long learning. From the early 1970s, trade union demands in South Africa for a living wage were repeatedly rejected by employers on the grounds that workers were unskilled. Yet, the training offered was narrowly task-oriented and devoid of underpinning knowledge, rendering the training obsolete when changes occurred in production processes. Workers and shop stewards began to see issues of training and skills recognition as a means of achieving demands for better working conditions. In the late 1980s, one of the most powerful trade unions of the democratic movement, the National Union of Metalworkers of South Africa (NUMSA), established a research group, comprising workers and union officials to formulate recommendations on training. An integrated proposal, based on a staged system of skill improvement and linked to grading increments, was put forward. The proposal stressed the need, not only for basic education, but also for portability and national recognition of training to facilitate worker stability and mobility.

Post-1994 education policy laid the foundation for the development of the NQF. The White Paper on Education and Training (DoE, 1995: 15) states:

Successful modern economies and societies require the elimination of artificial hierarchies, in social organisation, in the organisation and management of work, and in the way in which learning is organised and certified. They require citizens with a strong foundation of general education, the desire and ability to continue to learn, to adapt to and develop new knowledge, skills and technologies, to move flexibly between occupations, to take responsibility for personal performance, to set and achieve high standards, and to work co-operatively.
In October 1995, the South African Qualifications Authority Act was passed into law. The South African Qualifications Authority (SAQA), responsible for overseeing the establishment of the NQF, was established in 1996. The role of SAQA is to establish standards, quality assurance systems and management information systems to support the accessibility and quality of learning within the NQF. The objectives of the NQF are to:

- create an integrated national framework for learning achievements;
- facilitate access to, and mobility and progression within education, training and career paths;
- enhance the quality of education and training;
- accelerate the redress of past unfair discrimination in education, training and employment opportunities;
- contribute to the full personal development of each learner and the social and economic development of the nation at large.

The NQF is designed to integrate an outcomes-based approach to learning through all tiers of the education system. SAQA is tasked with ensuring that standards and qualifications registered on the NQF are internationally comparable. Since the global trend is moving towards describing qualifications in terms of achieved learning outcomes, articulation of South African qualifications with their international counterparts is facilitated through articulation of learning outcomes.

Importantly, the system requires the registration and accreditation of all education providers, private and public, mitigating against the widening gap in quality service provision growing in the context of the international trade liberalisation in education.

We are still in the throes of establishing the system and making it come to life in practice. A conservative interpretation of it merely emphasises the economic benefits to be gained from an educated population. A progressive perspective also includes seeing it as an enabling, democratic and holistic approach to meeting human needs. In the field of adult literacy work, this dichotomy is played out in polarised conceptions of workplace ABET for skills development versus community-based adult education for social justice. There is increasing support for our approach, which recognises the inter-relatedness of society and the economy.

There are several complexities to the approach, however. An emphasis on pre-set standards runs the risk of blocking the emergence of innovative developments. An over-bureaucratisation may alienate creative educators from the system. An overemphasis on outcomes may compromise the important pedagogical elements found in inputs and processes. In a rapidly changing world, the ongoing challenge will be to ensure that the system becomes a facilitator of learning rather than a process that serves to bureaucratise knowledge. We hope that, by being aware of these dangers, we can mitigate the more negative tendencies and build a dynamic and flexible system of life-long learning for our nation.

### 4.1.4. Strategic Utilisation of Technology

In the last few sections we have tried to outline the ways in which the core structure and philosophy of our education system have been driven by the challenges of globalisation and by the challenges of our national democratic project. A commitment to quality education for all within a system of life-long learning, combined with a complete transformation of our curriculum philosophy, and informed by local and global changes, are corner-stones of the new education system.
Many associate globalisation with the phenomenal speed and scope of technological innovation over the past two decades. In this section we reflect on our experience of integrating information and communication technology (ICT) into education.

Technology as such does not solve social problems. However, the availability and use of ICT is increasingly a pre-requisite for economic and social development. The question for countries on the scarce side of the ‘digital divide’ is how to strategically place and utilise ICTs to enhance local social and economic aims. Our experience demonstrates the complexity of this challenge.

Most importantly, we have found it critical to continually reflect on the question, who is driving whom? The level of education in general, and of technical education in particular, is essential for the design and productive use of new technologies.

It has proven important, over and over again in our experience, to ensure that content, application, and human ability drive technological decisions – not the other way round. Thus, a computer becomes less important than the ways in which a computer can support our objective to develop an application for a local priority, such as the development of the small and medium micro-enterprise sector. Technological centres, developed in the absence of creative or practical applications, or divorced from building the human capacity to utilise technology to improve the local quality of life, at best become a wasted investment and, at worst, can serve to undermine other development processes. In 1995, the Technology Enhanced Learning Investigation (TELI), commissioned by the Department of Education, located technology as a means to improve education and not as an end in itself.

Policy in South Africa has moved a long way towards promoting and understanding the role of ICTs in society in general and in education in particular (DoE, 2000h: 54). Beyond coverage, delivery and regulation of ICT infrastructure, national education has focused on three key areas: (a) a growing emphasis on mathematics, science and technology; (b) educational broadcasting; and (c) the use of ICTs in schools.

**An Emphasis on Mathematics, Science and Technology**

We have placed a growing emphasis on the importance of mathematics, science and technology. At least two studies, comparing the performance of South African learners with that of learners from other nations, suggest that South African learners rate low in mathematics and science, even in comparison with other developing nations (HSRC, 1999; DoE, 1999a). The importance of mathematics, science and technology is a core value within the process of transforming the curriculum. Three of the eight learning areas of Curriculum 2005 are dedicated to mathematics, science and technology. An important component of Curriculum 2005 is the Technology 2005 project, initiated jointly by the Department of Education and the Department of Arts, Culture, Science and Technology. This project was established to design and develop a technology-oriented curriculum at the school level, to train teachers, and to design strategies to increase the numbers of mathematics, science, and technology graduates, particularly among black learners. Its work has been incorporated into curriculum and transformation processes at the provincial level. SYSTEM (Students and Youth into Science, Technology, Engineering and Mathematics) is another critical programme in this area. It is a ‘second chance’ programme for senior certificate candidates who have under-performed in science subjects, as well as a programme to upgrade and recruit mathematics, science, and technology educators. The experience gained from this programme has contributed to the development of a broader science, technology and mathematics strategy.

The national curriculum framework for Further Education and Training includes Mathematical Literacy as an essential component. Mathematical literacy is also a fundamental learning category forming up a qualification for SAQA.
Utilising the Public Broadcasting System

In 1998 the total size of the South African broadcasting market was estimated at six billion rand, with future growth estimates ranging between 15% and 18%. Television usage was estimated to be over 50%, although usage was lowest amongst the African population (Gillwald, 2000:5). The technology that reaches the broadest population continues to be radio.

There has been a rich dialogue within South Africa about how to ensure that the broadcasting industry serves the post-apartheid reconstruction and development project. The Independent Broadcasting Authority (IBA) was established in 1993 as an independent statutory body responsible for the regulation of the South African broadcasting industry. Last year the authority proposed that material containing gratuitous violence, violence against women and hate speech be prohibited from any form of broadcast. The proposed new code of conduct also set aside a time slot for other material meant for adult audiences. This code of conduct is still under consideration (SAIRR, 2000: 347).

The Department has begun to harness the broadcasting industry (radio, television, print materials) to support school education as well as for general public education. An educational broadcasting plan was completed in 1996, which provided the basis for the development of a successful partnership with the South African Broadcasting Corporation (SABC). Educational radio and television programmes, supporting all sectors of education, have been developed and broadcast. Special innovative programming to target key areas have been conceptualised, developed and broadcast. This programming includes Take 5, School TV, Yizo Yizo, Educator Express, Soul City and Soul Buddyz. Print support materials for educators, and a course for training educators to use multi-media in the classroom, have reinforced these programming initiatives. A South African version of the Sesame Street educational series (Takalani Sesame), produced by the Children’s Television Workshop on behalf of the Department of Education and the South African Broadcasting Corporation, began broadcasting in August this year. Over the past year we initiated a feasibility study with the Department of Communications to consider the viability of a dedicated educational channel or broadcasting service.

The study recommended building a ‘nested’ education broadcasting service across all broadcasting providers, including strengthening educational programming requirements for all broadcasting providers. The emphasis of this joint initiative has shifted towards drafting up an implementation plan for the nested educational service. This allows the education system to harness most effectively the educational potential of both radio and television in support of a wide range of formal and informal education programming.

Innovative approaches to public-private partnerships in the broadcasting industry are emerging. The licensing fees paid by private broadcasting channels underwrite some of the costs of public broadcasting and educational programming. The effective use of broadcasting for educational purposes will continue to rely on innovative public-private partnerships.

ICTs in Schools

The Centre for Educational Technology and Distant Education (CETDE) within the Department of Education started functioning in 1996. It undertakes research and development work on technology-enhanced learning, school libraries, educational broadcasting and distance education. A research report on technology-enhanced learning (TEL) provided the basis for a draft policy and strategic implementation plan in this area. Consultations with the Department of Communications are expected to lead to a formal agreement on the establishment of a national technology backbone connecting all schools to the Internet, and an Education Intranet (School Net South Africa) to serve the education and training system. This network will provide a mechanism for the distribution of digital learning and support materials. At a national level, the library sector has identified the importance of ICTs. The ICT debate in the library sector has challenged librarians to reinforce their role as educators and facilitators of knowledge. An audit of school libraries is currently being undertaken which will lead to an ICT library implementation plan.
The use of ICTs to enhance learning and teaching within schools has been uneven, largely reflecting historical legacies and recent developments in school funding policies. In a context where only 50% of schools have an adequate supply of textbooks, and only 17% of schools have any form of library, ICTs are largely purchased with funds raised from parents.

A recent survey of ICT in South African schools (DoE, 2000g: 157) suggests that approximately 13% of schools in South Africa have one or more computers, 89% of schools with one or more computers are urban based, and 76% of schools with no computers are rural based. Of the schools with computers, a substantial proportion have over ten computers (44%) or over thirty computers (38%), indicating ‘computer lab’ type facilities. There are large discrepancies between the type of computers, with some schools accessing a high number of Pentiums (up to 60) and others dominated by older machines (some older than 486s). Of the 13% of schools that have computers, the most important source of ICT funding (including maintenance) was school fees and school fundraising. Among these schools, only 20% indicated that they would use school funds to subsidise ICT training for educators. Only a small proportion of schools with computers have attained high levels of usage. High levels of usage correlated with low learner educator ratios, and the sophistication and number of computers available.

Generally, schools that do not have computers also lack complementary technologies (such as tape recorders, radios, TVs and VCRs). The most important factors preventing schools from acquiring computers are an absence of electricity (28%), lack of funding (22%), insufficient building space (14%), lack of available staff (13%), and poor security (6%). Private sector initiatives to assist schools without computers have been marginal; only 13% of schools, mainly in urban areas, have experienced any overtures, as yet unfulfilled, in this regard.

Thus, the provisioning of ICTs to schools has been largely relegated to the market. The patterns of provisioning have served to entrench (and even widen) quality discrepancies between schools, reflecting the socio-economic context of parents. In a context where minimum basic materials are inadequately supplied, access to ICTs in schools is largely relegated to private or better-resourced public schools. The impact of ICTs in schools has been uneven, with worrisome trends concerning educator capacity and training, as well as limited applications.

One of the most important questions emerging from this experience is how governments should manage the widening gap between public and private schools in ICT provisioning. Creative and purposeful solutions must be found. Currently one promising strategy is an effort to link broadcasting and cellular licence negotiations to the social obligations of these enterprises.

**Conclusion**

There is general consensus among those who write about ICTs in developing countries that the strategic use of technology has to be guided by a policy and a strategic framework. The interests of dominant economies and transnational corporations exporting ICTs and ICT peripherals lie squarely in the massive use (or misuse) of ICT in the developing world. Without a clear plan, developing nations run the risk of diverting massive resources to ICTs without realising any gains.

The South African experience has highlighted the importance of human processes and development in guiding technological development. We have been forced to balance investment in technology in the face of more basic educational provisioning and social demands, and to dismiss the simplistic technocratic discourse which implies that investment in ICTs can somehow supersede more basic social demands. We are continually forced to find innovative mechanisms to ensure that technologies service our broad education project and to prevent further divisions through unequal access. Acknowledging these difficulties, we have remained steadfast and determined to ensure that young South Africans have the skills and confidence to engage in the technological developments of the 21st Century.
4.1.5. The Developmental State

My Government’s commitment to create a people-centred society of liberty binds us to the pursuit of the goals of freedom from want, freedom from hunger, freedom from deprivation, freedom from ignorance, freedom from suppression and freedom from fear. These freedoms are fundamental to the guarantee of human dignity. They will therefore constitute part of the centre-piece of what this Government will seek to achieve, the focal point on which our attention will be continuously focused. (Nelson Mandela in his Inaugural Address as first President of a democratic South Africa to a Joint Sitting of Parliament, 24 May 1994).

While globalisation has been associated with the demise of the welfare and the developing state, we believe that developing nations in particular, if committed to principles of equity and human rights, must contest this trajectory. Since 1994 the South African government has affirmed the responsibility of the state to build a society that protects the well-being of all its citizens.

The social developmental role of the state becomes increasingly important in the global age, particularly for developing nations, for at least three overlapping reasons. First, without social development, there will be no productive growth in the developing world. A sense of liberty, family safety and social solidarity are all requirements for productive innovation. Secondly, without an interventionist state, set on providing social scaffolding for human survival and expression, we will arrive at a day of historically unmatched human misery in the developing world. Left to its own devices, the emerging global system appears to have a profound capacity to exclude. (This is discussed in more detail below.) In this context, access to safety, health, shelter, nutrition and emergency care becomes crucial to ensure the basic well-being of all people. Thirdly, the success of the education system is highly dependent upon the social fabric of its surrounding. A school servicing a community in which children are hungry, unsafe, worried, or ill, has a much more daunting educational challenge than a school servicing a community where basic needs, including shelter, health care and safety are ensured.

The White Paper on Reconstruction and Development (1995) provided an early framework for the South African government’s commitment to social development. The Reconstruction and Development Programme (RDP) was an integrated socio-economic policy framework seeking to mobilise all of our people and resources toward the building of a democratic, non-racial and non-sexist future. Elaborated through subsequent policy processes, the RDP represents the core of the new government’s self-conception. It represents a vision for the fundamental transformation of South Africa to create a people-centred society that measures progress by the extent to which it has succeeded in securing liberty, prosperity and happiness for each citizen.

While bound by enormous constraints, the South African government remains fully committed to national reconstruction and development, driven by the principles of equity and redress. It is social and economic reconstruction, in its widest sense, which will ultimately provide the basis upon which a solid education system can grow. A range of social initiatives in welfare, health, social crime prevention and housing, among others, provides especially important support to education. The articulation of integrated urban and rural renewal strategies facilitates intensive governmental co-operation in social and economic development among impoverished communities. A primary school nutrition programme, free primary health care, social and disability grants, land restitution, water provisioning and low income housing projects are some of the most important projects strengthening the basis for an effective education sector.

4.2. Negative Tendencies of Globalisation: Threats to Democratic Education

While there are several challenges woven into the global era that we can optimistically embrace (reviewed in the section above), there are other challenges of the emerging global environment – both explicit and implicit – which we believe are less positive. This conference of Commonwealth Education
Ministers presents an important opportunity to share reflections on the negative tendencies of the global system. If left unchecked, these tendencies have the capacity to undermine the best efforts of education and development, especially in the developing world. With a common approach to some of these concerns, nations of the Commonwealth may be able to shift the trajectory of the global system away from such negative consequences.

In this section we attempt to analyse three of the more worrisome tendencies of the emerging global environment. We will first discuss the growing tendency to commodify education and reduce its importance to narrow market effects. We will then consider the homogenising effect of globalisation on values, culture and conceptions of knowledge. Finally we will consider the political economy of globalisation and its effect on education development.

4.2.1. Human Capital, Commodification and Privatisation

South African educational reform has embraced the principle that the education system is an important forum for developing South Africans for social and economic participation. However, there is a growing ‘human capital’ discourse which implies that the quality of an education system can be measured exclusively in economic terms, and especially in terms of its efficiency in responding to market needs. According to the human capital explanation of education and national development, education becomes purely instrumental to economic production and growth. In its extreme form, education is seen in terms of an economic investment, in which students and workers become ‘clients’ or ‘value-added products’ and a means by which the economy is to be improved.

There are several implicit dangers of this discourse in our context. First, the analysis implies that a national education system of high quality can be measured by its ability to develop a highly skilled and flexible labour force, even if divorced from larger goals of social justice and cultural confidence. The mission of building a democratic nation, however, implies social and individual competencies that transcend current market needs. It implies reasserting South Africans as citizens of the South African nation, not as ‘clients’ of the Department of Education.

Secondly, the analysis overly simplifies the relationship between a system of education and economic growth. The education and training process is posed as a panacea for economic performance, linking investment in human capital and technology with automatic increases in productive economic growth. The discourse implies that problems of unemployment are most importantly a reflection of individual deficiencies, instead of an intrinsic weakness of the economic structure. The experience of Sri Lanka, for example, where high levels of educational investment and educational outcomes did not translate into commensurate economic growth, is an important reminder of the complexity of the relationship. Education cannot secure economic development on its own. The point is not to deny the responsibility of education to contribute towards developing citizens for economic participation, but rather to ensure that the complexity of the political economy of job creation and capital distribution in the new era is not overly simplified.

Closely related to the growth of a narrow human capital view of education, is the growing commodification of education, with the corresponding pressures of privatisation. In South Africa this has been powerfully demonstrated in the arena of further education and training, as well as higher education.

Prior to 1998, there was a policy vacuum in the arena of accreditation in further and higher education. An enormous range of private providers had entered the ‘market’, with no standards for quality nor mechanisms to ensure accountability to their ‘clients’. The providers ranged from serious initiatives to fly-by-night scams. Some were motivated by educational objectives, others by profit margins alone. The majority operated in niche areas such as information technology, management, and commerce. Foreign institutions, particularly from the UK and Australia, entered South Africa in large numbers.
The situation was further complicated by an increase in public-private partnerships. Regrettably, many of these associations were not partnerships in the true sense of the word, but ‘marriages of convenience.’ Many overseas institutions used the infrastructure of local public institutions as a base for offering their qualifications in targeted academic programmes such as an MBA. In practice these relationships contribute little to the development of the teaching or research capacity of the local partner. A number of public institutions have, in the name of efficiency, outsourced the delivery of some of their academic programmes (especially distance learning programmes) to private sector partners. In our experience, these collaborations often result in a compromise of quality; the students who are short-changed are in the main black and poor. As a result we have placed a moratorium on these partnerships in the higher education sector until we can better understand their impact and the regulatory framework required.

Our experience has suggested that the management of relationships with overseas institutions – whether in further or higher education – is particularly complicated in this era. While there are examples of constructive relationships, South Africa, and indeed other countries in the south simply represent new markets. There is scant concern for development agendas, or even concern to promote the traditional values associated with further and higher education. Put bluntly, education becomes commodified, transformed into a service to be bought and sold.

The unregulated growth of transnational universities can have serious additional consequences for the future of the higher education system in our country. Our concerns have become wide-ranging. Our best academics leave the public institutions that nurtured them for more prestigious and lucrative global universities. Furthermore, transnational institutions, in the main, concentrate on lucrative fields of study, especially the areas of ICT, business and commerce. Unlike public institutions, there is no need to cross-subsidise costly areas such as engineering and health, or disciplines of cultural and social importance. Finally there is little regard for national social agendas.

While the impact of the commodification of education has been particularly acute in the transformation of further and higher education, it can also be seen in other arenas of education, if for slightly different reasons. In order to retain middle class learners in the public education system, government subsidies to schools can be supplemented by locally determined school fees and fundraising efforts. In practice this system has contributed towards the differentiation of access to quality on the basis of ‘purchasing power’, and a highly differentiated public schooling sector. While this decision represents our best reconciliation between the aims of equity and quality in the context of budgetary constraints, there is a growing tendency in the global discourse to elevate the charging of school fees from a necessary tactic to a principle, whereby ‘clients’ (parents and learners) have the ‘right’ to ‘choose’ (through purchasing power) the highest quality ‘commodity’ or ‘service’ (school) they can afford (or are willing to pay for). We have addressed these tendencies by privileging schools in poorer and more rural contexts through weighted budgetary distribution systems. We will continue to find creative ways to identify and address the ways in which economic pressures can lead to growing divisions in the education system.

While we are managing the international pressure towards the commodification of education through several initiatives, we regard the development with concern. We believe that the meeting of the Ministers of Education of the Commonwealth presents an important opportunity to affirm the importance of education as a vehicle for nation-building and as a human right, beyond the economic contributions that it must achieve.

4.2.2. Culture, Values, Knowledge and Information

The effect of (the) cultural bomb (dropped by imperialism), is to annihilate a people’s belief in their names, their languages, their environment, in their heritage of struggle, in their unity, in their capacities, and ultimately in themselves. It makes them see their past as one wasteland of non-achievement and it makes them want to distance themselves from that wasteland. It makes them want to identify with that which is furthest removed from themselves; for instance, with other people’s languages rather than their own… (Ngugi Wa Thiong’o (1986). Decolonising the Mind.24)
While globalisation is often discussed along economic and technological axes, its cultural consequences present some of the most profound challenges to the achievement of a peaceful and democratic South Africa.

During a recent visit to South Africa, Manuel Castells (2000) highlighted the undeniable tendency of globalisation to polarise social structures. The flexibility of the global economy does not purport to link-up everybody from everywhere, but rather link-up ‘everything that is valuable according to dominant values and interests, while disconnecting everything that is not valuable, or becomes devalued.’ The dominant values of globalisation are the value-engines of global capitalism, namely materialism, individuality and competition. Aggressive constructs of masculinity are closely woven into this fabric.

In the urban areas, where access to symbols and commodities of the global era are pervasive (through television and other forms of mass media), individuals are increasingly polarised along these lines. In their most simple form, these divisions mimic traditional class divisions. However, the commodified and competitive aspect of class divisions becomes exaggerated. Access to material commodities, over and above relations to production and knowledge, becomes the driving force of cultural identity.

We see this in a rising materialism within our youth culture. While there are many young South Africans who rise above the commercial storm, few would argue that urban youth culture is not dominated by a hyper-consciousness in relationship to material possessions and symbols of global power. Recent sociological research into the basis of violence among young people in South Africa suggests that young people, particularly in communities characterised by inequities and in the context of fragmented families, allocate an inflated sense of personal power to material symbols (Segel & Pelo, 1999; Wood & Jewkes, 1998). Identity, self-worth, and even the capacity to be ‘loved’ are gauged on the basis of material access to Nike shoes or taking your girlfriend to McDonalds. The value system does not impact only young people, with an increasing tendency among even the professional class to equate the ‘value’ of a person with the quality of his/her car.

Symbols and messages propelling this new set of values are pervasive. The individualism, commercialism and competition have powerful consequences on local culture and national values alike. They propel a divisive, even polarised social fabric whereby either an individual has ‘made it’ (in material terms) or has not. They work against the national project of unity and respect, as people are judged by their external trappings rather than their inner character or humanity. They undermine a sense of local meaning and pride, as images of success and beauty are sought overseas. Values that once rooted community development, such as respect for elders, are eroded.

Engagement with an external set of values is most productive if counterbalanced by an alternative set of local values. Local values allow for a critical engagement with an external set of values, adopting what is helpful, and challenging what is considered to be destructive or without substance. The vehicle for local values in South Africa has historically been the extended family and community unit (in their various forms). While local culture in South Africa is thriving in many communities, there are many urban neighbourhoods where both the extended family and sense of community have been broken down as a result of apartheid policies, as well as rapid urbanisation and economic dislocation.

Young urban South Africans appear to be particularly susceptible to this ‘global’ and homogenised culture. The history of urban development in South Africa appears to exaggerate an openness, even a vulnerability, to a commercialised culture among young people. The inequities of South Africa are within walking distance for most young South Africans. The wealth of Sandton mimics the Hollywood set of the Bold and the Beautiful, an American soap opera capturing the imaginations of huge numbers of South Africans. This wealth neighbours Alexandra, an urban township containing some of the deepest urban poverty in South Africa.

One of the most insidious ways in which the homogenising culture of globalisation infiltrates local culture is through its definition of ‘time.’ A particular conception of time has been central to our local framework
for wisdom, relationships, respect and reflection. A complete ritual of greeting, silence at times of mourning and a consensus-building process of *makgotla* (community meetings) have rooted social solidarity and social governance. The infiltration of the ‘time is money’ culture threatens to uproot these important foundations of social relationships, particularly in urban areas.

Two remaining dangers are important to our education project – issues of language and the epistemology of knowledge. The global world is dominated by English as a medium of communication. There is a discourse of ‘inefficiency’ with regards to multi-lingualism. Given the importance of language with reference to cultural development, a monolingual global economy threatens the cultural wealth of our nation.

Finally, in a world increasingly referred to as a ‘knowledge society’, the question of epistemology of knowledge becomes crucial to the future of education in the developing world. The tendency of globalisation is to define useful knowledge and information in market terms. The ‘knowledge’ in the ‘information economy’ is, to a great degree, western-based and ‘Americanised.’ In this context, affirming the importance of local knowledge generation (both formal and informal) becomes critical. As part of this challenge, developing nations must affirm space for research and intellectual pursuits beyond those dictated by international interests.

### 4.2.3. The Political Economy of Globalisation

The educational challenge of the emerging global environment cannot be separated from larger political and economic challenges.

An aspect of great concern in the emerging global economy is its proclivity to economic polarisation. Respected analysts consistently warn of the tendency of globalisation to affirm historical global inequities and to further polarise economic access and wealth.

The tendency to polarise occurs at international, national, sub-national and individual levels. The global economy is structured to affirm historical economic polarisation between nations and regions of the world. Nations deemed ‘less fit’ by the new global logic are faced with a future of economic exclusion and increased social despair. On an individual level, there is a tendency for the information economy to favour a small elite (those able to constantly retrain and ‘learn how to learn’), leaving behind the majority of the working class and the growing numbers deemed ‘without worth’ according to the new global logic.

This trajectory is worrisome on several counts. It directly impacts on our education project. Without national economic growth, developing nations will be unable to increase expenditure in education in real terms without moving into further debt. Without meaningful and mass job creation, even the best education will fail to improve the quality of life. The structure threatens to pit developing and emerging nations against each other in a fight for ‘left-overs’. This trajectory, if left unchecked, threatens not only our efforts to build a more equitable nation, but jeopardises social development projects across the developing world.

Beyond the massive challenge of economic polarisation, two additional challenges to the education project in the developing world are worth highlighting – job creation and labour mobility. Dr John Hall, an analyst at the University of Cape Town, has warned that not only does the digital divide in Africa mimic earlier discriminatory patterns of colonialism, but new technologies may be widening social divisions through the extensive automation of service industries. He cites the example of Nedcor, a major financial services conglomerate in South Africa. Nedcor has reduced its operating costs by 25% over the last three years through automated operating and customer services, thus absorbing the consequences of the ‘white flight’ without the necessity for training skilled black professionals. Job losses have also been the result of liberalisation of trade, particularly in the clothing and textiles industries. Low profit margins from the mining, manufacturing and agricultural sectors threaten more job losses in the traditional staples of our economy. Although a growth of 270 000 new jobs was predicted
last year, statistics showed a loss of 71 000 jobs and a net gain of only 54 000 jobs. Job losses resulting from automation, trade liberalisation and the price structure of raw material exports have not been offset by job growth elsewhere in the economy, as capital flows have been mainly in the form of short-term capital.

Finally, the goals of education are impeded by the global organisation of jobs, and particularly by the high labour mobility among highly skilled professionals of the developing world. It would simply be wrong to conclude that South Africa and other emerging and developing nations have not produced high calibre professionals who have become part of the innovation corps of the global era. Silicon Valley, the most advanced ICT producing region of the world, survives by recruiting thousands of engineers, managers and scientists from across the world – including South Africa. Britain is a massive importer of doctors, nurses and dentists from South Africa. The realities of those economies run counter to maintaining these people for local projects in the countries that developed their professional capacities. The issues of political economy, raised by the current face of globalisation, present massive challenges to the integrity and success of the educational project of South Africa, and for nations sharing similar contexts.

4.3. Conclusion

If the next Century is going to be characterised as an African Century for the social and economic progress of the African people, the Century of durable peace and sustained development in Africa, then the success of this project is dependent on the success of our education systems. For nowhere in the world has sustained development been attained without a well-functioning system of education, without universal and sound primary education, without an effective higher education and research sector, without equality of educational opportunity.

The enormity of the task at hand is magnified when we consider the legacy of colonial education, the long-term effects of the domination of African peoples, both through brute force and thought control, through divorcing the African child from his or her own experiences and environment, through systematic processes of alienation and also assimilation, in this way bringing about what Ngugi aptly describes as the ‘domination of the mental universe of the colonised’.

Nevertheless, the resilient struggle of our movements for African liberation produced a common vision of African unity and development, of an end to the marginalisation of our continent in world progress and development….Thus, the co-operation of the nation states, of government education departments are required, for the overall basis on which we must move forward together as governments, as entrepreneurs, as academics, must be through partnerships based on our shared vision and goals for a better life for all, and not as competitors for wealth, monopoly or power (President Thabo Mbeki, addressing the Biennial Meeting of the Association for the Development of Education in Africa).

In the above two sections we have reflected on the opportunities and challenges emerging in the 21st Century.

Some of the challenges of the new century support the project to build a post-apartheid democratic South Africa. As we move away from a history of domination into the new century, we must build a high quality education system accessible to all; we must build a dynamic system that facilitates lifelong learning; we must recreate curricular content and methods; we must use technology with a vision; and we must build the economic and social fibre of our nation to stabilise the ground upon which a proud nation stands. While the constraints are arguably still massive, the progress made in the first six years of democracy gives us reason to remain determined in our resolve.

In the course of our experience thus far, we have come to understand the importance of clear vision and direction. The developmental possibilities of the new century contain dangers if they are not mediated carefully. If not managed, the definition of ‘quality’ could be dictated by the market. If not mediated, curriculum reform and a system of lifelong learning could fail to address the knowledge and abilities that allow a nation to develop a creative and democratic future. If not guided, ICT could widen inequities and weaken, rather than harness, local innovation.
While embracing the positive challenges emerging in the global era, we tried to characterise our assessment of the negative tendencies emerging in the global environment and our concerns about these tendencies in reference to building our nation. We have highlighted three areas of particular concern – the commodification of education, the impact of the globalisation of culture, and the proclivity of the global economy to economic polarisation. If left unchecked, these tendencies have dangerous implications for South Africa, and the world’s poor more broadly.

We believe that engagement with the global and universal must be guided by clearly articulated national principles and goals. If it is not guided by national objectives, it risks the danger of entrenching unequal power relations that have characterised the relationship between the developed and developing worlds for far too long. In fact, it will preclude a golden opportunity to celebrate and build on the diversity that is part of our common heritage. We firmly believe that the articulation of national and regional goals and objectives for education is extremely important if we are to withstand the pressure towards homogenisation, promoted by globalisation in its unequal form. Clear policy and political principles, combined with creative determination and social will, have never been as important as they are in the era that greets us.

5. Values in Education

5.1. Introduction

Woven into the fabric of South Africa, and particularly in the interface between the local and the global, is a profound challenge to reclaim the moral fabric of our society – to promote a set of shared values through which we can build greater social justice, equity, democracy and human dignity.

Over the past six years there has been an increased appreciation and deepened understanding of the meaning and importance of shared values. Church leaders talk of a ‘moral rejuvenation’. Education leaders speak about the role of values in education. Community leaders talk of providing young people with a sense of cultural meaning and pride. Woven together, they articulate the profound importance of values and cultural meaning in the development of a tolerant and compassionate democracy, especially as we engage with a global environment that poses enormous challenges to both social solidarity and the individual conception of the human spirit.

Domination can erode cultural pride and a set of shared values. Different forms of domination have challenged South Africa in devastating ways. Decades of colonisation and the long-term effects of domination, both through force and thought control, have brought about what Ngugi describes as ‘the domination of the mental universe of the colonised.’ Apartheid represented a further corruption of human values, denying the humanity of the majority of the population, undermining the values of tolerance, respect, openness and social honour. In the discussion above (Section 4.2.2), we tried to characterise the dominant ideology and culture emerging in the new global environment. The global economy brings with it its own culture and set of values, dominated by individualism, materialism, competition, as well as violent concepts of masculinity. The impact of these influences is especially powerful in urban areas where access to symbols and commodities of the global era are pervasive through television and other forms of mass media.

As we straddle one century of cultural and mental domination, and another century that promises to test the world’s understanding of compassion and human rights, the role of education in promoting common values becomes increasingly important. The promotion of a set of values has been a central objective of the post-apartheid education project. The principles of human rights and democracy provided the scaffolding for post-1994 policy development. Values are not an add-on feature, but a driving principle in both the function and form of reform processes. The policy framework has firmly positioned education as central to the socialisation of learners into a culture based on human rights, democracy and common citizenship. As this process has been consolidated, we have begun to shift our attention more squarely to education’s role in value and character formation.
We will first discuss how values have framed the educational transformation process since 1994. We will then briefly summarise our more targeted approach to values in schools.

5.2. Values in Education Transformation and Policy Developments

At the 13th Conference of Commonwealth Education Ministers held in Botswana in 1997, the South African Minister indicated that educational transformation in South Africa was tied directly to the overall processes of change in wider South African society, away from apartheid to a democratic dispensation based on a culture of human rights and common citizenship. The development of legislation and policies, the restructuring of the education system, and the reorientation of the very philosophical framework of education have been driven by this vision.

There is an explicit location of values in South African education within a liberal, democratic framework where the holistic development of learners occurs within the context of promoting human rights, common citizenship and peace. Drawing on the Constitution of the Republic of South Africa, the National Education Policy Act of 1996 states:

*The policy contemplated ... shall be directed toward ... enabling the education system to contribute to the full personal development of each student, and to the moral, social, cultural, political and economic development of the nation at large, including the advancement of democracy, human rights and the peaceful resolution of disputes (NEP Act, 1996, Section 3, Clause (b)).*

The Act articulates five core values to frame educational transformation: democracy, freedom, equality, justice and peace. It denotes a pluralist conception of democracy, an inclusive sense of citizenship and human rights, an emphasis on participation of and accountability to learners in educational processes, allowing for maximum mobility of learners across the education system, critical pedagogy, and flexible and continuous forms of assessment. These beliefs frame all levels of educational provision. Thus, early policy firmly established a values-driven framework for educational transformation.

The education policy framework approaches values as inextricably linked to the principle of redress. In view of this, the globally acknowledged values of democracy, human rights, justice, equality and peace take on additional, particular meanings within South Africa and for South Africans.

Values in education and training are profoundly reflected in the redesign of the curriculum. Curriculum 2005 (C2005) and the National Qualifications Framework (NQF) provide policy frameworks locating values centrally within education processes. C2005 approaches knowledge as being socially constructed, and as such learners are encouraged to critically evaluate knowledge, understand the context within which knowledge is articulated, and explore the extent to which such views apply to their own lives. The values of critical, relational and reflective thinking as well as participatory skills are central. Human rights, anti-racism, anti-sexism, equity, democracy and common citizenship also feature centrally. Initially C2005, as an outcomes-based curriculum, provided only overall guidelines. Responding to a recommendation emerging from our curriculum review process, these guidelines will be made more specific in future.

The National Qualifications Framework specifies ‘critical outcomes’ that must be met across the education and training system. These outcomes, as well as other valued outcomes, are outlined in Table 8. They emphasise the importance of critical, contextual and relational thinking skills, decision-making skills, respect for and co-operation with others, and human resource development. Democracy is underpinned by a notion of an active citizen. Human rights are associated with universal inclusivity. Interaction with and participation within a global political economy are also given particular attention.
Specific processes have been undertaken to better operationalise the values of gender equity and educational inclusion. In 1997, a Gender Equity Task Team (GETT) tabled its report. The GETT report suggested ways in which access to education and training for girls could be increased, pointed to the particular ways in which girls could be empowered through education and training, and suggested ways in which an anti-sexist ethos might be promoted on various learning sites. Gender Equity Units have been established at national, provincial and district levels to oversee and monitor progress in the implementation of these findings.

Similarly, a National Commission on Special Needs in Education and Training (NCSNET) and a National Committee for Education Support Services (NCESS) were appointed by the Minister in 1997 to operationalise the value of educational inclusion. NCSNET and NCESS have motivated for the mainstreaming of learners who experience ‘barriers to learning’ and for support to be made available to them. ‘Special needs’ are approached holistically, to include learners who may be physically challenged, victims of abuse, suffering from HIV/AIDS, or experiencing cognitive learning barriers.

Beyond the articulation of explicit values, a commitment to democracy, in both form and function, underpins the education transformation project. The South African Schools Act (RSA, 1996c) devolves decision-making powers to the local level, allowing school policies to be determined by and in ways that are relevant to members of school communities. Democratically-elected school governing bodies are delegated with important governance responsibilities including local policy formulation, organisation building and financial management. In this way, education seeks not only to incorporate values into educational content, but also strives to model the values of democracy and human rights through its social relations and decision-making processes.
Thus the policy framework since 1994 has served to place democratic values and human rights as a central feature of educational transformation. The realisation of these values will not happen quickly given the depth of our legacy. The South African Human Rights Commission reported that 62% of school learners (within a representative sample of schools) felt that there was racism in their schools (Vally & Dalamba, 1999). A national survey on value-oriented educational interventions concluded that while educational interventions in regard to human rights, democracy and citizenship are underway, they tend to focus on the legalistic understanding of these values, failing to bring them to life in local contexts (Carrim, 1998). The limitations of these results should not surprise or discourage us. Given the massive pressures working against this project, including the growing dominance of market values globally, it will take creative and committed educators to ensure that the values-driven policy framework translates into meaningful engagement with values at all levels of our system.

5.3. Values, Education and Democracy

In February this year, the Minister of Education established a working group on values in education. This initiative was designed to reflect on the quality of the national character to which we, as a people in a democracy, wish to aspire, and to consider the mechanisms by which education can best support the development of these values. The report emerging from this process forms the basis for further developing the capacity of our school system to contribute towards building desirable qualities of character such as honesty, integrity, tolerance, diligence, responsibility, compassion, altruism, justice and respect (DoE, 2000d). For a nation emerging recently from apartheid, the significance of considering values in education cannot be divorced from the need to reverse the deep racism that continues to undermine our society.

We continue to approach the area of values with caution, cognisant of a history during which prescribed morality was used to control rather than to grow a nation. Furthermore, in a country like our own, values must serve to celebrate our diversity rather than serve to homogenise, simplify or undermine. We sought to come up with our own understanding and approach to values in education, perhaps uniquely South African, reflecting the lessons we had learned from the last century, as we move into a new one.

The process led us to focus on the values of equity, tolerance, openness, accountability and social honour as especially important for the personal development of our school-going population. They also define the moral aspirations of South African democracy as defined in our Constitution and Bill of Rights.

However, the prescription of values per se has been less central to our process than defining a framework for approaching values in schooling. A simplified version of the approach emerging from this process is outlined in Figure 4. This approach provides us with a starting point to encourage a broader debate about the values South Africa must embrace within schooling.

Democracy and equity frame our approach to values. In a nation that is as scarred by inequities such as ours, no meaningful set of values can be commonly embraced outside of a commitment to redress and increasing political, social and economic participation in the running of our nation.

The pathway for developing democratic values in South Africa is not through simple prescriptions of values, but through providing learners with experiences that cultivate critical thinking, personal expression, a local sense of meaning, and expanded ways of thinking and communicating. Four cornerstones have been identified as central strategies to ‘seed’ democratic values in our context.
1. **Nurturing critical thinking skills.** This is no small task, given that the philosophical emphasis of apartheid was conformity, obedience to rules, and the suspension of intelligence. A democratic society flourishes when citizens are informed about local and global processes, when nothing is beyond question, and when ideas are explored to their fullest extent. Critical thinking skills can be nurtured in a variety of ways – through critical pedagogies, a critical look at history and current events, debating societies, and an emphasis on numeracy and the scientific approach to problem solving.

2. **Widening creative expression through art.** Creative expression and participation is an important way of cultivating knowledge of the self and others. The arts have been an important part of our heritage, too often undermined in the past. We believe that the power of performing arts and creative participation as an active celebration of diversity and expression must be harnessed as a tool to cultivate tolerance, openness and compassion.

3. **Nurturing a critical understanding of history.** The teaching of history is central to the promotion of all human values, including tolerance, openness and accountability. History, as a memory system, shapes our values and morality, because it is the avenue to reflect on human failure, achievement and possibility over the millennia. Three challenges stand out in our context. First, learners must be provided with a thorough understanding of human evolution to combat the myths underlying racial prejudice. Secondly, schools must provide a comprehensive history of all South African peoples, connected to the history of Africa, Asia, and Europe. Thirdly, history must stare down past abuses of human rights to understand the cause and effect of historical genocide and oppression. History, taught by committed and engaged educators, is one of our most powerful reflective tools to formulate values in a context wider than our daily lives.

4. **Nurturing multi-lingualism.** South Africa is a multi-lingual country with 11 official languages. Speaking the language of other people not only facilitates meaningful communication, but builds openness and respect as barriers are broken down and new meanings are explored. Nurturing multi-lingualism implies several challenges in our context. We are committed to providing an initial grounding in mother-tongue education. We are considering ways to increase second-language learning. Given the historical onus on black learners to learn English and Afrikaans, we remain with a particularly important project to ensure that non-African learners acquire at least one African language. Multi-lingualism must be a more central educational requirement, particularly for learners entering the fields of education, welfare and health.
5.4. Conclusion

Perhaps one of the most daunting challenges as we join the 21st Century is the complicated area of values in education. While the last century undermined human values through colonisation and apartheid, the coming century brings new and potentially just as dangerous challenges. The replacement of human values with market values has particularly dire consequences for an inequitable nation like South Africa. As we move into the new century, our education system has a special responsibility to confront growing individualism and fragmentation by laying a strong basis for social cohesion and solidarity. We will be judged by future generations by our ability to shift the momentum of hostile competition to embrace a better balance between innovation and compassion. The very basis of our nation depends upon our ability to supersede materialism through a more informed understanding of our past and commitment to our common future. The new policy framework for education and training places values in the centre of our transformation project. The recent process of developing our ideas about the role of values in schooling is the first step in a committed process to ensure that we meet this historic challenge.

6. Confronting HIV and AIDS

We must deal urgently and purposefully with the HIV/AIDS emergency in and through the education and training system. This is the priority that underlies all priorities, for unless we succeed, we face a future full of suffering and loss, with untold consequences for our communities and the education institutions that serve them. The Ministry of Education will work alongside the Ministry of Health to ensure that the national education system plays its part to stem the epidemic, and to ensure that the rights of all persons infected with the HIV/AIDS virus are fully protected (Minister of Education, Kader Asmal, July 1999).

6.1 Introduction

This section of the Country Paper is dedicated to an overview of the HIV/AIDS pandemic and the challenges it poses to the South African education system. If HIV/AIDS can be described as ancillary to the process of globalisation, then it represents the most urgent challenge of the global era for South Africa. While questions still remain about the exact degree of prevalence of HIV/AIDS, there is no question that it presents a massive challenge to the integrity of the education system in our country. In this section of the paper, we briefly consider the size of the HIV/AIDS pandemic in our country, its economic impact, and its specific impact on the education sector. We then consider our efforts, at national and departmental levels, to address the pandemic.

6.2. How Big is the Problem?

A recent report released by UNAIDS (2000) suggests that South Africa has the fastest growing HIV/AIDS epidemic in the world, with more people infected than in any other country in the world. The report estimates that over four million South Africans (about one in every eight adults) are HIV positive. Prevalence rates are highest among young people, especially teenage girls. While the methodology of these estimates is still being scrutinised, there is no question that HIV/AIDS represents a massive pandemic in our country.

Several agencies have used current estimates on prevalence and disease progression to make future projections about HIV/AIDS. While these projections should be treated with some caution, they paint a devastating picture. The Metropolitan Life Group estimates that South Africa will be in the most devastating throes of the AIDS epidemic by the year 2005, when they project that more than six million South Africans will be infected. They estimate that by this time, about 2.5 million people would have died of AIDS or an AIDS-related illness. Ominously, even ‘significant changes in sexual behaviour’, will trim back these estimates only marginally, since projected deaths will occur mainly among people who have
contracted HIV already (Marais, 2000: 5).

It is projected that HIV/AIDS will account for a 100% increase in child mortality – from an anticipated 48,5 per 100 000 births to almost 100 per 100 000 births in the year 2010 (UNDP & UNAIDS, 1998). Life expectancy is expected to drop by 20 years, from 68 to 48.

Orphanhood rates are projected to increase by a factor of five by 2005, which would mean that there would be nearly one million children without one or both parents (UNAIDS, 2000). In the KwaZulu-Natal Province, it is estimated that this year there will be between 197 000 and 278 000 HIV/AIDS orphans – between 5.8% and 8.8% of all children in the province.

The progression and magnitude of the HIV/AIDS pandemic appear to vary from region to region in South Africa. Over the decade, the KwaZulu-Natal and Western Cape Provinces have remained at extreme ends of prevalence levels, suggesting that the pandemic is at different stages in different parts of the country and among different age groups (DoH, 2000c: 11).

Between 1998 and 1999, for the first time, the estimated increase in HIV prevalence was not exponential, as it was between 1990 and 1998. This pattern suggests that the pandemic has reached some kind of plateau and has entered a period of stabilisation after a decade of rapid spread. The Department of Health reports that both Uganda and Thailand have reported similar shifts in their epidemiological profiles.

6.3. Economic Impact: Declining Productivity

There is evidence that productivity is declining in all sectors due to illness on the job, absenteeism due to personal or family illness, and funeral attendance. Old Mutual Actuaries and Consultants forecasts that the annual death rate in the workforce will rise from 5 to 30 per 1 000 workers.

Public sector services, in common with the private sector, will be affected by the doubling or even tripling of medical benefit costs. Economic growth will slow down because the economically active population – skilled workers and managers – will be reduced, and fewer young people with new skills will come into the labour market. The representation of women in the labour market, and their mobility, will decline as they, more than men, are diverted to care for the sick.

Skilled labour wage rates may increase as supply of personnel declines. Government revenue and sector budgets will be squeezed as the tax base shrinks at the same time as demand rises for health care and social support. Private sector health benefits may be curtailed – effectively shifting responsibility for rising costs of employee health care to the state and to families. Individual and family expenditure is likely to be directed away from ‘luxuries’ like housing and education towards medical care, funerals and associated costs.

Table 9: The Consequences of the Pandemic: Projections to 2010

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<tr>
<th></th>
<th>1999</th>
<th>2005</th>
<th>2010</th>
</tr>
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<tbody>
<tr>
<td>Percentage of SA workforce HIV+</td>
<td>11.5%</td>
<td>20%</td>
<td>22.5%</td>
</tr>
<tr>
<td>Percentage of SA workforce AIDS sick</td>
<td>0.4%</td>
<td>1.65%</td>
<td>2.7%</td>
</tr>
<tr>
<td>New AIDS cases per annum</td>
<td>145,256</td>
<td>466,356</td>
<td>625,180</td>
</tr>
<tr>
<td>Number of AIDS orphans</td>
<td>153,000</td>
<td>1,000,000</td>
<td>2,000,000</td>
</tr>
<tr>
<td>Life expectancy of SA females (years)</td>
<td>54</td>
<td>43</td>
<td>37</td>
</tr>
<tr>
<td>Life expectancy of SA males (years)</td>
<td>50</td>
<td>43</td>
<td>38</td>
</tr>
</tbody>
</table>
6.4. Understanding the Causes

The dominant response has been to try and understand the disease within conventional frames of understanding – leaving hidden the many ways in which AIDS reconstructs the familiar and warps the assumptions we bring to bear on it. Thus AIDS is viewed as a reflection of the status quo, with the epidemic fuelled by poverty, migration, discrimination, powerlessness and the like. All these factors apply. But they do not complete the circle of understanding we seek. AIDS is also a disease lodged in the behavioural patterns and value systems that become adapted to the presence of the disease (Marais, 2000: 11).

Several scientists and social scientists have tried to explain factors that underpin the dramatic spread of HIV/AIDS in South Africa. Analysts point to the legacy of apartheid and the migrant labour system, the disruption of family and communal life, a good transport infrastructure and high mobility, high levels of poverty and income inequality, very high levels of other STDs, and the low status of women. Researchers point out that many young South Africans are sexually active at an early age, commonly have multiple partners, and do not practice safe sex. Sociological studies suggest that communication about sexuality in the home is minimal in many South African families. Researchers have also found a connection between the spread of HIV/AIDS, sexual violence and child abuse.

While all of these factors contribute to our understanding, they are not yet satisfactory. The majority of these factors are found, in varying forms, in many countries across the world. We continue to explore the critical complex of factors that drive the spread of the disease so forcefully in our context.

6.5. The Impact on Education

6.5.1. Enrolments: Declining and Changing Demand for Education

Currently no statistics are available with which to accurately estimate the direct and indirect consequences of HIV/AIDS on school attendance. However drop-out rates due to poverty, illness, lack of motivation and trauma are likely to increase. Absenteeism among children who are care-givers or heads of households, those who help to supplement family income, and those who are ill, is bound to rise.

HIV/AIDS is likely to slow down population growth rates and alter the structure of the population. As the proportion of potential parents (20-40 years) declines, numbers of orphaned children increase and poverty deepens, school enrolment rates will decline and drop-out rates will rise. There may be negative school population growth in places.

There may be an increased demand among sick parents for early childhood education and an increase in pre-school intake. There may be greater demand for second-chance education by learners returning to education after an absence from the system, or for more flexible learning opportunities for those who are ill, care-givers or wage-earners. On the other hand, these demands may be offset by fewer births and more deaths of under-fives, and the fact that families will have less disposable income for school fees, voluntary funds, transport costs and uniforms. We are currently undertaking an impact study to better anticipate the supply and demand implications of the pandemic (see below).

6.5.2. Educators: Reducing Supply and Quality of Education

Until the release of the review of the impact of HIV/AIDS on the education sector to be released later this year, we have inconclusive data about the prevalence of HIV/AIDS among educators. Available figures suggest that 12% of educators are infected. Others speculate that these figures may indeed be higher, given that teachers are educated, mobile and relatively affluent, and thus fall into a population category that has been shown to be especially at risk.
The impact of HIV/AIDS on educators is profound. Some will be ill, absent and dying. Many others will be preoccupied with family crises. As professionals, educators will often be required to take on responsibility for orphans within the extended family.

Job mobility among educators is likely to increase as a result of the pandemic. Analysts suggest that for every teacher leaving education (due to mortality, morbidity, better job opportunities), approximately 2.6 educators would have to be trained to keep up with demand. Even then educator: learner ratios are expected to decline to 1:50 by 2006. This would threaten the gains made in terms of educator: learner ratios since 1994.

However, the supply-demand equation is complicated. Educator recruitment targets may be lower than at present if enrolments decline or do not grow as expected. Given uncertainty about likely levels of chronic morbidity, mortality and other types of ‘wastage’, it is very difficult to make educator requirement projections with any degree of confidence on the basis of current data.

Educational management capacity is fragile at national, provincial and district level. Provincial and district administrations find it difficult to attract skilled personnel. At school level, many principals have not yet received sufficient support or training to enable them to be creative about local management of education. The situation will become worse as the pandemic takes hold.

As well as managers, the system will lose experienced teacher mentors and teacher educators in universities and colleges whose career experience cannot be replaced. Younger and less experienced educators will invariably take their place, but this may impact on the quality of educator education.


6.6.1. Policy and Planning

There has been a wide range of policy initiatives at the national level, designed to combat the spread of HIV/AIDS. Over the past year the national government has attempted to streamline these planning initiatives into a national programme. In June 2000 the Minister of Health launched the ‘HIV/AIDS/STD Strategic Plan for South Africa, 2000-2005’, as a ‘broad national strategic plan to guide the country’s response as a whole to the pandemic. The plan seeks both to reduce HIV infection rates and to address the broad impact of HIV/AIDS on individuals, families and communities. The strategic plan establishes a structure for implementation. The new strategy is creative and, in public health terms, comprehensive. It seeks to link the resources of government with those of national and international partners, recognising ‘that no single sector, ministry, department or organisation is by itself responsible for addressing the HIV epidemic’. The plan focuses on:

1. **Preventing the spread of the disease** through the promotion of safe and healthy sexual behaviour, improving the management and control of STDs, reducing mother-to-child transmission, addressing issues relating to blood transfusion and HIV, providing appropriate post-exposure services, and improving access to voluntary testing and counselling.

2. **Providing treatment, care and support** in health facilities and in communities, with an emphasis on developing the provision of care to children and orphans.

3. **Supporting research, monitoring and surveillance**, including supporting the development of an AIDS vaccine, investigating treatment and care options, conducting policy research, and undertaking regular surveillance.

4. **Protecting human and legal rights** through creating an appropriate social, legal and policy environment.
In the first half of this year, the ‘National Integrated Plan for Children Infected and Affected by HIV/AIDS’ was drafted for Cabinet approval. Driven by the Department of Health, it has been designed co-operatively by the Departments of Health, Education, and Welfare. Although the plan is aimed principally at implementing and supplementing the Life Skills Programme for schools, its elements speak directly to alleviating the impact of the pandemic on children and their families.

The plan is intended ‘to ensure that children have access to integrated prevention and support services which address their basic needs for shelter, health care, family or alternative care, information, education and protection from abuse and maltreatment’. It is designed specifically to strengthen Life Skills teaching in primary and secondary schools, find ways to care for orphans and others affected by AIDS, and make voluntary testing and counselling available.

6.6.2. Resources

During the 1990s, the state’s AIDS budget doubled. Cabinet ranked HIV/AIDS among government’s 20 social priorities, earning the programme privileged access to resources, and almost R50 million in foreign funding was raised to finance it. In 2000, R450 million (additional to departmental budgets) has been allocated over three years for the integrated strategy for children affected by HIV/AIDS. Provincial administrations are preparing business plans for using these funds. USAID, DfID, the EU and other international co-operation agencies are providing supplementary financial and technical support to both government and NGOs.

6.6.3. Partners

The 1994 plan stressed that an effective response to the pandemic depended on strong co-ordination between government and civil society. Approximately 650 AIDS-related NGOs, CBOs (Community-based Organisations) and faith-based organisations operate at grassroots level. International agencies (including the United Nations, the European Union and representatives of the Belgian, United Kingdom and United States governments) have made substantial technical and financial contributions to AIDS activities. Increasingly universities are focusing their activities on issues related to HIV/AIDS.

NGOs and CBOs have felt that they have been under-resourced in current partnership arrangements. The Department of Education is committed to co-operation with NGOs. In practice, partners at provincial and local levels will have to be strengthened. Sustainability and affordability of programmes, costing of services, co-operative funding mechanisms to assist the flow of international funds through government and NGO systems, and effective use of resources: all these are matters that must be addressed to strengthen these partnership arrangements.

6.7. Role of the Education Sector

In the early days of the epidemic, the issues associated with HIV/AIDS were discussed largely in health terms. This has shifted dramatically over the past several years as the pandemic is framed in the context of its holistic social impact. Our growing understanding of the complex social drivers of the spread of the disease has increasingly placed the Department of Education as a central player in addressing the pandemic. In July 1999 the Minister of Education identified nine strategic priorities for educational development. One of the nine was the HIV/AIDS pandemic.

This priority has been operationalised into three programme objectives in the Tirisano implementation plan (DoE, 2000a). Each is linked to anticipated outcomes and performance indicators. These programmes are briefly outlined below.

Structures for driving Tirisano’s HIV/AIDS programme are provisionally in place. The Chief Director for General Education and Training has been identified as the ‘champion’ for HIV/AIDS programmes, and is accountable for co-ordinating programme performance. Day-to-day responsibilities for guiding
components of the Department of Education’s strategy are spread through the Office of the Minister and the Department of Education.

Two HIV/AIDS contract posts are being made available to each provincial education department for three years, funded from a special budgetary allocation. Every provincial department is required to designate an HIV/AIDS Programme Manager, as well as a working group to implement, monitor and evaluate the programme, and to advise management regarding programme implementation and progress. Provincial education departments’ HIV/AIDS business plans were completed in August. The implementation of these business plans will rely on both public and private funding. Provinces are securing additional donor and private funds to support their plans.

6.7.1. Project 1: Awareness, Information and Advocacy

Project Profile: Awareness, Information and Advocacy

<table>
<thead>
<tr>
<th>Strategic objective</th>
<th>...to raise awareness and the level of knowledge of HIV/AIDS among all educators and learners; to promote values, which inculcate respect for girls and women and recognise their right to free choice in sexual relations.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anticipated Outcomes</td>
<td>...increased awareness, understanding, knowledge and sensitivity of the causes of HIV/AIDS, its consequences and impact on individuals, communities and society in general; eradication of discriminatory practices against individuals affected by HIV/AIDS; development of HIV/AIDS policy for the education and training system; change of attitude and behaviour towards sexuality.</td>
</tr>
<tr>
<td>Outputs</td>
<td>...copies of HIV/AIDS policy distributed to all education and training institutions (February 2000); information materials available in all education and training institutions (October 2000); gender sensitivity part of all learning programmes (ongoing, starting October 2000).</td>
</tr>
<tr>
<td>Performance Indicators</td>
<td>...myths about HIV/AIDS are eradicated; increased acceptance of the need to practice safe sex; establishment of non-discriminatory practices in all education and training institutions, including departments of education; finalisation of the HIV/AIDS policy; popular material on HIV/AIDS is readily available; visible change of attitude towards girls and women.</td>
</tr>
</tbody>
</table>

The clearest progress that has been made with this project has been the development of policies and guidelines for educators and learners with reference to HIV/AIDS. In August 1999 the ‘National Policy on HIV/AIDS for Learners, Students, and Educators’ was finalised. Some of the most important provisions are summarised in Box 2.
The Department’s guidelines for educators have been distributed through provincial structures. These guidelines call for a concerted ‘struggle’ against the pandemic by all organs of society, for openness, for recognition of the dignity of those who are infected, and for care for those affected by HIV/AIDS. It sets out the role of educators to (a) exemplify responsible sexual behaviour, (b) spread correct information, (c) lead discussion among learners and parents, (d) create a work environment which does not discriminate against those who are infected or affected, (e) support those who are ill, and (f) thus make ‘the school a centre of hope and care in the community’.

The booklet targets the responsibilities of male educators. It says: ‘There must be an end to the practice of male teachers demanding sex with schoolgirls or female teachers. It shows selfish disrespect for the rights and dignity of women and young girls. Having sex with learners betrays the trust of the community. It is also against the law.’

Schools are encouraged to develop their own policy on HIV/AIDS, consistent with the Constitution and the law, national policy and HIV/AIDS guidelines for schools. They are encouraged to work closely with local community leaders to provide information and support to the surrounding communities.

<table>
<thead>
<tr>
<th><strong>Box 2: National Policy on HIV/AIDS for Learners, Students and Educators</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>The constitutional rights of all learners and educators must be protected equally.</td>
</tr>
<tr>
<td>There should be no compulsory disclosure of HIV/AIDS status.</td>
</tr>
<tr>
<td>The testing of learners as a prerequisite for attendance at an institution, or of an educator as a prerequisite of service, is prohibited.</td>
</tr>
<tr>
<td>No HIV+ learner or educator may be discriminated against, but must be treated in a just, humane and life-affirming way.</td>
</tr>
<tr>
<td>No learner may be denied admission to or continued attendance at an institution because of his or her actual or perceived HIV status.</td>
</tr>
<tr>
<td>No educator may be denied appointment to a post because of his or her actual or perceived HIV status.</td>
</tr>
<tr>
<td>Learners and educators who are HIV+ should lead as full a life as possible.</td>
</tr>
<tr>
<td>Infection control measures must be universally applied to ensure safe institutional environments.</td>
</tr>
<tr>
<td>Learners must receive education about HIV/AIDS and abstinence in the context of life-skills education as part of the integrated curriculum.</td>
</tr>
<tr>
<td>Educational institutions will ensure that learners acquire age and context-appropriate knowledge and skills so they can behave in ways that will protect them from infection.</td>
</tr>
<tr>
<td>Educators need more knowledge of, and skills to deal with HIV/AIDS and should be trained to give guidance on HIV/AIDS.</td>
</tr>
</tbody>
</table>
6.7.2. Project 2: HIV/AIDS within the Curriculum

Project Profile: HIV/AIDS within the Curriculum

<table>
<thead>
<tr>
<th>Strategic Objectives</th>
<th>…to ensure that Life Skills and HIV/AIDS education is integrated into the curriculum at all levels.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anticipated Outcomes</td>
<td>…every learner understands the causes and consequences of HIV/AIDS; all learners lead healthy lifestyles and take responsible decisions regarding their sexual behaviour.</td>
</tr>
<tr>
<td>Outputs</td>
<td>…materials for primary schools (June 2000); educators trained to facilitate Life Skills and sexuality in education (ongoing, starting June 2000).</td>
</tr>
<tr>
<td>Performance Indicators</td>
<td>Life Skills and HIV/AIDS education is integrated across the curriculum; increase in knowledge of, and changed attitudes towards, sexuality and HIV/AIDS among learners; reduction in incidence of HIV/AIDS among learners.</td>
</tr>
</tbody>
</table>

Development of the Life Skills programme began in November 1995, when the Departments of Health and Education formed the National Co-ordinating Committee for Life Skills and HIV/AIDS. The programme was designed to improve the knowledge, skills and attitudes of learners and educators, and to provide motivational support. The Committee supervised the development of the Life Skills curriculum and guidelines for its implementation, initially at secondary level. Each provincial Department of Education is responsible for implementing the curriculum, and for training and counselling educators in its use.

6.7.3. Project 3: Planning for HIV/AIDS and the Education System

Project Profile: Planning for HIV/AIDS and the Education System

<table>
<thead>
<tr>
<th>Strategic Objectives</th>
<th>…to develop planning models for analysing and understanding the impact of HIV/AIDS on the education and training system.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anticipated Outcomes</td>
<td>…plans and strategies to respond to the impact of HIV/AIDS on the sustainability of the education and training system, and the human resource needs of the education and training system in particular, and of the country more generally; establishment of care and support systems for learners and educators affected by HIV/AIDS.</td>
</tr>
<tr>
<td>Outputs</td>
<td>…national plan to deal with the impact of HIV/AIDS on the education and training system (December 2000); impact studies (December 2000); reliable statistical database on the impact of HIV/AIDS (July 2000).</td>
</tr>
<tr>
<td>Performance Indicators</td>
<td>…improved data and planning models are available; impact studies on all aspects related to the education and training system have been initiated and/or completed; responsiveness of national and provincial education plans and strategies to the impact of HIV/AIDS.</td>
</tr>
</tbody>
</table>
The demand, supply and quality of learning and teaching will be affected by the HIV/AIDS epidemic. This, in turn, will affect the pattern of human development and economic growth in South Africa. This project, then, has been established to improve our understanding of the impact of HIV/AIDS on education, and to improve our ability to address the implications through forward-looking planning. Information does not have to be perfect. Even less-than-rigorous evidence will make it possible to anticipate how HIV/AIDS will influence educator attrition (especially in key skills like science and mathematics), education costs and quality, changing demand and supply, and drop-out and retention rates.

The University of Pretoria’s Centre for the Study of AIDS and the University of Natal Durban’s Health Education and HIV/AIDS Research Division are collecting and analysing information about the pandemic.

There are three governmental initiatives that contribute to this project. First, HIV/AIDS demographic projections are being made, using the most recently calibrated version of the Metropolitan Life-Doyle Model. Projecting the impact of HIV/AIDS on educators will be calibrated with public service projections made for the Department of Public Service Administration. Secondly, a government-wide impact survey, managed by the Department of Health, will contribute to the understanding of the impact in the education sector. And, most immediately, a team of consultants has been commissioned to advise government, including the Department of Education, about the planning implications of and possible responses to the pandemic. Their scope of work will consider the impact of HIV/AIDS on society and human resource development. More specifically it will consider how HIV/AIDS will impact on both the supply and demand of education. The assessment will ultimately explore all education sub-sectors (primary, secondary and tertiary levels, early childhood development and administrative, management and support functions, vocational and technical education, and adult education). A key challenge is also to evaluate the effectiveness of the many interventions in place.

6.8. Conclusion

Beyond the enormous suffering of individuals and families, South Africans are beginning to understand the cost in every sphere of society, observing with growing dismay the impact [of HIV] on the efforts of our new democracy to achieve the goals of reconstruction and development… All sectors and all spheres of society have to be involved as equal partners. We have to join hands to develop programmes and share information and research that will halt the spread of this disease and help develop support networks for those who are affected… (Nelson Mandela, addressing the World Economic Forum, 1997).

Given the importance of young people in the transmission patterns, the heart of HIV/AIDS prevention is located at the moment when a young person engages in sexual intercourse. Whether coerced, of free will or tied to economic station, it is a moment that reaches to the depths of a young person’s sense of esteem, beauty, power, control, and the need for love or touch. It is not simply about knowledge or information. It is about the kind of understanding that can change decisions and behaviour during one of the most intense moments of human interaction. The foundation for effecting such decisions is based on a sense of self, a sense of one’s place in the world, of one’s personal power and integrity. That sense of self is itself a product of conceptions of gender, power, religion and the value of what it means to be human. In this context, the fight against HIV/AIDS cannot be separated from our larger reconstruction and development project.

Over the past decade we have come increasingly to understand the magnitude and nature of the HIV/AIDS pandemic in our country. The implications of the pandemic are overwhelming. However, we remain committed to addressing the impact of HIV/AIDS with both determination and compassion. We remain committed to learning about the pandemic and strategies to address its impact and spread. The ‘HIV/AIDS/STD Strategic Plan for South Africa, 2000-2005’, and the ‘National Integrated Plan for Children Infected and Affected by HIV/AIDS’, provide the basis for an integrated national approach to the pandemic. The focus on HIV/AIDS in the Tirisano Implementation Plan, including a focus on awareness,
information, lifeskills, and support, represents the effort on the part of the Department of Education to respond purposefully to the crisis. The success of our reconstruction and development project largely depends upon our continued innovation and determination in this area.

7. **Future Directions**

We believe that this Fourteenth Conference of Commonwealth Education Ministers represents a landmark opportunity. The end of the 20th Century and the beginning of the 21st Century represents an important moment in the history of our nations, individually and collectively. Future generations of historians will look back on this moment and judge our wisdom and foresight as we share experiences and chart our paths forward.

The coming of a new millennium challenges all of us to reflect upon where we have come from and to consider where we are headed. The discourse of globalisation runs the risk of transporting us too far away from local realities inherited from the past. The challenges we have inherited from the 20th Century and any wisdom we may have gained, will largely frame the early part of the new century. While we must address the new challenges and opportunities associated with the coming century, we must also reaffirm our commitment to the more enduring challenges facing our education system.

7.1. **Challenges Rooted in the 20th Century**

In the case of South Africa, many of the most central challenges of the 21st Century are rooted in our troubled past. Since 1994 a central priority of the Government has been the provision of universal, quality education within a system of lifelong learning. The nature of this provision, in the context of wider demands on the fiscus and the practical implementation challenges at the chalk-face, continues to frame our most important challenges.

A priority challenge continues to be to build a high quality public service with an emphasis on accountability, transparency and efficiency. This implies a massive undertaking to rebuild the organisational systems and culture of the public service. It includes rebuilding administrative systems on the basis of outcome performance rather than bureaucratic tradition. It implies breaking a rules-oriented organisational culture to unleash our creative and innovative potential. It requires the development of a new culture and ethos within the public service where passivity is replaced by active engagement and a sense of purpose, empathy, pride, and professionalism. Our approach to this massive challenge is framed by an emphasis on both accountability to performance and developmental support. The Public Finance Management Act and the Public Service Regulations, which seek to define performance accountability are important steps in this direction. The development of knowledge and information systems, including the Education Management Information System, is also an important step along this path.

A priority challenge will be to continue to fight the fierce racism of our past that has deep roots in the minds of our people and in the institutions of our society. President Mbeki has recently articulated our challenge in clear terms. We live in one nation, but largely occupy different worlds. While we celebrate the miracles of reconciliation that characterised the close of the century, the fight against racism – intellectual as well as structural – has only just started. Developing local languages and building multilingualism are a part of this challenge.

It will continue to be a challenge to invest in education in effective ways, in the context of fiscal constraints. Budgets must be credible, valid and reliable. They must be directed towards the achievement of redress and inequity. Our plans to allocate future budgets to schools according to an algorithm, privileging the rural and urban poor, represent our next step in this direction.

Effective spending must be complimented by establishing innovative service partners in line with the capacities of NGOs and the private sector. A closely related challenge will be to mobilise an active
citizenry and widen the participation of civil society in school life. Plans to build the capacity of School Governing Bodies and Learner Representative Councils will be key levers in widening and deepening participation in school life.

It will continue to be a challenge to build a dedicated community of educators. This will entail a gradual reconception of what it means to be an educator. The image of an educator was unravelled during apartheid. Too many educators were turned into disciplinarians or stripped of their professional and civic pride. Professionalism, morale and spirit will have to be built in the new century through a massive investment in educator development. Educators must be developed as facilitators of knowledge, as managers of innovation and group engagement, as community leaders, and as lifelong learners.

Several initiatives in this area have begun, including a comprehensive skills development plan, a system of performance appraisals, and a programme of national teacher recognition awards. Together with teacher organisations we are in the process of building a labour relations framework which reaches beyond traditional areas of negotiation to better encompass the professional issues of pedagogy and quality outcomes.

It will continue to be a central challenge to be to build functional and performing public education institutions, and to ensure high quality education for all. In reality we continue to face severe challenges in the area of basic school performance, especially within schools servicing our nation’s poor. We must focus on basic school provisioning when a large number of schools are still without textbooks, stationary, electricity and running water. We must focus on the most basic issues of teaching when too high a proportion of our learners emerge from the system without confident literacy and numeracy skills. Some of the systemic inefficiencies are intricately embedded in poverty. Given the profound relationship between poverty and educational outcomes, our challenge will continue to be to understand and address inefficiencies in the specific contexts of rural and urban poverty. Issues of quality will have to continue to embrace issues of gender equity, as well as the inclusion of learners with special needs. We have begun to build quality assurance systems, including benchmarking, systemic evaluations and the development of organisational leadership. These systems will continue to require our focused efforts until we have better managed to stabilise basic quality throughout our school system.

We will have to continue to build our further education and training sector. While basic education is vital, it will not fully prepare our citizenry for confident economic participation. We must continue efforts to bridge the gap between schooling and work, especially within communities traditionally characterised by high rates of unemployment. We must continue to approach issues of the development of entrepreneurial skills, vocational and technical skills, as well as service and managerial skills in innovative ways. We must continue to concentrate on bringing to life a system that actively facilitates flexible and lifelong learning.

Finally, we must commit ourselves to building a vibrant higher education sector. At the end of 1999, President Mbeki emphasised, in an address to the Association for the Development of Education in Africa (ADEA), the importance of higher education in its relationship to a continental renaissance. Our present phase of development requires growth and consolidation of a class of intellectuals whose fundamental task must be in the economic and social spheres. Our project is to develop a special character of intellectuals engaged with, rather than isolated from, the outside world, committed to building a humane society based on values of compassion and co-operation. The development of a corps of socially responsible intellectuals will be important as we navigate the complex terrain of the 21st Century.

7.2. New Challenges of the 21st Century

While many of our most important challenges have their roots in our history, there are important new opportunities and challenges emerging in the new century. This paper has concentrated on our understanding of these opportunities and challenges as they relate to educational transformation in
South Africa.

One of the most important opportunities of the global era will be to harness the positive capacities of new technologies for education. We have initiated several programme and policy efforts to guide us in this area. The priority given to mathematics, science and technology in our new curriculum framework, as well as initiatives like those to exploit public broadcasting for educational purposes, reflect our commitment to strategically engage in this area. In future we will have to continue to be thoughtful about how to maximise the effectiveness of technological investments in a context overwhelmed by basic needs. The answer is not to become the ‘dumping ground’ for outdated technologies. We must continue to harness the potential of convergence technology to further our economic, social, and cultural growth, and ensure that technology is driven by human development and capacity, rather than allowing technology for its own sake to take over the agenda.

While the new century affirms the importance of education, there are worrisome tendencies woven within its fabric. How can we unite to affirm basic education as a human right, transcendent of the economic purposes it serves? How can we manage, or regulate the opportunities and dangers posed by the growing private industry of further and higher education? How do we uphold the integrity and purpose of public further and higher education in this context? What solutions can we put in place to retain skilled professionals in developing nations? How can we ensure that socially useful knowledge is not inaccessible, due to the marketisation of ideas through intellectual property rights?

One of the most daunting challenges as we join the 21st Century is the complicated area of values in education. While the last century undermined human values through genocide, colonisation and apartheid, the coming century may bring other forms of mental and cultural domination. In this paper we discussed our challenge to maintain the integrity of local and human values in the context of the marketisation of global culture. The replacement of human values with market values has particularly dire consequences for a nation like South Africa, with an inequitable past. As we move into the new century, our education system has a special responsibility to confront growing individualism and fragmentation by laying a strong basis for social cohesion and solidarity, and to shift the momentum of hostile competition to embrace a better balance between innovation and compassion. The very basis of our nation depends upon our ability to supersede materialism through a more informed understanding of our past and commitment to our common future. The new policy framework for education and training places values in the centre of our transformation project. The recent process of developing our ideas about the role of values in schooling is the first step in a committed process to ensure that we meet this historic challenge.

Our entire reconstruction and development project in the 21st Century will depend upon our determination and creativity in addressing the HIV/AIDS pandemic. While daunting, we remain committed to understanding its constitution, and determined to respond in a holistic way to its challenges. In a country facing deep poverty, we open our minds to the unexplored relationship between immuno-suppression and poverty – likely to complicate the epidemic further in our context. The pandemic requires determination, humility and compassion. Responding to the HIV/AIDS pandemic, and supporting South Africans who are both infected and affected, will continue to demand priority focus across government and within education in particular.

7.3. Looking Toward the Future

While the internationalisation of economies arguably started even before the last century, the dawn of the 21st Century certainly represents a new moment in the process of globalisation.

Some observers in South Africa consider ‘globalisation’ to be simply a new face of age-old domination patterns. As an African nation, a developing nation, we are familiar with the ability of domination to adopt different guises. However, to underestimate the new opportunities and challenges, or to locate ourselves as ‘victims’, would be an historic mistake. While some commentators despair at the complexity of the
current global environment, particularly with reference to the welfare of developing nations, we take a slightly different view. While cognisant of supra-national developments, we cannot stand by and watch the erosion of our efforts to build a democratic society. The situation is complex and therefore affirms the need for new and different responses from us all.

Analysts suggest that, in the context of globalisation, nation states are losing power and autonomy. There is a suggestion that the nation state begins to lose the responsibility for national development, intimating a ‘nation-state fatalism’, in the context of the balance of powers between international markets and the political apparatus of the state. Clearly, the role of the state is changing. The state’s direct power over economic developments is especially diminished in comparison to the economic traditions of the past. However, in this context, our experience underscores the growing responsibility of the state and regional networks with reference to social, cultural, and economic development. A nation’s ability and commitment to address educational challenges becomes increasingly important in a system where human capacity is central. A nation’s ability to provide a basic safety net for the poor becomes critical in the context of an economic system with a powerful capacity to exclude. Furthermore, it will be the creative thinking of national leaders across nations that must make ‘new history’ to change the current trajectory of globalisation, a trajectory that, if left unchecked, promises too little to the world’s poor and vulnerable.

Respected analysts of globalisation suggest that the current trajectory of globalisation will inevitably lead to the deepening of historical divisions within and between nations, entrenching the plight of the world’s poor and vulnerable. Elite centres of power across the world will be inter-connected in real-time, while the majority of the world will be relegated to ‘black holes’, excluded and marginalised from economic activity. If we continue to speed up trade liberalisation and emphasise macro-economic stability and competitive labour policies in abstraction from poverty alleviation, job creation, community development and issues of human dignity and social solidarity, we risk arriving in an era of unprecedented social despair.

However, unlike some analysts of globalisation, we do not think that the current trajectory is inevitable. Like any historical process, there are contradictory tendencies, mediated through active engagement. The issue is not whether we can shift the trajectory of globalisation, but rather what is our collective vision for doing so? The new century challenges the socio-economic basis of nations and peoples disadvantaged during the previous century. How do we mediate the terrain to prevent the massive social exclusion and despair predicated by analysts of globalisation? How can we respond to the global environment in a way that undermines its capacity to polarise nations and peoples? How can we respond to the global environment in a way that maximises job creation and poverty alleviation in the developing world? The Marshall Plan was designed to accelerate the development of certain nations into the industrial age. The current trajectory of globalisation calls for another far-reaching and creative programme to ensure that the polarising power of globalisation does not create further misery. What would such a plan look like? What are the dangers of such a plan? How could we ensure that developing nations have power in driving its agenda?

There is a Sotho expression which says, ‘Motho ke motho ka batho’, which loosely translates to: ‘people are people because of other people.’ This saying expresses the best possibilities of globalisation, and perhaps even indicates the way forward for developing and emerging nations. President Thabo Mbeki and other world leaders have been calling for a re-think of globalisation among nations who share a commitment to human rights and democracy, and a determination to build peace and equity in the world. This Conference, we believe, presents a landmark opportunity to share our experiences, concerns, strategies and visions to better understand the realities of globalisation and to imagine how to sculpt ‘new history.’
ENDNOTES

1According to population projections (reflecting growth and mortality rates) and the 1996 census data (SAIRR, 2000: 8). A category of ‘unspecified’ accounts for 0.9% of the population. Figures do not add up due to rounding.

2Population growth is now 1.9% per annum as opposed to 2.2% in the mid-1980s (Statistics South Africa, 1998).

3Barriers to access include fixed-line infrastructure and affordability. Internationally, basic telephony should cost a household not more than 0.7% of its total income. South African figures suggest that the total household monthly expenditure on telephones is 2.87%.

4The mining of gold and diamonds, in particular, was the economic basis for the development of apartheid monopoly capitalism where cheap labour was extracted forcefully from the ‘black’ population. Between 1980 and 1990 the GDP contribution of the minerals-energy complex fluctuated around 25% (Fine & Rustomjee, 1996).

5Income less than R353/adult/month.

6Poverty in South Africa is directly linked to the political economy of inequality in a country in which wealth and power have historically been the preserve of whites. The apartheid government successfully used the state for the transformation of the position of poor and petty bourgeois Afrikaans-speaking whites, the rise of Afrikaner finance capital and its inter-penetration with English-speaking mining and manufacturing capital in the 1960s. Apartheid social policy involved a commitment to white supremacy through ‘separate development’. Racial domination became institutionalised in all aspects of public and private life.

7Two-thirds of South Africa’s poor live in three rural provinces – Eastern Cape (24%), KwaZulu-Natal (21%) and Northern Province (18%).

8Per capita GDP growth rates depend upon reliable census statistics. Given the unreliability of pre-1994 census figures, these figures must be considered with some caution.

9In November 1998, the Medium Term Budget Policy Statement revised certain aspects of the expenditure framework of 1997/8. The revision was felt to be necessary in the face of a world economy characterised by financial crises, a slowdown in world trade, and financial disinvestment from emerging market economies. This slowdown in the world economy forced South Africa to lower forecasts of growth over the next three years.

10The Usombomvu Fund was financed by the demutualisation of Sanlam and Old Mutual in 1998 and 1999 respectively.

11The Department of Education understands ECD as an umbrella term that applies to the processes by which children, from birth to at least nine years, grow and thrive, physically, mentally, spiritually, morally and socially. The emphasis on ECD thus far has been on standardising training for ECD practitioners and conducting research on the viability, form and function of a reception year.

12The Education for All 2000 Assessment obtained an even higher estimate of 16%, using a 10% sample of the 1996 census.

13While in the early grades, female learner enrolment constitutes less than 50%. The later grades enrol more female learners than male. This is due both to the higher drop-out rate of male learners in the later years of the system and to the higher repeater rate of female learners.
The proportion of real growth (approximately 4% over this period of time) reflects the growth of the national fiscus (approximately 8% annually), rather than reprioritisation.

Thus far there has been little evidence of social expenditure being funded by money saved from efficiency gains. Until economic growth improves, a better social safety net for the poor will be required. A set of targeted interventions will be necessary to combine poverty alleviation with longer-term, skill-intensive growth requirements.

National education spending was budgeted to be R7.48 billion. This included national department spending, transfers to universities and technikons, a conditional grant of R210 million which was transferred to the provinces, and funding for other statutory obligations such as the South African Qualifications Authority. The provincial education budget allocations totalled R42.3 billion.

Table 7 shows the per capita allocation of the education budget to provinces in 1994/95 and 2000/01. The 1994/95 figures show the extent of inequity inherited from the former departments in the first year that the budget was divided into provincial allocations. This constitutes the base year from which movement towards inter-provincial equity should be measured.

Beyond a normative weighting reflecting resource needs, the basic education component will reflect the mix of learners, an adjustment for inappropriate aged learners, poverty levels and support for independent schools.

Although the link between better paid educators and outcomes is not absolute, it remains true that some provinces are placing more qualified educators on average per classroom. If we assume that educators who are paid less have lower qualifications, then quality human resource deployment is still inequitably distributed. This remains a concern.


Take 5 is a youth magazine programme offering young people an opportunity to engage in dialogue about issues of concern to young people. School TV is designed to provide back-up support to the curriculum in the classroom. It is supported by print materials sent to schools. Educator Express is a teacher magazine programme exploring issues facing educators. Soul City is a multi-media primary health edutainment series that involves a television drama series, radio drama and print materials. Its effect has been monitored by careful evaluation that shows it has an impact on awareness and behaviour around primary health issues. A high profile advocacy campaign accompanies each series. Soul Buddyz is a recently launched children’s multi-media edutainment series aimed at 8 to 12 year olds, including a television drama, radio drama and a book written for Grade 7. Yizo Yizo is a television drama series commissioned by the Department of Education. Stories are based on careful research and present an educational message by problematising issues that face young people.

Much development has occurred in the area of distance education. There has been a significant shift from a correspondence to a distance mode, which includes contact and mixed media approaches.

The CETDE has developed a 7 step ‘value chain’ to guide the implementation of ICTs in schools, prioritising the ‘warm-ware’ (human resources, capacities, and vision) required for successful utilisation of ICTs in the school context.

Quoted in a lecture to the Second NIEP Oliver Tambo Lecture delivered by President Mbeki, 11 August, 2000.

This section is drawn from a comprehensive paper prepared by Carol Coombe (2000), ‘Managing the Impact of HIV/AIDS on the Education Sector’, prepared in advance of the African Development Forum (October, 2000) for the UN Economic Commission for Africa, who has drawn from a wide range of
literature and documents from the Departments of Education, Health, and Welfare.

26Many of the questions raised about HIV and AIDS (including some of those posed in the Commonwealth Guidelines) are not possible to answer, except by saying ‘we don’t know – yet’. Some of them are too difficult; others are too new. Still others are old questions, but common wisdom about the answer to them is being tested. The Department of Health has commissioned a thorough review of the impact of HIV/AIDS on the education sector. Initial data has been presented to the Department of Education (ABT Associates, 1999). The full report to the Minister of Education is expected by September 2000. Until then it is necessary to extrapolate impact probabilities from experience elsewhere in the SADC region, and from occasional studies and reports, information on other sectors, demographic analysis, and anecdotal information.

27For these statistics, orphans are defined as children who have lost one or both parents.


29The HIV/AIDS epidemic has progressed more or less in line with model projections during the 1990s. These projections are based on the most recent statistics, using the Metropolitan-Doyle model. The Metropolitan-Doyle model was first published in October 1990, with a view to producing reliable estimates of the progress of HIV/AIDS in South Africa. The model has been extensively used in Southern Africa by many sectors for the past eight years, and has performed well when used in practical applications at the sub-group and general population level. The model is continually reviewed in the light of new demographic and population statistics, as well as interventions which may influence the course of the epidemic and result in changing incidence of infection, morbidity and mortality. The model is able to consider various interventions into the epidemic. These include behavioural changes (increased condom usage, reduced numbers of partners, etc), as well as medical interventions (improved treatment of STDs, vaccinations, treatment/cure of HIV positive and AIDS sick individuals). (Moore & Kramer, undated: 14.)

30Provisional information from Abt Associates, June 2000.

31In the SADC region, skilled workers (educators, health workers and government employees) seem particularly vulnerable to the disease. The incidence of HIV infection among educators is likely to be above that for the population as a whole. Rates as high as 40% have been reported from parts of Malawi and Uganda (UNDP, 1998).

32JTK Associates.

33South Africa’s HIV/AIDS strategy has been driven primarily by the HIV/AIDS and STD Directorate of the Department of Health. Implementation has been the responsibility of co-ordinators in provincial health departments. Nine new provincial administrations, established in 1994/95, were initially characterised by weak administrative and managerial capacity. The capacity and responsibility for HIV/AIDS intervention have been widened across departments and strengthened over the past few years.

34Department of Health and Department of Education (1997/98), Life Skills and HIV/AIDS Education Programme: Project Report. The project is aimed at ensuring that learners could understand sex and sexuality, gender and STDs; identify ways in which HIV/AIDS can be transmitted; identify and mobilise community resources; evaluate sexual practices and respond appropriately and under pressure; accept and learn to live with being HIV+; show compassion to others who are HIV+; and learn how to cope with loss and deprivation in the family and community as a result of HIV/AIDS.

35Funded by a USAID grant. At the time of writing, information was not available on the details of either the strategy or USAID support for this assessment.
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