15

Education

Aim

The aim of the Department of Education is to develop a national framework for the promotion of education and training.

Policy developments

National education policy

Since 1994, the national Department of Education has spearheaded the transformation of the education system. The vision for this transformation centres on providing equal access to lifelong education and training opportunities to contribute to quality of life and a prosperous democracy.

Education is a concurrent function, with shared responsibility between national and provincial government for all levels of education except higher education. The national Minister of Education has overall political and legislative responsibility for education. Executive responsibility for school education, however, rests with provincial governments; these also determine provincial expenditure on education from the equitable share of national revenue allocated to provinces.

The South African Qualifications Authority Act of 1995 established the South African Qualifications Authority, a statutory body responsible for the development and implementation of the national qualifications framework. The framework sets up an integrated national learning system that promotes wider access to and recognition of learning, portability of learning credits and greater mobility of learners.

The National Education Policy Act of 1996 defines the policy, legislative and monitoring responsibilities of the Minister of Education and formalises the relations between national and provincial education authorities. The Act provides the Minister with the power to establish national education policy and to monitor its implementation. It also spells out the consultations to be undertaken prior to the determination of policy and establishes consultative bodies.

The Higher Education Act of 1997 and the Further Education and Training Act of 1999 established the framework for a coordinated higher and further education and training (FET) system. The Acts provide for the establishment, governance and funding of institutions as well as for registration of private institutions and for quality assurance. In 1999 amendments to the Higher Education Act increased national powers for ensuring proper governance of institutions. Certain reforms with regard to the National Students Financial Aid Scheme were also implemented.

Norms and standards for education funding

The South African Schools Act of 1996 provides for a uniform system for the organisation, governance and funding of schools. It unified and deracialised the previously fragmented education system; introduced compulsory education from ages six turning seven to 15, establishes liability for the payment of school fees, and mandates the establishment of democratically elected governing bodies at all schools. In terms of the Act, Government must fund public schools on an

equitable basis to ensure the proper exercise of learners' right to education and to redress past inequalities in education provision.

The South African Schools Act mandates the Minister of Education to determine norms and minimum standards for the funding of public schools. Published in 1998, these came into effect in April 1999, with implementation from the 2000 school year. The Higher Education Act of 1997 and the Further Education and Training Act of 1998 established the framework for coordinated higher and further education and training systems. The Acts provide for the establishment, governance and funding of institutions, as well as for registration of private institutions and for quality assurance.

Other policies

A national admissions policy for public schools and age-grade norms for ordinary public schools were published in October 1998 and came into effect in January 2000. In terms of these norms, learners may only be allowed to enrol in Grade 1 if they turn seven in the course of that calendar year. This will reduce some of the pressure of numbers, address the lack of school preparedness and improve the quality and efficiency of education.

The national policy on HIV/Aids for learners, students and educators was published in August 1999. The policy addresses the following:

- Admission of learners and appointment of educators with HIV/Aids, attendance of learners and students with HIV/Aids, and non-discrimination and equality
- Establishing a safe school environment and prevention of transmission
- Education on HIV/Aids, whereby schools are mandated to implement continuing life-skills and HIV/Aids education programmes.

The broad policy and legislative changes outlined above not only go a long way towards amalgamating and integrating the education and training system but also provide the basis for improving quality and efficiency in the system. The phased reorientation towards outcomes-based education, encapsulated in Curriculum 2005, also meant a significant departure from earlier curricula and teaching approaches.

Tirisano implementation plan

In a wide-ranging policy announcement in July 1999 the Minister of Education acknowledged this progress but concluded that major weaknesses and baggage remain, and that there is indeed a crisis at each level of the system. The following specific aspects were identified:

- Rampant inequality of access to educational opportunities of satisfactory standard
- Low teacher morale in all communities
- A serious crisis of leadership, governance, management and administration in many parts of the system
- Poor quality of learning in many parts of the system.

In response to these challenges, the Minister announced a national mobilisation for education and training under the slogan *Tirisano*, or "working together". Implementation plans have been finalised and launched to take the following nine priorities forward:

- Making provincial systems work by making cooperative government work
- Breaking the back of illiteracy among adults and youths in five years
- Turning schools into centres of community life
- Ending conditions of physical degradation in South African schools
- Developing the professional quality of the South African teaching force
- Ensuring the success of active learning through outcomes-based education

- Creating a vibrant further education and training sector
- Implementing a rational, seamless higher education system
- Dealing urgently and purposefully with the HIV/Aids emergency in and through the education system.

This Budget's MTEF allocation to the Department is R8,3 million for 2000/01 and R8,7 million higher for 2001/02. This increase relates to additional provision for technical examinations, a function that was shifted to the Department in April 1999 under the programme *General and further education and training.* This programme therefore sees an upward adjustment in MTEF allocations. Marginal reprioritisation in favour of *Systems and planning* and *Higher education* and against *Administration* and *Auxiliary and associated services* takes place over the MTEF period.

Expenditure estimates

Table 15.1 Expenditure by programme

	Expenditure outcome			Revised estimate	Medium-term expenditure estimate		
R million	1996/97	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03
Administration	40,2	45,2	39,9	49,7	56,1	54,3	61,2
Systems and planning	20,0	20,0	21,7	26,9	25,5	27,0	30,8
General and further education and training	28,3	467,8	326,3	417,0	361,2	378,9	384,2
Higher education	5 226,2	5 438,4	6 055,0	6 622,6	7 028,4	7 464,3	7 757,8
Auxiliary and associated services	4,7	3,4	26,6	58,0	11,2	11,9	12,4
Departmental vote	**5 319,4**	**5 974,8**	**6 469,5**	**7 174,3**	**7 482,4**	**7 936,4**	**8 246,3**
Public Works [1]	–	–	–	–	–	–	–
Total	**5 319,4**	**5 974,8**	**6 469,5**	**7 174,3**	**7 482,4**	**7 936,4**	**8 246,3**
Change to 1999 Budget estimate	–	–	–	146,1	8,3	8,7	–

[1] *Appropriated on Vote 26: Public Works.*

- *Administration* refers to the overall management of the Department and includes the offices of the Minister, the Deputy Minister and the Director-General.
- *Systems and planning* provides educational policy support services to the Department.
- *General and further education and training* promotes the development, implementation, monitoring and maintenance of national policy, systems and programmes for general and further education and training.
- *Higher education* deals with the planning, development, coordination and management of the higher education system.
- *Auxiliary and associated services* provides services including human resources management, vehicle transport and support to provincial education departments on personnel provisioning.

Table 15.2 Economic classification of expenditure

R million	Expenditure outcome			Revised estimate	Medium-term expenditure estimate		
	1996/97	**1997/98**	**1998/99**	**1999/00**	**2000/01**	**2001/02**	**2002/03**
Current							
Personnel	38,4	44,6	55,0	94,1	105,7	112,7	119,3
Transfer payments	4 769,9	5 243,0	6 090,9	6 672,2	7 021,5	7 481,5	7 788,2
Other	57,5	83,1	66,9	127,8	139,1	141,0	151,6
Capital							
Transfer payments	450,8	599,9	253,4	275,2	214,0	199,0	185,1
Acquisition of capital assets	2,8	4,2	3,3	5,0	2,2	2,2	2,2
Total	**5 319,4**	**5 974,8**	**6 469,5**	**7 174,3**	**7 482,4**	**7 936,4**	**8 246,3**

The education budget is dominated by current transfer payments, which rise from R7 021,5 million in 2000/01 to R7 481,5 million in 2001/02 and R7 788,2 million in 2002/03. The bulk of these transfers (about 94 per cent) comprise transfers to universities and technikons and a transfer of R443,5 million to the National Student Financial Aid Scheme. The amount available for departmental services, including spending on personnel expenditure and other operational costs, comprises R187,6 million. Current transfers also included a R202 million conditional grant to provincial education departments for financial management and quality enhancement in education.

Personnel spending increases from R94,1 million in 1999/00 to R119,3 million in 2002/03, while capital spending, mostly transfers to higher education institutions for capital purposes, continues to decline and will, by the end of the period, be less than half its 1996/97 value. The large increase in personnel expenditure in 1999/00 is due to the function shift of the National Film Library and the examinations section from the Gauteng Education Department.

Programme 1: Administration

Table 15.3 Programme expenditure

R million	Budget estimate	Adjusted appropriation	Revised estimate	Medium-term expenditure estimate		
		1999/00		**2000/01**	**2001/02**	**2002/03**
1999 Budget	52,3	49,7	49,7	57,6	60,9	–
2000 Budget	**–**	**–**	**–**	**56,1**	**54,3**	**61,2**
Change to 1999 Budget estimate	–	(2,6)	(2,6)	(1,5)	(6,6)	–

Administration includes expenditure on the Offices of the Minister, Deputy Minister and the Director-General to enable policy formulation and overall management of the Department. The programme is also responsible for rendering centralised administrative and office support, managing departmental personnel and financial administration, determining working methods and procedures, and exercising control.

The medium-term estimates have been revised marginally to R56,1 million in 2000/01 and R54,3 million in 2001/02.

Programme 2: Systems and planning

Table 15.4 Programme expenditure

R million	Budget estimate	Adjusted appropriation	Revised estimate	Medium-term expenditure estimate		
	1999/00			2000/01	2001/02	2002/03
1999 Budget	233,5	26,9	26,9	296,2	308,2	–
2000 Budget	–	–	–	**25,5**	**27,0**	**30,8**
Change to 1999 Budget estimate	–	(206,6)	(206,6)	(270,7)	(281,2)	–

Systems and planning provides educational policy support services to the Department. These functions include the following:

- Services concerning policy support, education and training financing, and information systems
- Coordination of intergovernmental relations in education
- Maintaining international relations in education
- Legal and legislative services
- Communication and related services.

The significant reduction in the medium-term estimates from around R30 million in the 1999 Budget is nearer R25 million and this reflects the shift of the conditional grant for financial management and quality enhancement in provincial departments to the *General and further education and training* programme.

Outputs and service delivery trends

Table 15.5 Systems and planning: Key activities and outputs

Key activities	Outputs
Education planning	
Analyse, develop, plan and advocate policy for the education sector	Support and monitor implementation of norms and standards for school funding
	Inputs to MTEF sectoral review process for education: expenditure trends in provincial education, service delivery indicators
Develop and maintain financial policy concerning the education sector	Maintenance and development of the education information management system and comprehensive database for all public schools
Promote the development and operation of education and training information systems	Provincial support and dissemination of information
	Development of a further and higher education management information system
Systems and coordination	
Coordinate education and training matters between national and provincial governments among state departments	Manage business review of learner support material provisioning and monitor provincial provisioning
Develop and maintain international relations in education and training	Ratification of SADC Protocol on Human Resource Development
	Facilitate development cooperation agreements in education and training field
Promote a culture of learning, teaching and service	Secretariat to South African National Commission for Unesco
	Educational broadcasting programmes such as Yizo Yizo
	Role models through Miracles in education project
Communication and liaison	
Promote communication and related services to the Department	Communication strategies
	Press conferences and media releases

Slow disbursement of the R200 million additional allocation for learner support materials approved in the Adjustments Estimate for 1998/99, of which R75 million was rolled over to the following year, points to inefficient procurement processes at the provincial level. The 1999 review of provincial procurement systems confirmed problems with the management of the book retrieval system and procurement and distribution in most provinces. A joint task team of the Departments of Education and State Expenditure was appointed to monitor procurement processes for 2000. The team identified key concerns including late commencement of selection processes, problems with tendering processes, insufficient monitoring of the procurement and distribution chains, and insufficient funds. Provision for textbooks had, however, improved significantly from R192 million in 1998/99 to R580 million for 1999/00.

Policy developments

National norms and standards for school funding are being implemented, ranking schools on the basis of the relative poverty of the school community and the condition of the school. Non-educator spending is targeted according to the ranking to favour poorer communities and ensure redress within the education system. The norms also regulate the funding of independent schools, which are to receive a proportion of the subsidy in respect of public school learners, depending on the school fees charged at the school. The norms provide for increased decentralisation of financial management by allocating greater responsibility to school governing bodies that have the necessary capacity to manage their recurrent allocations. An audit towards the end of 1999 identified those provinces that are not ready to implement the policy; the national department has implemented an emergency intervention plan. Capacity building for implementation of the norms is supported by European Union funding.

Programme 3: General and further education and training

Table 15.6 Programme expenditure

R million	Budget estimate	Adjusted appropriation	Revised estimate	Medium-term expenditure estimate		
		1999/00		2000/01	2001/02	2002/03
1999 Budget	109,4	467,0	417,0	82,0	85,0	–
2000 Budget	–	–	–	**361,2**	**378,9**	**384,2**
Change to 1999 Budget estimate	–	357,6	307,6	279,2	293,9	–

The *General and further education and training* programme promotes the development, implementation, monitoring and maintenance of national policy, systems and programmes for general and further education and training. With regard to general education, areas of coverage include public schools, early childhood development, adult education and training, and learners with special learning needs. Responsibility also extends to the development of further education and training policies on curriculum, education technology and quality assurance.

The upward adjustment of the estimates is due to the inclusion of rollovers from previous years and the shift of the 1999/00 conditional grant to this programme. Rollovers from 1998/99 totalled R190 million and included R75 million from the textbook allocation, R50 million from the conditional grant for financial management and quality enhancement, and R24 million from the national schools building programme.

The increase in the medium-term estimates reflects the inclusion of the conditional grant to provincial education departments. This grant increases from R202 million in 2000/01 to R213 million in 2001/02 and R224 million in 2002/03. In addition, R70 million is earmarked on

the national department's budget in each of the three years for national expenditure to support provincial processes.

Outputs and service delivery trends

Table 15.7 General and further education and training: Key activities and outputs

Key activities	Outputs
General education and training	
Early childhood development	Develop policies and implementation programmes for the reception year
	National Early Childhood Development Pilot Project
School education	Age-grade norms under the South African Schools Act
	Support for implementation of Curriculum 2005
Adult education	National and provincial plans for adult education and training, particularly adult basic education and training
Learners with special learning needs	Consultative Paper on Education for Learners with Special Education Needs
	Further development of learning programmes in sign language
Further education and training	
Plan and coordinate further education and training development and support	Appoint National Board for Further Education and Training and provide secretarial support to the Board
	National Strategy for Further Education and Training, 1999–2001
Develop and support further education and training qualifications	Develop national curriculum framework for further education and training and coordination
Develop policy and manage systems concerning further educational assessment	National policy on the conduct of senior certificate and technical college examinations
	Monitor examinations
	Conduct five technical college examinations per year
	Coordinate information and publications on examinations
National Institute for Lifelong Learning and Quality Assurance	
Develop, evaluate and maintain a quality assurance system	Establish general system for further education and training quality assurance
	Quality assurance policy framework
	Monitoring and evaluation instruments
Promote open and lifelong learning through the Centre for Educational Technology and Distance Education	Research and development work on technology-enhanced learning, school libraries, educational broadcasting and distance education
	Provide educational media through the National Media Library
Policy for the promotion of open and lifelong learning through the National Centre for Curriculum and Research Development	Research and development projects
General and further education and training development support	
Policy support for general and further education and training projects	Negotiate and manage conditional grants, monitor and coordinate donor funding

The conditional grant for financial management and quality enhancement is used to assist provinces in the following programmes:

- Education management and financial management development
- Quality assurance capacity and systems
- Culture of Learning, Teaching and Service Campaign
- Professional development of teachers for Curriculum 2005
- District Development Project to strengthen and improve management.

After problems in 1998/99 with the disbursement of the allocations, which were late in becoming available, spending and implementation of activities are progressing well.

Policy developments

Policy development is targeted to three areas, namely early childhood development, adult basic education and training, and education for learners with special education needs. A White Paper on each field is in preparation and will direct learner, educator and system performance.

The joint report of the National Commission for Special Needs in Education and Training and the National Committee for Education Support Services served as the basis for a consultative paper on education for learners with special education needs. Responses will be incorporated in a White Paper targeted for release in the current legislative programme. The policy focuses on the establishment of an education and training system that ensures that learners with severe organic and medical disabilities are adequately accommodated in all bands of the education system. Another focus is appropriate educational interventions for learners with learning difficulties related to, among other things, socio-economic conditions. Strategies for implementation, resourcing strategies, an audit of special schools and an advocacy strategy also received attention.

Programme 4: Higher education

Table 15.8 Programme expenditure

R million	Budget estimate	Adjusted appropriation	Revised estimate	Medium-term expenditure estimate		
		1999/00		2000/01	2001/02	2002/03
1999 Budget	6 621,5	6 622,6	6 622,6	7 026,0	7 460,4	–
2000 Budget	–	–	–	**7 028,4**	**7 464,3**	**7 757,8**
Change to 1999 Budget estimate	–	1,1	1,1	2,4	3,9	–

The *Higher Education* branch develops and implements appropriate policies and legislation to assist in "creating and maintaining a sustainable higher education and training system of high quality".

After fairly rapid growth up to 1999/00, the allocation grows by slightly more than the inflation rate over the MTEF. The allocation to the National Student Financial Aid Scheme grows by 13 per cent in 2000/01, from R390 million to R443,5 million.

Outputs and service delivery trends

Table 15.9 Higher education: Key activities and outputs

Key activities	Outputs
Planning and management	
Plan and monitor the national higher education system	Develop national higher education plan in conjunction with the Council on Higher Education, develop a new programme-based funding framework
Coordinate the development of higher education colleges	Incorporate colleges of education into the higher education system
Render management support services to higher education institutions	Transform governance structures of institutions; provide institutional support for historically disadvantaged institutions; manage financial disbursements to higher education institutions and to the National Student Financial Aid Scheme
Development support	
Liaise with constituencies in higher education and provide support	Render policy and development support to the higher education system
Register private higher education institutions	Conduct research into sector and the definition of criteria for registration

Colleges of education are gradually being incorporated into the higher education sector under the national Ministry. Five provinces have completed their incorporation proposals: Gauteng, Mpumalanga, North West, Northern Cape and Western Cape. Consultations were held with the Departments of Health and Agriculture on the incorporation of nursing and agricultural colleges under their control.

Although the total subsidy to higher education institutions increases moderately in 2000/01, the aggregate funding level relative to the formula amount drops slightly from 64,7 per cent to 63,4 per cent. Contrary to the trend in previous years, transfers to universities increase by 6,6 per cent from R4,48 billion in 1999/00 to R4,78 billion in 2000/01, whereas the allocation to technikons rises by only 3,0 per cent from R1,74 billion in 1999/00 to R1,79 billion in 2000/01. A redress allocation of R30 million is included in the total allocation to universities and will be used to fund academic development programmes on the basis of competitive bids. In previous years, the redress allocation was used to assist with the stabilisation of universities with financial and management problems.

Rapidly growing student numbers and relatively slow growth in subsidies put many institutions under financial pressure. Recent evidence, however, indicates that growth in student numbers has stabilised, as shown in Table 15.10.

The allocation to the National Student Financial Aid Scheme rises from R390 million in 1999/00 to R443,5 million in 2000/01. Since 1994, almost R1,7 billion has been allocated to students; this translates into 264 402 awards.

Policy developments

In line with the Education White Paper 3, *A Programme for the Transformation of Higher Education*, several features were introduced to establish a single coordinated system encompassing, among other things:

- a national and institutional planning process linked to a new funding formula, to steer the system to meet national educational goals
- democratisation and reform of governance structures.

It is anticipated that the main elements of a new funding framework and formula will be available in 2000.

The Higher Education Amendment Act of 1999 amends the Act of 1997. The amendments empower the Minister to address failures in governance at institutions by appointing an administrator to manage institutions that are either dysfunctional or where there is evidence of financial or other maladministration.

The National Student Financial Aid Scheme Act of 1999 provides for the accountable and effective management, governance and administration of the Scheme. The Act converts the Tertiary Education Fund of South Africa, a Section 21 company that operates the loan and bursary scheme, into a statutory agency that is administratively independent but governed by a Board appointed by the Minister. The Act provides the scheme with stronger instruments to enforce repayment of loans, such as access to names and addresses of employers through the South African Revenue Services and listing defaulters on a list of defaulting debtors.

Table 15.10 Allocations to universities and technikons and enrolment numbers

Institution	1999/00 Allocations (R million)	2000/01 Allocations (R million)	1998 Enrolment	1999 Enrolment
Universities				
Cape Town	305	337	15 758	15 378
Durban-Westville	146	164	8 859	a
Fort Hare	101	91	3 490	2 890
Free State	193	198	9 787	10 014
Medunsa	162	158	3 689	3 501
Natal	320	355	16 288	15 426
North West	89	101	11 203	6 215
Port Elizabeth	112	145	7 430	a
Potchefstroom	176	219	14 342	12 629
Pretoria	539	584	25 576	25 865
Rand Afrikaans	221	251	22 011	20 798
Rhodes	89	102	5 047	5 160
Stellenbosch	299	333	15 822	17 532
The North	186	195	10 607	10 015
Transkei	110	109	5 656	4 537
South Africa (Unisa)	427	467	113 501	103 389
Venda	98	89	5 737	5 016
Vista	243	252	28 327	26 063
Western Cape	168	153	10 832	a
Witwatersrand	333	339	16 916	16 497
Zululand	101	105	5 537	5 014
Redress	60	30		
Total	**4 479**	**4 777**	**350 885**	
Male			159 351	
Female			191 534	
Technikons				
Border	62	67	3 312	4 025
Cape	118	128	10 130	9 916
Eastern Cape	61	59	3 768	3 461
Free State	70	69	6 147	6 026
M L Sultan	127	113	9 800	8 823
Mangosutho	76	74	5 551	5 690
Natal	122	120	10 052	9 141
North West	42	56	3 910	4 021
Northern Gauteng	96	111	8 934	9 273
Peninsula	108	117	7 788	8 317
Port Elizabeth	94	97	8 646	8 646
Pretoria	224	253	21 442	22 387
South Africa	256	229	70 145	65 711
Vaal Triangle	138	141	13 519	13 571
Witwatersrand	147	159	11 683	11 112
Total	**1 741**	**1 793**	**194 827**	**190 120**
Male			108 889	86 670
Female			85 938	103 450

a *Information outstanding.*
Source: Department of Education

Programme 5: Auxiliary and associated services

Table 15.11 Programme expenditure

R million	Budget estimate	Adjusted appropriation	Revised estimate	Medium-term expenditure estimate		
		1999/00		2000/01	2001/02	2002/03
1999 Budget	11,5	58,0	58,0	12,3	13,1	–
2000 Budget	–	–	–	**11,2**	**11,9**	**12,4**
Change to 1999 Budget estimate	–	46,5	46,5	(1,1)	(1,2)	–

In addition to miscellaneous items, this programme includes the Chief Directorate: Human Resources, which has four functions: human resources management, labour relations management, service dispensation matters and educator-in-service development.

The allocation in the 1999 Adjustments Estimate for this programme includes R35 million from the conditional grant to the Education Departments Support Unit to support provincial education departments, and an increased allocation to the Human Resources division for in-service training of educators.

Table 15.12 Auxiliary and associated services: Key activities and outputs

Key activities	Outputs
Education human resource management	
Develop and manage plans for the provisioning, utilisation and employment conditions of educators	Policy framework on Education Human Resources
	Review salary and grading system for educators
Manage labour relations concerning educators	Participate in negotiations in the Public Service Coordinating Bargaining Council
	Conduct negotiations in Education Labour Relations Council
Education human resource development and equity	
Develop education management and governance capacity	Develop education management programme
	Plan for utilisation of conditional grant
Promotion of educator capacity building	Research and analyse teacher needs and existing programmes
	Support implementation of learning programmes
Gender equity	
Monitor, evaluate and coordinate gender equity	Monitor progress with gender equity and support programmes to address gender equity
Education departments support unit	
Render support to the provincial education departments	

Over the last few years, the Education Labour Relations Council has been transformed to conform to the Labour Relations Act of 1995 and has been aligned with the establishment of the Public Service Coordinating Bargaining Council. While negotiations threatened to break down around the dispute on post provisioning in 1998, a mature and responsible bargaining set-up now prevails. Bargaining processes resulted in key performance-related agreements, including job descriptions for educators, workload agreements and a system for educator appraisal. Negotiations also resulted in balanced agreements about:

- post provisioning
- the procedure for rationalisation and redeployment
- advertising and filling of posts
- the involvement of educator unions in the national and provincial budget process.

The Education Labour Relations Council is also currently reviewing the salary and grading system for educators.