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Equity, access and quality in basic education: a review

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Introduction

The democratic government which came into being in South Africa in 1994 has shown its commitment to Education for All, by ensuring equitable and universal access to meaningful learning opportunities. There has been significant progress towards equity, equality and redress in post-apartheid South Africa, and yet a sobering reality, noted by the National Planning Commission, is that an estimated 48% of the population live on less than 2 dollars a day, and, at 0.67, the Gini coefficient is the highest in the world (National Planning Commission, 2011). In 2014, the unemployment rate was 24.3% or 34.6% discouraged 'job seekers'. Among the unemployed, long term joblessness is at 66%, indicating how exclusion from the labour market undermines skills development. Unemployment for those in the 15 to 25 age group, remains a staggering 48.8 % (Budget Review, 2015).

In recent years, key education indicators have shown that mastery of basic competencies is at a very low level, leading to much policy and research, including that of the Consortium for Research on Equity, Access and Transitions in Education (CREATE), which formulated the notion of meaningful access to schooling (Lewin and Wang, 2011). This expanded on Morrow's notion of epistemological access (2006). In response, much attention has been given to developing numeracy and literacy skills (Department of Basic Education 2011a; Department of Education, 2009) including some specific strategies focussing on specific sectors such as the Youth into Science Strategy 2006 (Arends, *et al*., 2014). The overriding objective of all these plans has been to improve the quality of educational delivery, particularly for historically under-served groups, and to achieve steady improvements in educational outcomes that will support other areas of growth and development.

This paper critically assesses access, equity and quality as key indicators of progress towards achieving the goals of post-apartheid education reform. It argues that despite improvements in both quality and practice, and significant resource allocation, educational access in South Africa remains incomplete in terms of attendance, limited in terms of grade progression, unsatisfactory in terms of the age grade norms, poor in terms of quality and inefficient in terms of learning outcomes. Equipping educators with better skills will significantly enhance cognitive skills amongst learners. Finally a much more explicit, proactive and equity driven approach is needed, which prioritises the neediest and most marginalised, so that we have an inclusive education system, based on the principles of social justice and fairness.

The policy context

Twenty years after the demise of apartheid, labour demand continues to be greater among those who are highly educated, with the long-term unemployment rate for degree-holders at only 4.2%. This is nearly eight times lower than the mean unemployment rate for individuals with only Grade 8–11 schooling. Unemployment rates for those that have completed Grade 12 and for Grades 0 to 7 are 25.9% and 23.8% respectively. The South African labour market is systematically oversupplied with those that have relatively low levels of education. The responsiveness of the labour market to certain education levels poses a number of key issues. Firstly, unemployment with regard to those with only a high-school education is significant, as they make up most of the unemployed population. The long-term mean unemployment rate for the Grade 8 to 11 cohort is 30.9%, while those who have qualified with a matric or Grade 12 also show a significant level of unemployment at a mean of 25.9% (Bhorat, Cassim and Tsheng, 2015). There are two aspects that may explain the high levels of unemployment observed. Firstly, high-school enrolment over the past 20 years has meant that more young people are entering the labour force and that the labour market is unable to absorb the numbers. Secondly, the quality of school-leavers' education has not afforded them vast employment opportunities. In terms of schooling, research shows that poorer children enter school with a 'cognitive disadvantage', because they have not had access to the resources and stimulation that well-off children enjoy (Van der Berg, Burger, Burger, De Vos, Du Rand, Gustafsson, Shepherd, Spaull, Taylor, VanBroekhuizen and Von Fintel. 2011).
South Africa has a quasi-federal system, with nine provinces. The provincial

governments have legislative responsibility for schooling. The country has a population of 47.9 million of whom 79.6% are black African. Just over 15 million children are of school going age; 12 million learners between the ages of 5 and 19, of whom 49.8% are girls, are at school. Education is compulsory from 7 to 16 or to the end of Grade 9. The schooling system is divided into the primary (Grades 1 to 7), junior secondary (Grades 8 and 9) and senior secondary (Grades 10 to 12) sectors. In 2010 there were, including 1,086 independent schools, 26,065 ordinary schools (as distinct from schools for learners with special needs) in South Africa. There were about 12 million learners in public ordinary schools, 352 000 learners in independent ordinary schools and a total of 394 000 teachers (Department of Education, 2009).

The attendance of children aged 5 increased from 40% to 62% and of children aged 6 from 70% to 84% (Government Gazette, 2010). The percentage of 7–15 year-olds attending schools improved to 98% by 2011, and participation by 16 to 18 year-olds has also increased steadily, to 85% by 2011 The government aims to achieve full participation of 5 year-olds in Grade R pre-school education by 2014. However, while preschool coverage has improved, good quality provision is uneven, with a lack of qualified teachers in grade R classes. The independent or private schooling system, which incorporates institutions charging a very wide range of fees, comprises about 2.8% of the overall schooling system. Its coverage extends to poorer learners in areas where there is insufficient state provision (National Planning Commission, 2011).

Education ministers since 1994 have contributed to education reform, each with a distinct emphasis. Minister Bhengu (1994–1998) focussed on developing frameworks to address the inequalities inherited from apartheid, at the same time creating a broad based vision for the education system. The second period, overseen by Minister Kader Asmal (1999–2004), broadened policy to include areas not previously focussed on, such as equality and social justice, and inclusive education with a specific focus on early childhood and special needs education. The third phase, under Minister Naledi Pandor (2004–2008), marked a distinct departure from previous initiatives. With questions of access on the way to solution, attention turned to quality. Continued underperformance in basic literacy and numeracy led to the Foundations of Learning campaign (2008–2011), emphasising a back to basics approach.

Since 2009, a fourth phase has been under way, with new policies emerging and significant changes in how the education system is managed on a national scale. The national Department of Education has been reorganised into two departments: The Department of Basic Education (DBE) (headed by former Gauteng Executive Council Member for Education, Angie Motshekga) with responsibility for primary and secondary education as well as early childhood development centres and the Department of Higher Education and Training (DHET), under Blade Nzimande, which oversees technical and vocational training, adult education and tertiary education.

During this fourth phase, several trends can be identified (Sayed and Motala, 2012). These include

1. **Setting output targets**: The action Plan 2014: Towards the Realisation of Schooling 2025 established key output goals, supported by guidelines which advocated a more utilitarian approach to education. Ten of its output goals focussed on improving numeracy and literacy, in a clear response to poor ongoing learner performance in the Grade Three and Grade Six national assessments and in the regional SACMEQ and international TIMSS and PIRLS surveys. There is also a strong focus on regular testing, in the form of Annual National Assessments (ANAs) which test the quality of language and mathematics learning in all public and government-subsidised independent schools.

2. **Introduction of curriculum and assessment policy**: The outcomes-based education (OBE) system, introduced incrementally since the late 1990s, has come under critical scrutiny. In 2009, the outcomes-based Revised National Curriculum Statement was reviewed by a ministerial committee, and a new curriculum document, the Curriculum and Assessment Policy (CAPS), came into effect in January 2011, signalling the end of a 14-year attempt to focus teaching and learning primarily around outcomes rather than processes or inputs. Teachers as agents of change: Policy has begun to give systematic attention to the notion of teachers as agents of change. On 5 April 2011 the national departments of education jointly launched the Integrated Strategic Planning Framework for Teacher Education and Development in South Africa, which aimed to improve both initial teacher education and continuing professional teacher development, with training for CAPS a specific priority. The establishment of the National Education Evaluation and

Development Unit in 2011 indicated a more dedicated focus on the monitoring and supervision of teachers.

3. **Focus on skill development**: The separation of basic education and higher education at national departmental level has led to more focussed attention to skills development as evidenced in the National Skills Development Strategy III 2011–2016 and the Green Paper for Post-School Education and Training. The Sector Education and Training Authorities (SETAs) were transferred by Presidential Proclamation 56 of 2009 (Department of Higher Education and Training, 2011) from the Department of Labour to the DHET, a move intended to improve coherence across the university and college systems (Department of Education, 2010).

4. **Establishing norms and standard for funding**: Finally, a number of amendments have been made to the National Norms and Standards for School Funding (NNSSF), allowing for an expansion in the number of no-fee schools to 60% of all schools and for the widening of school feeding schemes. The most recent NNSSF amendment came in 2011, allowing schools to apply for compensation for fee exemptions each year, based on a formula determined by the DBE. This is a clear pro-poor development, though even more substantial adjustments will be required if current inequities are to be fully addressed. Currently close to 20,000 schools benefit from the no-fee policy. Another important pro-poor initiative is the National School Nutrition Programme (NSNP), which by 2012 provided a total of 8,756,893 learners in 20,905 primary and secondary schools with a funded lunch (Statistics SA, 2013).

In 2015, the proposed allocation to basic education will reach R650 billion, and continue to grow at an annual average of 6.3% .From a high point of 6.8% of GDP in 1998, education spending now comprises 5.3% of the Gross Domestic Product (GDP) and about 17% of consolidated government expenditure, making education the largest category of government disbursement. In comparison to other developing countries, education spending in South Africa as a proportion of GDP is high although it is less than the UNESCO benchmark of 6%. It has been noted that these relatively high levels mainly reflect expenditure on educator salaries with spending on other inputs being below international norms (Department of Basic Education, 2010; Department of Basic Education, 2012). In 2015, 17% of the total expenditure was in educator salaries.

There have been improvements in funding equity between provinces and between schools as subventions were impacted by pro-poor funding norms. However questions continue about the impact of this funding shift, with some arguing that the impact has been less marked than expected in terms of real education opportunities and education quality. In particular the quintile system has come under scrutiny, with evidence that the ranking system is not an adequate measure of the socio-economic status of learners in schools, often disadvantaging the funding base of schools in which there are a larger proportion of poor learners (Wildeman, 2008, Sayed and Motala, 2012). Kanjee and Chudgar (2009), using empirical evidence, show that the quintile system is not an effective benchmarking measure, and that schools in the middle quintiles (Q3 and Q4), are often worse off than quintile 1 schools.

South Africa's commitment to the Millennium Development Goals is premised on the right to basic education enshrined in its Constitution (RSA 1996: Section 29(1)). Unlike a number of other developing countries, in South Africa there is near universal access to formal public schooling to the end of the compulsory phase (Perry and Arends, 2003; Statictics SA, 2006; Chisholm 2011). Estimates of a gross enrolment ratio of 99% in primary grades and 87% in secondary grades place South Africa above what are seen to be feasible targets for middle-income countries (Lewin and Wang, 2011). However, while South Africans enjoy substantial physical and structural access to schooling, this does not guarantee that learners have equal experience of or access to quality education. The specific policy challenge for meaningful access in South Africa is less one of enrolment in formal public schooling and more one of retention, attendance, achievement and completion on schedule for age, all of which contribute to quality outcomes.

How much do children learn?

In the Department of Education's systemic evaluation of Grade 6 in 2005, learners obtained a national mean score of 38% in Language, 27% in Mathematics, and 41% in Natural Science (Department of Education, 2008). Eight years later, the results of the 2013 Annual National Assessments show little improvement. In the latest assessment of almost 6 million primary school learners , Grade 3 learners achieved an average of only 35% for literacy and 28% for numeracy, while Grade 6 learners managed 28% for languages and 30% for mathematics (Department of Basic Education, 2013,). International

tests such as Monitoring, Learning and Achievement (MLA) administered to Grade 4 in 1999, the Southern and Eastern African Consortium for Monitoring Education Quality (SAQMEC) written by Grade 6 learners in 2005, the Trends in International Mathematics and Science Study (TIMMS) administered to Grade 8 learners in 2003 and 2009, and the Progress in International Reading Literacy Study (PIRLS) conducted with Grade 5 learners in 2006, suggest that South African schools are among the worst performers in Mathematics and Literacy in comparison to their southern and eastern African counterparts (Bloch, 2009). In the 2011 PIRLS test, 43% of South African learners were not able to reach the low international benchmark (Howie, *et al*., 2012). SAQMEC III (2011) focussed on education inequality, and noted that the poorest 20% of learners in South Africa perform far worse than their peers in other African countries. In the fifteen countries in the region, the poorest learners in South Africa are at 12th place for reading, and 14th for reading.

More recent research which reviews 20 years of TIMMs data, suggests that although South African learners were acquiring mathematics and science knowledge, they were doing so at a slower pace than learners in other countries. Therefore, children were learning, but the amount that they were learning in a given year was far below international norms. Most striking though, was that three quarters of South African learners had not acquired the minimum set of mathematical or science skills by Grade 9. A problem that persists in South Africa, and is specifically relevant to mathematics and science, is that emphasis needs to be placed on the fundamentals of instruction in the earlier grades, to reduce the large numbers of learners who lack the basic knowledge of mathematics and science on Grades 8 and 9. As the authors of the review note "it is worrying that these learners are stuck at the shallow end of skills acquisition" (Reddy, *et al*., 2015). Earlier research has also noted the absence of prerequisite skills continues to be one of the main barriers to learner achievement.

The Diagnostic Report (National Planning Commission, 2011) notes that apart from a small minority of learners who attend former-white schools and a small minority of schools performing well in largely black areas, the quality of public education remains poor. Learners in historically white schools perform better, and their scores improve with successive years of schooling. In contrast, in the majority of schools with black learners, learner scores start lower, and show little improvement between grades 3 and 5. Where there has been some improvement as measured by the pass rate – 70% – of those who

sat the 2011 matriculation examination, only 23% achieved a university entrance pass (Department of Basic Education in National Planning Commission, 2011).

In the matric class of 2013, there were 562 112 full-time candidates, of whom 439 779 passed, yielding a matric pass rate of 78.2%. But how many pupils were there to begin with? Spaull (2011) looking at the 2013 grade 12 cohort, notes that there were 1,111,858 pupils in grade two (in 2003), 1,094,189 in grade 10 (in 2011) – but only 562 112 in grade 12 (in 2013). This suggests that 549 746 , dropped out of the school system, along the way.

Inequalities in learner achievement

Disaggregated results of 2005 assessment varied markedly between provinces and among quintiles. Across grades 1 to 6, learners in quintile five schools received scores 10–15% higher than their counterparts in other quintiles. Van der Berg (2010) has argued that inequalities in schooling outcomes are manifest in subsequent incomes, perpetuating current patterns of inequality. While poverty is often related to education outcomes, and achievement is strongly correlated with learner socio-economic status, recent research indicates that the effectiveness of the schools in which the learners are located is an important factor (Spaull, 2011). Other research also shows that high performing schools can contribute significantly to learning opportunities for poor learners. Taylor and Yu (2009), controlling for learner and school socio-economic status, demonstrate that African language learners in historically white schools out-perform those in historically black schools.

The achievement of equity has to be qualified since there are limits to how far education expenditure can be redistributive, since teacher salaries are based on qualifications and experience, and better qualified and more experienced teachers tend to be present in the better off schools. Sayed and Ahmed (2011) suggest that while for the state, equity/quality is conceptualised in a simple input-output model, it is in reality far from clear how these processes converge and diverge at the policy level and whether both are being addressed. The failure to come to a clear conclusion on the development of infrastructure and on minimum norms and standards for schools illustrates that much greater investment is required if the state's equity interventions are to be meaningful. Moreover, social equity and education equity need to be

addressed simultaneously, so that the low quality of education offered in poor communities does not continue to perpetuate their exclusion. Important progress is being made through the delivery of social grants (Bhorat and Cassim, 2013), which address poverty and inequality: Patel (2013) argues that there are real long term benefits to this social investment. There should be an attempt to treat educational and social provision as an integrated platform for an assault on poverty and underdevelopment.

Recent research (Reddy, *et al.,* 2015) shows that better off learners an advantage over children who were poor, although results for quintiles 1 to 4 were very similar. This pattern is in line with earlier studies of South African education conducted for different phases of the schooling system (Van der Berg 2005, 2008). In contrast, quintile 5 schools achieved results that were comparable to results for independent schools. Resonating with earlier research (Motala and Dieltiens, 2011), age and quintile rankings had different results depending on socio-economic status. Children from more affluent schools and independent schools were younger than children from poor schooling environments. This age differential seems to point to higher levels of grade repetition among learners attending resource-poor schools.

Curriculum delivery and reform

Curriculum 2005, which fundamentally shifted the content and pedagogy of the old syllabus-based system and introduced outcomes-based education, required substantial adaptation by role players, not least by the government officials implementing it and the teachers teaching it. However, its complex terminology, its lack of alignment with the orientation of learners and skills of teachers and its poor implementation support required a decade of revision and gradual introduction into all phases of schooling. The new Revised National Curriculum Statements (RNCS) give more emphasis to basic skills, content knowledge and grade progression, and combine a learner-centred curriculum requiring critical thought and emphasising democratic values with an appreciation of the importance of content and support for teachers (Motala and Dieltiens 2011). It also aims to reduce the administrative load on teachers, and to provide guidance and consistency of approach for teachers.

The NEEDU report (2013) notes that the problems of absenteeism, late coming and disruption to the timetable still persist, and that the role of school

leadership is critical for efficient time management and supporting a culture of teaching and learning. There has also been a more distinct focus on assessment in Curriculum 2005. Quality assurance, certification and exit points, and control over norms and standards for curriculum and assessment, were important measures that complemented curriculum changes. Chisholm and Chilisa (2012) note that while Botswana and South Africa both adopted outcomes based curricula, they differ considerably in the content and results of the change. The biggest contrast between the two systems was that while in the curriculum model in Botswana learning and assessment were heavily aligned, in South Africa there was great emphasis on various forms of continuous assessment to support a relatively underspecified curriculum. Since 2008, the South African government has focussed more systematically on national tests, aligning curriculum and assessment more carefully.

Recent research has focussed more sharply on classroom practice. In the CREATE numeracy tests, learners performed way below the levels expected of them (Pereira, 2010). Prior learning for the majority of learners was poor, i.e. they were not on the expected level for their grade, and specific numeracy outcomes which required deeper analytical skills were poor. There are serious gaps in the pedagogical content knowledge related to many learning areas including Mathematics in primary schools. Attention has increasingly turned to teacher skills and pedagogy. The content knowledge of teachers, in particular in mathematics and English, tested in SAQMEQ111 showed low levels of achievement particularly in more complex topics in mathematics which had higher cognitive demands (Taylor, 2011). Chisholm and Carnoy (2012) identify a complex set of interrelated variables related to a teacher's knowledge and ability to teach as contributing to differences in learner performance across Botswana and South Africa.

Patterns of progression and school delays

Most learners in South Africa enrol in and complete primary education, despite numerous barriers to success, and even though substantial early childhood education and pre-schooling provision remain to be achieved. A negligible percentage of children of school-going age have never been to school, approximately 4% of learners drop out before completing primary school (Grade 7), and 92% of learners finish basic education (Grade 9) (Department of Education, 2008). Girls also persist longer through the higher

grades, unlike in a number of other developing countries. However, net enrolment rates drop significantly after Grade 3, suggesting that many learners fall behind age-grade norms. In addition significant numbers of children take more than nine years to complete Grade 9 (Deacon and Dieltiens 2007). Distinctive features of the South African context are 'school delays' (Hallman and Grant, 2004), slow progression (Anderson, 2005) and differential and inequitable access to public schooling (Motala 2006). What is clear is that patterns of progression are an increasingly important predictor of learning outcomes.

As in a number of other developing countries, massification of education has not led to an improvement in education quality. While it is true that fiscal resource inputs are not the only means to achieve the desired educational outcomes, they do, however, have an effect on learner performance. Fiscal resources do not necessarily translate into scarce real resources (qualified teachers and school management) required to improve school performance, and even where resources are available, their effective utilisation is not guaranteed. Nonetheless, according to Van der Berg (2007), equity of educational outcomes requires both well-targeted fiscal expenditure and efficient schools.

The 2011 Carnoy Chisholm study showed that teachers in the North West taught only 52 of the 140 daily lessons scheduled for the year (40%) compared with 78 in Botswana (60%). Given that unwarranted teacher absenteeism in South Africa is unacceptably high (particularly in certain parts of the school system) the department should be encouraged to clamp down on negligence.

An enabling infrastructure

Home support for learning reflects the racially divided and class stratified nature of South African society, with poorer parents lacking the time and cultural capital to support their children's education adequately and middle class parents more likely to encourage learning and to send their children to higher performing schools. And yet school-going is highly valued by parents, to the extent of making the best of what one has, or keeping one's child in a school one does not like but which is better than no school at all (Luxomo and Motala, 2012).

Poor children have limited access to reading material in their homes. Usually, their parents have lower levels of education and they often live in communities that lack public libraries or learning centres. Research suggests that children from impoverished homes in South Africa begin school at a distinct disadvantage, perform systematically worse at school and have fewer career opportunities beyond school (Branson and Zuze, 2012). Early patterns of disadvantage may remain if not addressed appropriately.

One potential area of improvement is in the school infrastructure. Schools in South Africa vary with respect to level of infrastructure and resources. There are often vast differences between communities where schools are situated. Many schools are located in areas with high levels of poverty and unemployment and have to contend with a lack of basic resources. Although the presence of modern facilities cannot guarantee that children will learn better, it is absolutely critical that basic services are in place. Some South African schools are already equipped with modern facilities but many school facilities remain inadequate. According to the National Education Infrastructure Management Systems Report (Department of Basic Education, 2011b), nearly 80% of schools are without library or computer facilities and nearly 15% do not have access to electricity.

Violence is a widespread phenomenon across South Africa and can pose a major challenge to the physical and emotional development of children (Barbarin and Richter, 2001). Exposure to violence is commonplace for a large number of South African schools, ans school safety, particularly for girl learners is receiving much attention.

Teachers

Teacher and learner attendance have been identified as important factors for academic success (Gottfried, 2009; Miller, *et al*., 2014). Learners with good attendance records achieve better results and learner attendance has even been used to represent the quality of the school (Coutts, 1998). While emphasis on teacher content knowledge is often a key component in international education studies, less attention is given to the way teachers view their profession and how they perceive their competence. And yet increased commitment levels among teachers are strongly linked to low teacher turnover and positive attitudes among learners (Day, *et al*., 2005). Such factors are also

directly related to how committed teachers are to remaining in a profession that is already experiencing critical shortages (Arends and Phurutse, 2009).

Sayed (2015) notes that the most single important instrument or tool or resource any country has to effect equity is teachers and yet it can be an important neglected aspect of policy. The international experience is relevant here, suggesting that in the classrooms of the most effective teachers, students from disadvantaged backgrounds learn at the same rate as those from advantaged backgrounds (Hamre and Pianta, 2005). Nye, Konstantopoulos and Hedges (2004) also show that teacher effects are higher in low socio-economic status (SES) schools than in high SES schools and that in low SES schools it matters more that teachers are effective than in high SES schools. A meta-analysis of research conducted from 1990 to 2010 on the school-level factors influencing student outcomes in developing countries concluded that more knowledgeable teachers, teachers who are less likely to be absent, and teachers who assign homework, are among some of the few school variables with a consistently positive relationship to student outcomes (Glewwe, *et al*. 2011).

Concluding comments

This address shows that a number of strategies have been put in place to address the many intractable problems in education reform and the delivery of quality education. As always, policy is one thing: implementation another, and it is apparent that necessary conditions of the delivery of quality education are adequate finance and human resources, involvement and a sense of ownership by role-players, regular monitoring and evaluation and sustained effort. At school level, institutional functionality, a focus on instructional leadership, a clear-sighted emphasis on reading, writing and professional development and professionalising the divisions of the civil service dealing with education are critical to success. Above all, it is essential to embed the notion of education as a public good, and foreground the view that equality and social justice must drive educational reform. Widespread community mobilisation is required to ensure that the undoubted gains in terms of education access and participation in schooling become the foundation for meaningful learning which offer real life chances for our young people in further and higher education and in the labour market.

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