

South African National Report
on the
Development and State of the Art
of
Adult Learning and Education
June 2008

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Preamble: Adult Learning in South Africa in the last 12 years

Depending on the lens that is used to explore achievements over the last 12 years, so the outcomes vary. To do this, we are deliberately using the language and lens of adult learning rather than adult education. (Walters 2006) We do this because, firstly, adult education is still commonly equated with either personal development for the middle classes or literacy and basic education for the poor.

Secondly, adult learning is embedded in the political, social, cultural and economic processes of society. Its primary social purposes within a context like South Africa are: to enhance possibilities for women and men to **survive** the harsh conditions in which they live; to develop skills for people in the formal and informal sectors for **economic** purposes; and to provide **cultural and political** education which encourages women and men to participate actively in society through cultural organisations, social movements, political parties and trade unions. Improving the lives of the majority, who are poor, demands a holistic approach that enables inter-sectoral strategies across national and local government departments, civil society organisations and those in the economy. Increasingly, the notion of **learning for sustainable livelihoods** is being identified as a helpful, more inclusive conceptual framework. (Von Kotze 2007) The language of `learning` or `capacity building` resonates more easily with, for example, the health, environmental, welfare, or business sectors. They more readily recognise their involvement in `learning`, rather than `education`, as they go about their daily business.

Thirdly, as Torres (2003: 23) argues, adult education in the South “has always been trapped between meagre attention and resources and overly ambitious expectations”. Unlike many countries in the North, the South does not have compact networks of public or private education and training organisations that are overwhelming citizens with learning opportunities. Adult education facilities are limited. The majority of adults do not have the expectation of `education`; this is for their children. Therefore she argues (p.24) that “expanding the perceived learning needs and enhancing the capability to demand them is particularly important for learners in the most disadvantaged situations”. Learning, she argues, does not imply an individualised approach. The building of learning communities to help address the daily struggles within a comprehensive and integrated development strategy is essential.

Trying to assess comprehensively what adult learning has taken place in the last 12 years is virtually impossible as the programmes and activities are hard to find. They may be located under `capacity building` or `staff development` or `community development` in organisations or government departments. What we are able to do here is suggest a range of activities and programmes that were found through searching web sites, annual reports and other documents, including a draft report on Lifelong Learning in South Africa, commissioned by the NIACE. (Walters 2008) In addition, we draw inferences from socio-economic statistical data. What is obvious is that there is a need for substantial research to give a more comprehensive and accurate picture. We also are informed by discussions taking place in the Ministerial Task Team which is developing a Green Paper on `revamping the adult education and training system`.¹

1. Introductory Note on Statistics

Of necessity, a significant proportion of this report's content focuses on quantitative measures, derived from statistics. This is data we use to measure our progress over time and also our performance in relation to others. Whilst the use of these statistics is necessary it is also problematic because of questions about their reliability:

“Estimating and projecting the South African population has never been an easy task because of the paucity of data and the heterogeneous nature of the population.... the known undercount [in the census] (for which the actual count needed to be adjusted) was larger in 2001 than in 1996 and is of such a magnitude that one cannot place any reliance on the small area estimates arising out of either census¹.”

Whilst this is a comment on difficulties with “small area estimates”, we have also encountered problems over macro statistics. For instance, the National Skills Development Strategy Implementation Report 2004 to 2005, which summarises the first 4 years of the strategy, contains a figure for the number of white women participating in structured learning programmes in the 2003/4 year that is six times greater than the preceding year, nearly four times greater than the succeeding year and nearly as great as the figure for black men². Given the demographics of South Africa, the figure is not credible. However, there is a tendency amongst some researchers to place reliance on such data. So, for example, the Human Science Research Council's 2008 Human Resource Development Review cites with authority the percentages derived from these clearly mistaken figures³. And so they pass into the national discourse and become ‘truth’.

We have attempted to trace the data we cite back to its source, often in publications of Stats SA. We use them to indicate impressions and trends rather than to claim definitive ‘truths’.

2. General Overview

In this section we provide a largely statistical overview of South Africa and its 9 provinces, focusing on areas that throw light on the contexts for adult learning. We are keen to ensure that a key message coming through the report is that **‘one size does NOT fit all’**. So we give provincial and national data where available and appropriate, also data that shows racial, gender, age and class differentials. We:

- Identify the size and gender of the population and indicate growth trends
- Examine the age profile of the South African population and compare it with other developing and developed societies
- Describe the employment and unemployment environment and trends
- Look at some key indicators of poverty and vulnerability
- Question the identity and character of the South African ‘adult’

¹ Projection Of The Population Of The City Of Cape Town 2001-2021, Professor R E Dorrington, Centre of Actuarial Research, University of Cape Town, 2005

² National Skills Development Strategy Implementation Report 1 April 2004 – 31 March 2005, Section 8.2.2, Page 58

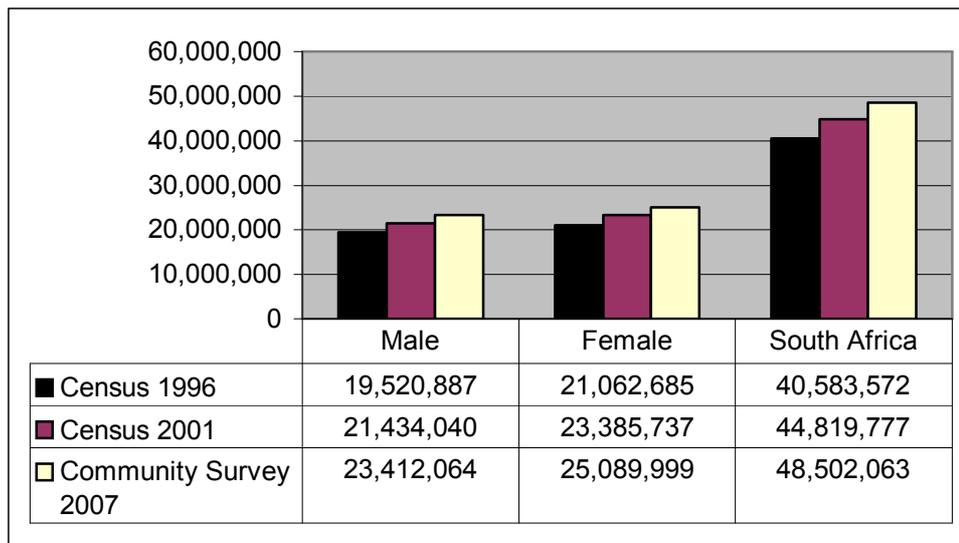
³ Kraak et al HSRC Review 2008 Table 14.2, Page 302

- Examine urbanisation trends
- Identify languages spoken and used

2.1 Population size and gender

South Africa, with a population of approximately 48 million, grew by approximately 8% between 2001 and 2007.

Figure 1: Population of South Africa by Gender



National statistics for South Africa should be treated with some care – it is a country which displays significant provincial differences which will be noted throughout this report. Here we have noted the difference in size of the provincial populations.

Figure 2: Map of South Africa and its Provinces

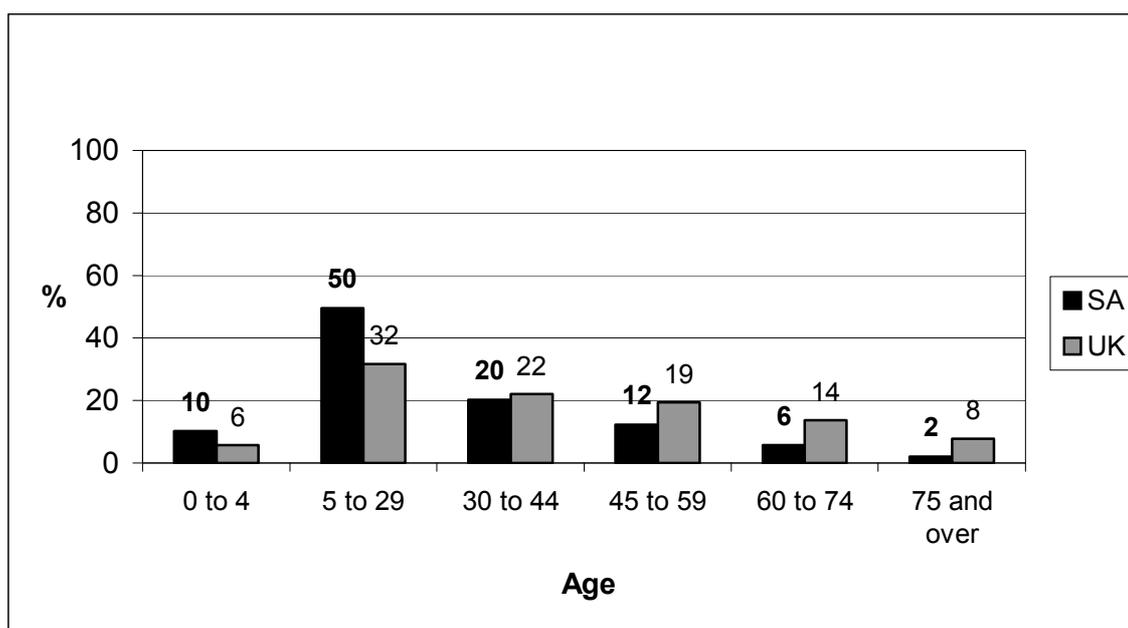


The most populous province, Gauteng has a surface area of only 16,548 km², while the Northern Cape, with a population one-tenth the size, has a surface area more than 20 times bigger, at 372,889 km²⁴.

2.2 South African Population: Age Profile

51% of the South African population is below the age of 25. In comparison with a country such as UK, the young population is much higher and the old population much lower:

Figure 3: Comparative Population Age South Africa and UK



As the commentary from the UK National Statistics website indicates:

“The UK has an ageing population. This is the result of declines in the mortality rate and in past fertility rates. This has led to a declining proportion of the population aged under 16 and an increasing proportion aged 65 and over.”⁵

This age feature of countries of the south is well illustrated by a comparison of the ages of a basket of more and less developed countries⁶:

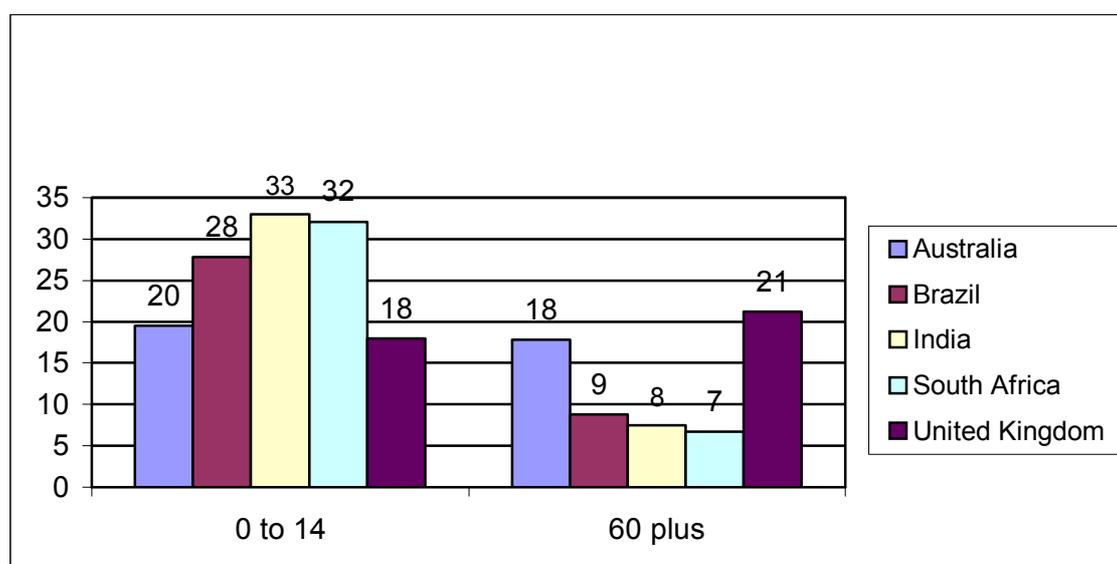
⁴ <http://www.southafrica.info/about/geography/provinces.htm>

⁵ http://www.statistics.gov.uk/cci/nugget_print.asp?ID=6

⁶

http://unstats.un.org/unsd/cdb/cdb_advanced_data_extract_fm.asp?HYrID=2005&HSrID=13680&HCrID=36%2C76%2C356%2C710%2C826&yrID=2005&continue=Continue+%3E%3E

Figure 4: Age Groups 0 to 14 and 60 plus as % of total population in 2005



In addition, life expectancy at birth in South Africa in 2007 was 50⁷. This compares with UK figures for 2004-2006 of 77 for men and 81 for women⁸.

These figures indicate the very different constituencies for school education and adult education in the different countries. For example, the Discussion paper ‘Demography and Adult Learning’ asserts that in the UK:

“It is virtually certain that we will see:

- **growing numbers of “young old” people**, mainly aged 50-75, most of whom will be in good health and many of them still economically active;
- **growing numbers of “old old” people**, mainly aged 75 -100+, many potentially active, but dependent on others for some aspects of daily life;
- **shrinking numbers of young people** entering the labour market;⁹”

and that as a result 2 of the 7 key learning priorities will be:

- “• maintaining the employability of older people
- developing qualifications systems which enable older people, and people with qualifications and experience from other countries, to have their real skills and qualifications recognised and used to access appropriate work;”

This would hardly be the case in South Africa where, as we shall see below in the section on the ‘National Skills Development Strategy’ the most important priority is seen to be the supply of ‘scarce and critical skills’ to the economy.

The fundamental demographic differences between countries of the ‘south’ and of

⁷ <http://www.hst.org.za/healthstats/82/data>. Figures for 2004, disaggregated by population group, are: African 49, Coloured 56, Indian and White 63.

⁸ <http://www.statistics.gov.uk/cci/nugget.asp?id=168>

⁹ McNair, S (2007) Demography and Adult Learning, A Discussion paper for the NIACE Commission of Inquiry

the 'north' is very significant because of the colonial histories and the common practices of people deferring to those in 'the north' from where the majority of literature in the field is generated and sourced. (Walters 2008)

Given South Africa's history, racial differences are key in analysis of its statistics. The term 'population group' is used to denote the 4 racial subgroups of the population, which are Black African, Coloured, Asian and White. We follow this convention, and an age analysis by population group is revealing:

Figure 5: Age by Population Group

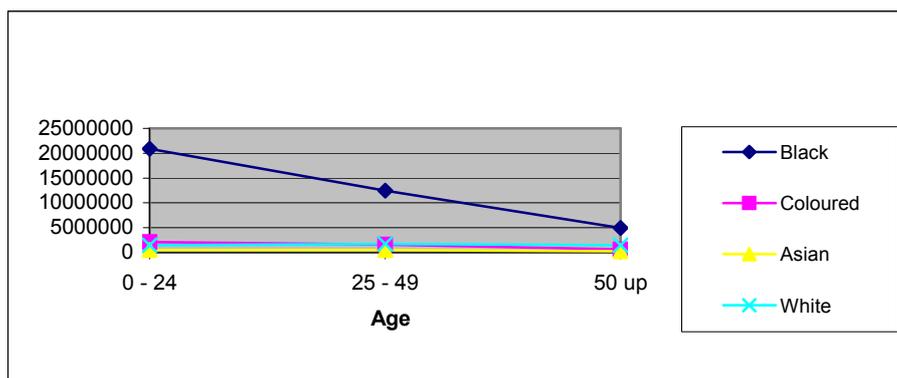


Figure 5 above demonstrates that the youth of the population is as a result of the youth of the Black African population. The age distribution of the other population groups is relatively even.

2.3 Employment and Unemployment

South Africa is regarded as a middle income country with a per capita income around US \$ 3600, in the same category as Argentina, Brazil, Russia, Turkey and Venezuela. The South African economy displays elements of both development and underdevelopment, sometimes characterized respectively as the 'first' and 'second' economies. In the former, a small but growing proportion of the population enjoys a standard of living comparable with that in the industrialized world while in the latter there are significantly high levels of poverty.

With regard to poverty, recent estimates indicate that more than 45 percent of the population is living below a conservatively-estimated national poverty line (R354 per month). Poverty is also distributed unevenly by race, gender and region. For example, the proportion of black South Africans living on less than US \$1 per day was estimated recently at just under 13%; the corresponding figures for coloured, Indian and white South Africans were respectively 3.6%, 3.1%, and 0.4% respectively. Regionally, using the same measure of poverty, the incidence of poverty varies from 2.7% in the Western Cape to 15% in the Eastern Cape and 18% in Limpopo.

Vast inequalities in the distribution of income and wealth represent a formidable challenge and remain an important constraint to growth and an important factor in addressing problems of social cohesion. With a Gini coefficient of around 0.6, South Africa is one of the most unequal countries – as with poverty, the pattern of inequality manifests itself in its racial, gender and regional dimensions. In addition, a new trend of intra-black inequality is manifesting itself in the post-apartheid era.

Underlying the poverty and inequality challenges is a high level of unemployment. The unemployment rate varies between 25 and 40% depending on the measure used. Unemployment is highest amongst black Africans (32%), and women (31%), and in rural areas.

The table below shows a rising trend in total unemployment between 2001 and 2003, followed by a consistent but slow decline to 2007. Unemployment among women is consistently higher than for men for the period.

Table 1: Unemployment rate (narrow definition), 2001-2007 (%)

	2001	2002	2003	2004	2005	2006	2007
Female unemployment	28,6	33,9	35,9	32,9	31,4	30,3	30,8
Male unemployed	24,6	26,1	27,2	23,9	22,4	21,6	21,1
Total unemployed	26,4	29,7	31,2	27,9	26,5	25,6	25,5

Source: Stats SA, 2007

Race and gender are key determinants of unemployment. For the period shown in the above table, the most disadvantaged groups in descending order are: black females; black males; coloured females; Indian females; coloured males; Indian males; white females; and white males.

The table above uses the official or strict definition of unemployment. This definition has shortcomings because its last criterion of “actively taken steps to look for work” is not always a realistic option in developing countries where many people are unemployed for more than a year. When the number of ‘discouraged workers’ is added to the number unemployed, one gets the so-called ‘broad’ definition of unemployment. In South Africa, this figure has long hovered around 40%.

Unemployment is rising: the number of employed people has risen, in the six years covered by the data, by 373,000, or 3%, during a period in which, as we noted above, the population increased by about 8%. As a result, although the official unemployment rate has declined, labour absorption¹⁰ and participation¹¹ rates have also declined and the number of discouraged work-seekers has increased by 30%.

- Unemployment is disproportionately black: 88% of the number officially designated as unemployed are Black Africans¹²; this compares with 78% of the overall population of South Africa¹³,
- Black unemployment is overwhelmingly young: 75% of the Black African unemployed are below the age of 35; this compares with an overall demographic of 38% for the Black African population aged 15 to 34 years.
- The number of discouraged workseekers rose by 30% between 2001 and 2007¹⁴
- Discouraged work-seekers are disproportionately female: 13.8% of women of working age are classified as discouraged work-seekers, compared to 9.2% of men¹⁵.

¹⁰ Labour absorption is the number of employed as a percentage of the population of working age

¹¹ Labour participation is the number of employed plus the number of unemployed as a percentage of the population of working age

¹² Labour Force Survey 2007

¹³ Community Survey 2007

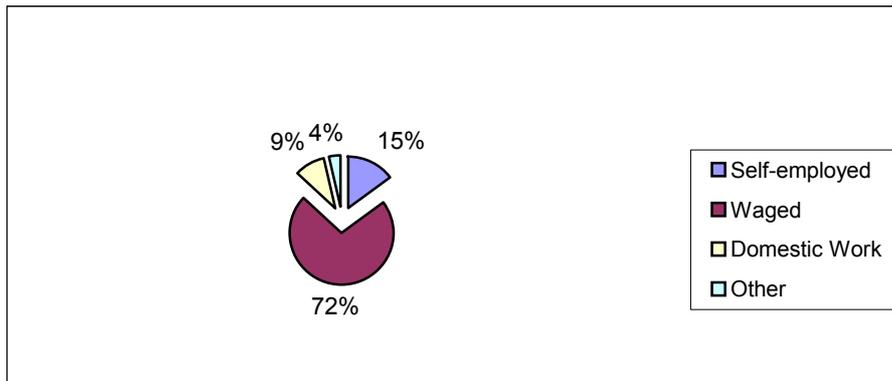
¹⁴ Labour Force Survey

¹⁵ Labour Force Survey 2007

Again, the picture of unemployment is not a homogenous one. We can get a picture of concentrated areas of unemployment through a Department of Social Development study of the 21 nodes that make up the Integrated Sustainable Rural Development Programme (ISRDP) and Urban Renewal Programme (URP). These nodes – 13 of which fall under the ISRDP and 8 of which fall under the URP – were selected because of the deep poverty in which many of their citizens live. This study reported average unemployment levels of 79.1% in the ISRDP areas and 62.6% in the URP areas. Further, 75% of the ISRDP unemployed and 61% of the URP unemployed reported being unemployed for 4 years or more.¹⁶

Figure 6 below¹⁷ indicates the proportion of self-employed people:

Figure 6: Employed and Self-employed



This category, 'self-employed', is itself heterogeneous in a country like South Africa. A person in the category "works for him-/herself without employing anyone else"¹⁸, thereby including everything from relatively highly paid consultants to hawkers. No disaggregation of the category was available.

Figure 7 below shows the percentage of employees who have reached key education milestones¹⁹.

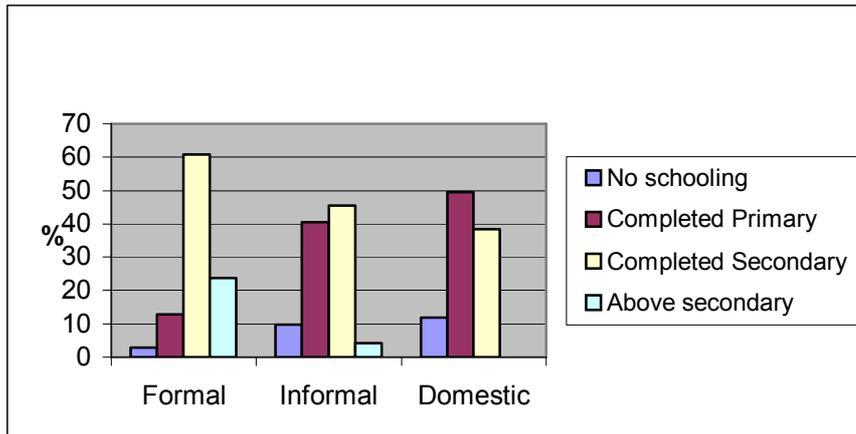
Figure 7: Employed: Highest Level of Education

¹⁶ Baseline Survey of the 21 ISRDP and URP Nodes, Everatt, Smith and Solanki for the Department of Social Development, 2006

¹⁷ Labour Force Survey September 2007

¹⁸ <http://www.statssa.gov.za/census01/Census96/HTML/Metadata/Metadta/summarz3.html>

¹⁹ Data from Labour Force Survey 2007



It is significant for any skills development strategy (see the National Skills Development Strategy below) that 60% of formal sector employees have completed secondary education. It is perhaps predictable that the proportion drops significantly in the informal and domestic sectors.

2.4 Key Indicators of Poverty and Vulnerability

Here we present some data on poverty and health. We do so from the understanding that these factors impact significantly both on the capacity of the individual to engage successfully in learning (environmental factors such as electrical power, sanitation etc) and also on the capacity of society to retain the education and skills that have been attained (disease factors such as HIV and TB).

Table 2 below presents data on a variety of environmental poverty indicators, disaggregated by Province

Table 2: Environmental poverty indicators, disaggregated by Province

	WC	EC	NC	FS	KZ	NW	GA	MP	LP	Total
Households lacking access to piped water	0.9	40.1	3.4	3.2	23	9.1	0.9	9.4	22.2	13.9
Households lacking access to electricity	6	42.8	17.6	15.3	30.7	15	11.2	18.9	25.7	21.3
Households lacking access to sanitation	8.5	69.3	27.3	40.8	53.8	56.5	13.1	54.7	83.2	43.3
Share of population in poorest 40% nationally	16.9	54.9	38.6	35.4	45.3	45.8	24.9	41.5	55.4	40
Rate of access to social grants	24.7	46.1	37.9	32.7	33.7	34.9	20.2	36.1	47.6	32.8
Disability Rate	3.5	2.5	4.1	2.9	1.9	2.9	2.1	2.7	2.7	2.5
Share of households with child hunger	4.9	8.8	6.8	7.4	7.6	10.9	5.4	8.8	4.8	7

Table 3: Legend of Provincial Abbreviations

WC	Western Cape	NW	North West
EC	Eastern Cape	GA	Gauteng
NC	Northern Cape	MP	Mpumalanga
FS	Free State	LP	Limpopo
KZ	Kwazulu Natal		

These data strongly support the picture of a country in which provincial differentiation plays a significant role. The very high figures for the Eastern Cape (EC) and Limpopo (LP), for example, contrast strongly with the relatively low figures for Gauteng (GA) and the Western Cape (WC)

2.5 HIV / Aids Statistics

Table 4: HIV / AIDS Statistics

People with HIV	5.6 million
Females over the age of two with HIV ²⁰	13.3%
Males over the age of two with HIV ²¹	8.2%
Pregnant women with HIV	29.1%
Rate of new infections for people over the age of two (incidence)	2.7%
AIDS deaths in year	370,000
Cumulative AIDS deaths	2.5 million
People enrolled in the public sector antiretroviral programme	488,739
People on treatment in the private health system	100,000
People requiring treatment but not receiving it	524,000

A 2005 study of teachers revealed that 21% of 25- to 34-year-olds and 13% of 35- to 44-year-olds tested HIV positive²².

Some commentary, from the Treatment Action Campaign, one of the most active NGOs on HIV / Aids, gives some additional interpretation:

“We know with some confidence that most people who are infected live in informal settlements. This suggests that housing and related living conditions are a big factor in HIV transmission. We also know with confidence that significantly more women are infected than men. This can probably be explained by both biology and social conditions. We are virtually certain that black Africans are disproportionately infected, although the epidemic has reached epidemic proportions among other population groups too. This too is very likely due to social conditions.”²³

The impact on life of HIV/Aids in a rural part of the Eastern Cape is graphically described in the study by Steinberg (2008). He shows how caring for the sick, dealing with the loss of economically active members of the family, mobilising to advocate and educate people around the epidemic, are all absorbing for many women, men and children in communities.

The rise in the incidence of TB is dramatic.

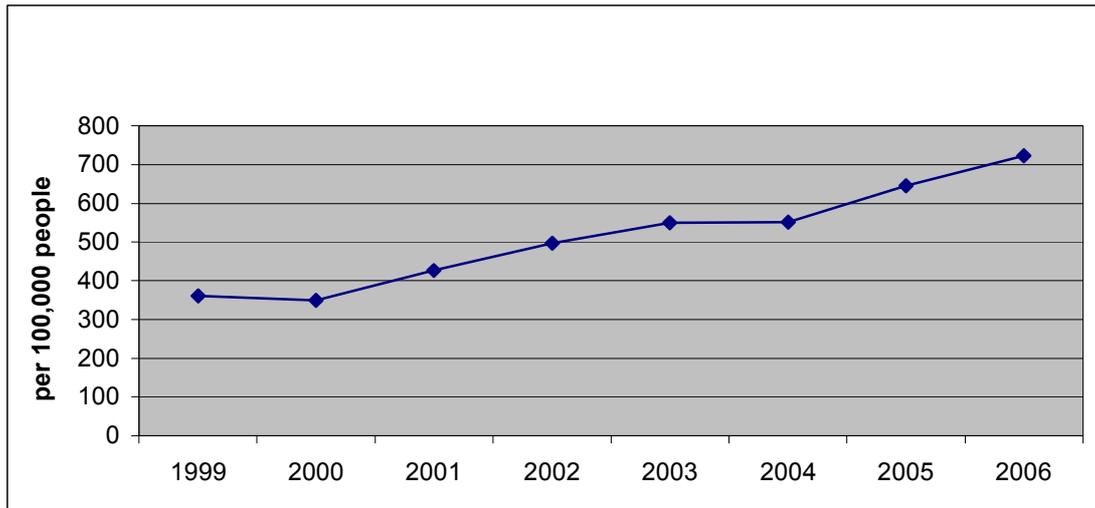
Figure 8: Incidence of TB in South Africa

²⁰ Household Survey, HSRC 2005

²¹ Household Survey, HSRC 2005

²² <http://www.csa.za.org/article/articleview/346/1/1/>

²³ What do South Africa's AIDS statistics mean? A TAC briefing paper, Nathan Geffen 2006, accessed at <http://www.tac.org.za/community/aidsstats>



Source: Health Systems Trust <http://www.hst.org.za/healthstats/16/data>

As Archbishop Emeritus Desmond Tutu is quoted as saying: "TB is the child of poverty - and also its parent and provider". This is the case because:

- "people are likely to live in dark, unventilated rooms, and thus more likely to be infected by TB and to receive large doses of the bacilli.
- Patients' resistance to the disease is reduced, particularly by malnutrition and other diseases such as HIV"²⁴.

Because of illness or death of adults, children are sometimes left to fulfil adult roles and responsibilities. This then leads to a questioning of what it means to be `adult`.

2.6 Questioning Adult Identity: Who is an adult learner?

There is a great deal of debate in the literature on what it means to be an `adult learner` aside from the notion of chronological age. The most significant dimensions appear to be that adult learners carry `adult responsibilities` through their economic, family or community commitments. They bring complex life experiences to the learning environments and their time is often very constrained precisely because of their multiple roles and responsibilities. The growing numbers of child-headed households, through loss of parents to AIDS or other illnesses, raise key questions as to who are `adult`, given that the children will be carrying out `adult responsibilities`. This then poses challenges for provision of learning opportunities for both children and adults.

²⁴ TB Alert website <http://www.tbalert.org/worldwide/TBAndpoverty.php>

Table 5: The number and proportion of children living in child-headed households in South Africa by province²⁵

Province	2004	2005
	Number	Number
Eastern Cape	28 718	27 280
Free State	3 773	7 877
Gauteng	1 850	5 306
Kwazulu-Natal	11 044	15 152
Limpopo	36 438	45 795
Mpumalanga	7 197	5 945
North West	14 680	9 156
Northern Cape	N/A	474
Western Cape	N/A	1 580
South Africa	104 423	118 564

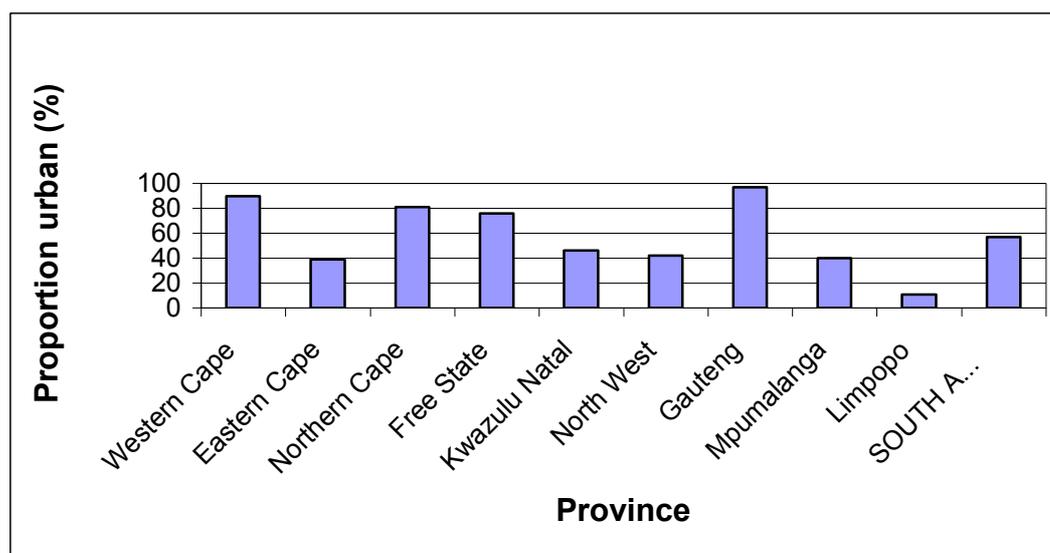
Again, provincial differences are notable, as well as a general upward trend: the figures indicate a rise of 13%, although with such relatively small numbers, care should be taken in placing too much reliance on their accuracy.

2.7 Urbanisation

It is not possible accurately to identify urbanisation trends since the 1996 census. The criteria for defining the categories 'urban' and 'rural' changed with local government changes in 2000. However, we assume that South Africa is part of global trends towards increased urbanisation. Certainly there is a tradition of migration from the poorer areas to the urban centres, for example from the Eastern Cape to Cape Town in the Western Cape. Figure 9 below gives a snapshot of the picture at the 2001 census, showing once again substantial provincial differences.

²⁵ Children's Institute, University of Cape Town 2006, sources from Stats SA (2005; 2006) General Household Survey 2004 and 2005. Analysis by Debbie Budlender, Centre for Actuarial Research, UCT

Figure 9: Urbanisation levels per province and for South Africa (2001)



Immigration to South Africa from outside its borders is also impossible to measure accurately. Official immigration figures are very small. For example, there were 5,650 immigrants into the country in 2005²⁶. This number is exceeded by the number of emigrants: in 2003, 16,165 people emigrated from South Africa. However, the situation with 'illegal immigration' is, by its nature, obscure. There has been substantial recent immigration from Zimbabwe, accompanied by widespread rumours about numbers. One commentary notes that: "Most of the commonly quoted statistics, which range from one to three million Zimbabweans, are extrapolated from ungeneralisable data (including deportation numbers, border crossing statistics or asylum statistics) or are based on conjecture. A likely estimate, based on a range of data sources, is around one million Zimbabweans in South Africa".²⁷ It is clear from recent events of 'xenophobic attacks' that this large-scale immigration has put pressure on impoverished areas.

Migration, whether in-country or from out-of-country is a major issue for most countries around the world and poses immediate and long term challenges for provision of lifelong learning opportunities which often have to do with language and literacy competencies in various languages, creating sustainable livelihoods, or obtaining recognition and credit for education and training acquired from another country. (For example, the South African Qualifications Authority (SAQA) processes hundreds of applications per month of foreign qualifications.)

2.8 Languages

South Africa has 11 official languages. Figure 10 below²⁸, taken from the 2001 census, indicates the percentage of the population which uses each language most often at home:

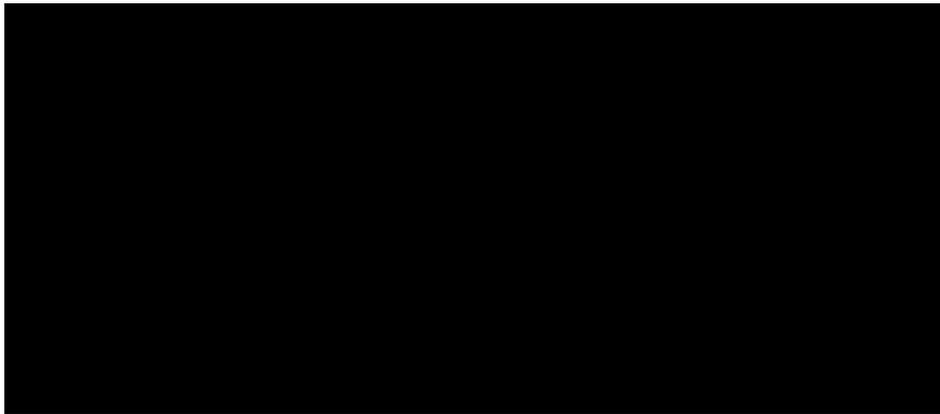
²⁶ South African Migration Project

http://www.queensu.ca/samp/migrationnews/article.php?Mig_News_ID=4125&Mig_News_Issue=23&Mig_News_Cat=8

²⁷ Responding to Zimbabwean Migration in South Africa – Evaluating Options, Wits Forced Migration Studies Programme, 2007; accessed at <http://migration.org.za/wp-content/uploads/2008/03/zimresponses07-11-27.pdf>

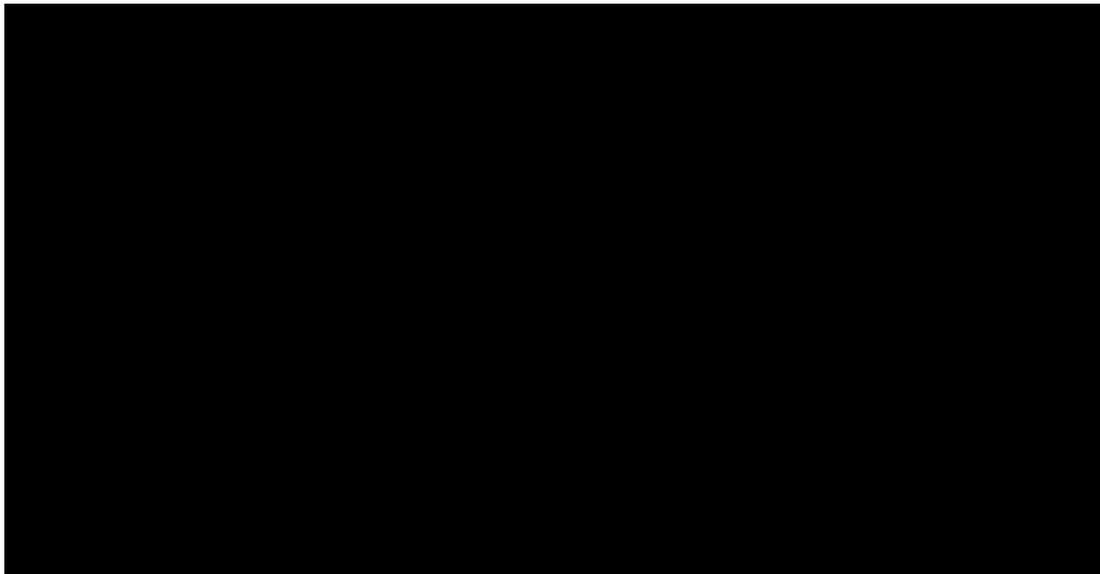
²⁸ Data from 2001 census, Stats SA

Figure 10: Languages spoken most often at home



However, again there are interesting provincial differences. 9 out of the 11 provinces have a majority language.

Figure 11: Language most often spoken at home by province



In the cases of the Eastern Cape and Kwazulu-Natal it is a language spoken by over 80% of the population. However, in Gauteng, the most densely populated and urbanised province which attracts its population from the entire country, a flourishing of many languages means that isiZulu, the language spoken by the most people, only covers just over 20% of the population.

The language of business and the economy is mainly English and, in some areas, Afrikaans. The language profile reflects a complex set of language and literacy needs for adult learners throughout the country.

2.9 Internet Usage

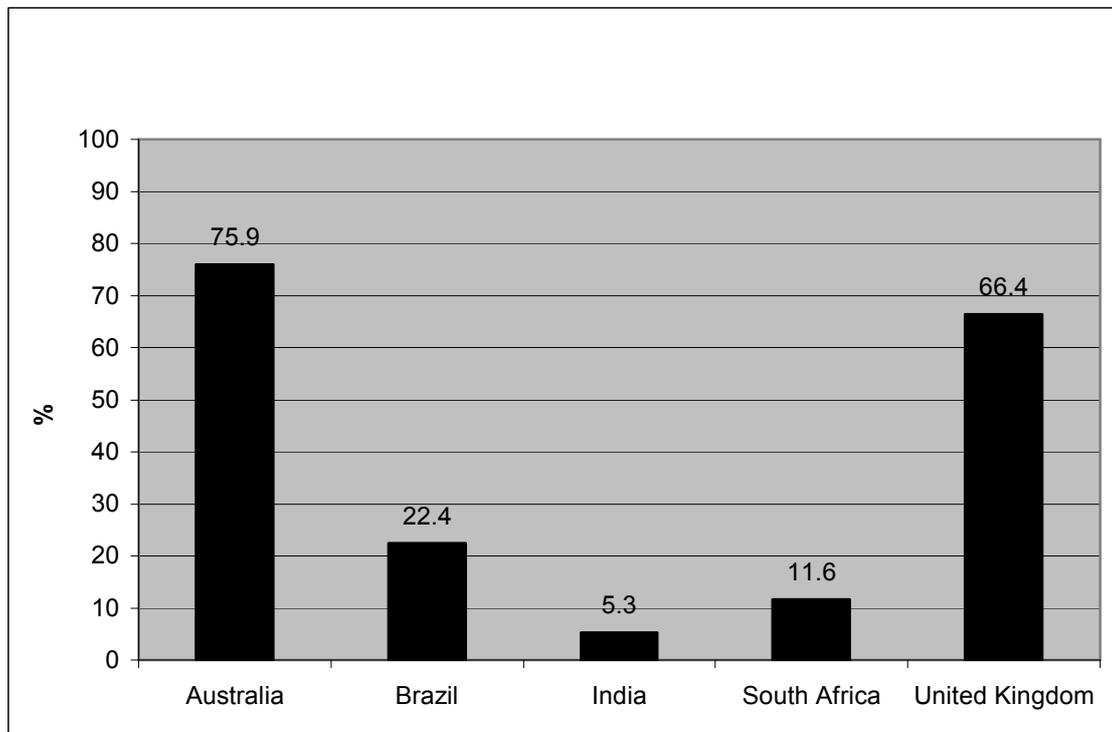
Table 6 below identifies the number of internet users in South Africa. The compiler of the statistics²⁹ defines an internet user as a South African “individual with access to the Internet. It balances out multiple use of home accounts with multiple points of contact (i.e. home and work usage is balanced by the fact that many households have more than one user). Cellphone access (on the device) is not yet counted, but we may introduce it this year.”

Table 6: Internet Usage

Year	Number of Users
2001	2.89 million
2002	3.1 million
2003	3.28 million
2004	N/A
2005	3.6 million
2006	N/A
2007	3.95 million

The ‘Internet World Stats’ website has a significantly higher estimate, putting South African internet users at 5.1 million in September 2006, compared with 2.4 million in December 2000. We quote these figures in order to be able to take advantage of the comparative data available. Figure 12 below compares the percentage of the on-line South Africa population with that of the basket of countries we looked at earlier for age statistics.

Figure 12: Comparative Internet Usage 2007



²⁹ “The Goldstuck Report: Internet Access in South Africa”, published by World Wide Worx, <http://www.theworx.biz/>

It is interesting that Brazil's percentage is nearly double that of South Africa and India's less than half. Looking at simple numbers, rather than percentages, disadvantages South Africa even more, with Brazil's online population estimated at 42.6 million and India's at 60 million. Finally, it may be worth casting a glance at China, with an internet penetration estimated at 15.9% of the population, 210 million people.

The implications of these figures for South Africa are mainly that, with the exception of targeted groups of known internet users, **the internet is not generally a viable medium either for the exclusive delivery of learning programmes or to support them. This is a significant limitation.**

3. Education

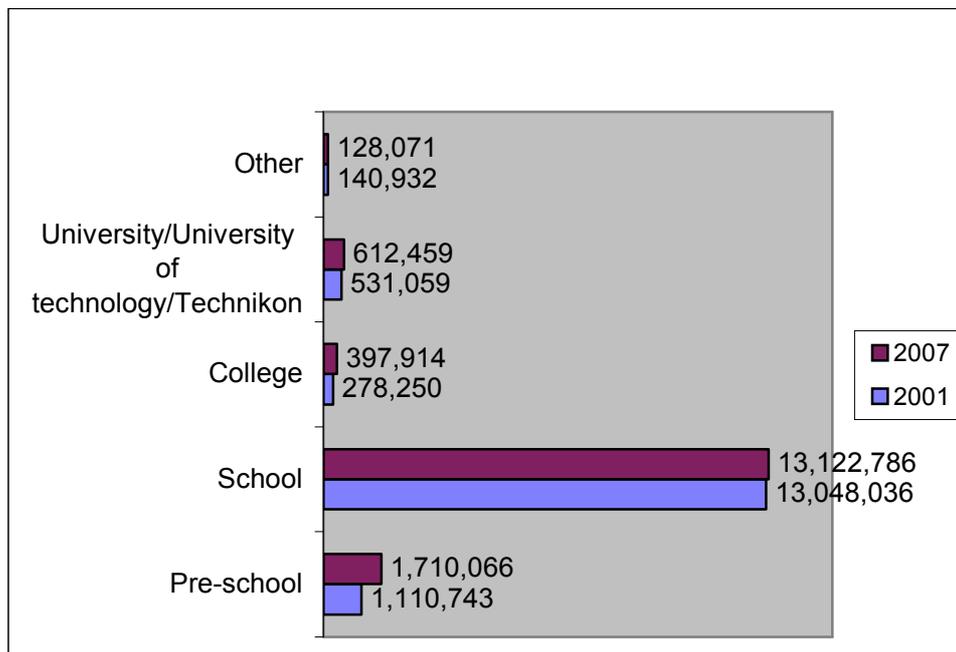
This section looks more specifically at data on education, focusing on:

- Attendance at institutions of learning
- Levels of education achieved
- The conditions under which learning takes place

3.1 Attendance at institutions of learning

Figure 13 below indicates the numbers enrolled in education institutions at the time of the last Census in 2001 and the Community Survey in 2007.

Figure 13: Education enrolment 2001 and 2007



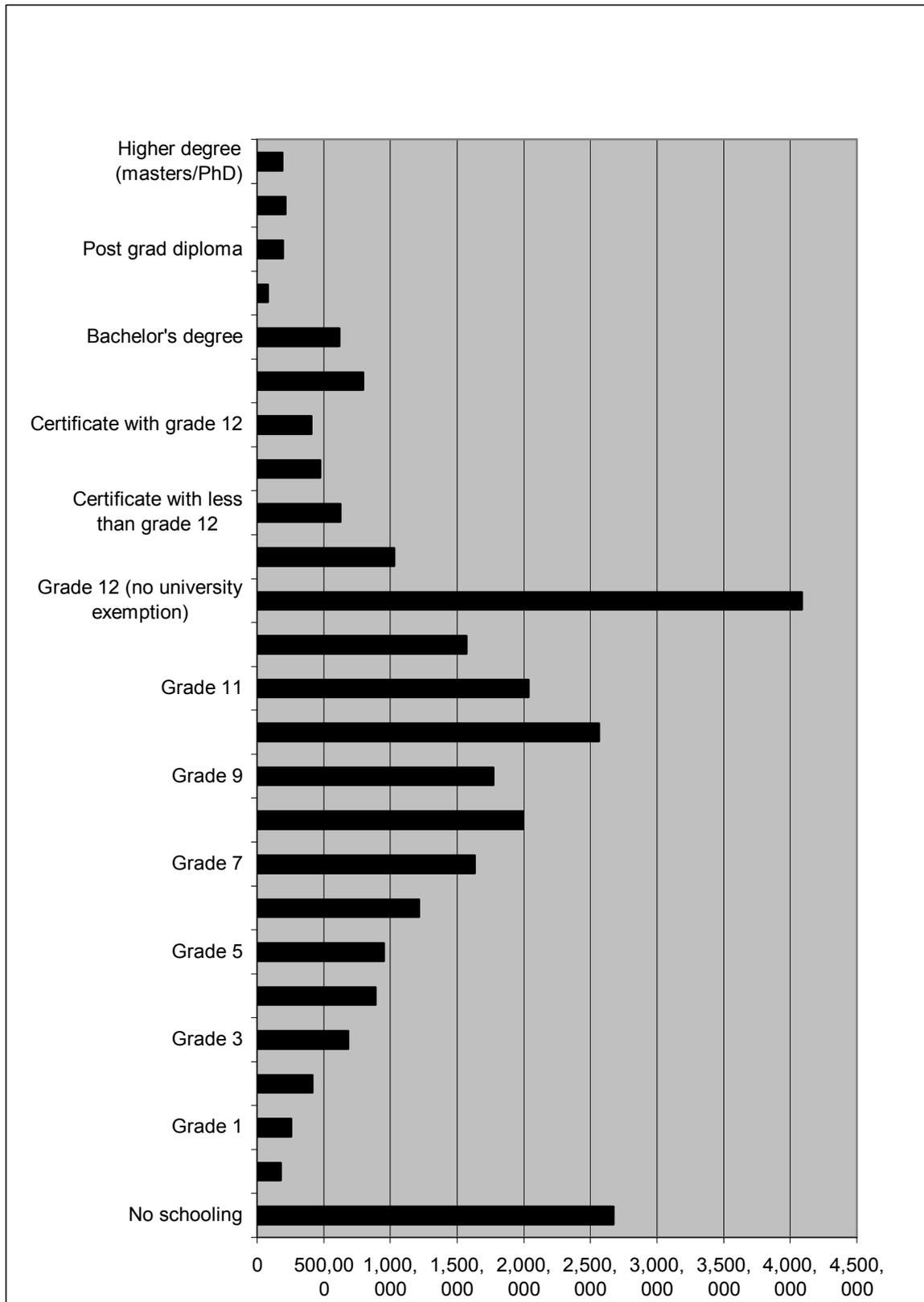
These figures indicate a 54% increase in the numbers attending pre-school, a 43% increase in those attending college and a 15% increase in those attending tertiary institutions. The numbers attending college comprise both adult and young learners; Further Education and Training (FET) Colleges cater for Grades 10, 11 and 12 equivalent learners who move to FET College immediately after Grade 9. However, they also are supposed to cater for adult learners, mainly on a part-time basis, who attend while working or unemployed. One of the reasons for the dramatic increase in pre-school enrolments is the introduction of a reception year at school for 5 year olds.

As pre-school is one of the foundations for lifelong learning, this is a significant development. Bursaries have been increased for further and higher education which would help explain the increases in numbers.

3.2 Levels of education achieved

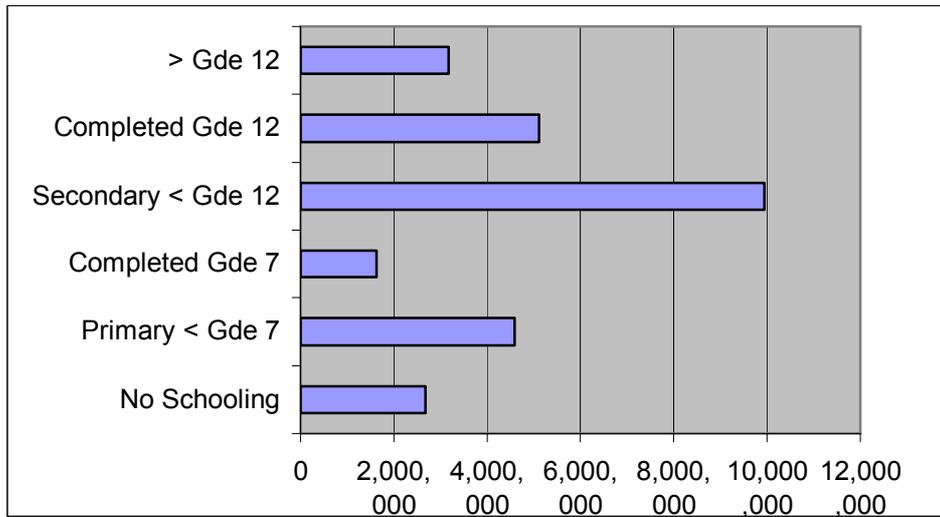
Figure 14 below gives the detailed picture of the highest level of education achieved by people 20 years or older. This in effect describes the educational level of the adults who are the target market for adult education and training.

Figure 14: Education Level 20 Years and Older



The above chart can be summarised as follows:

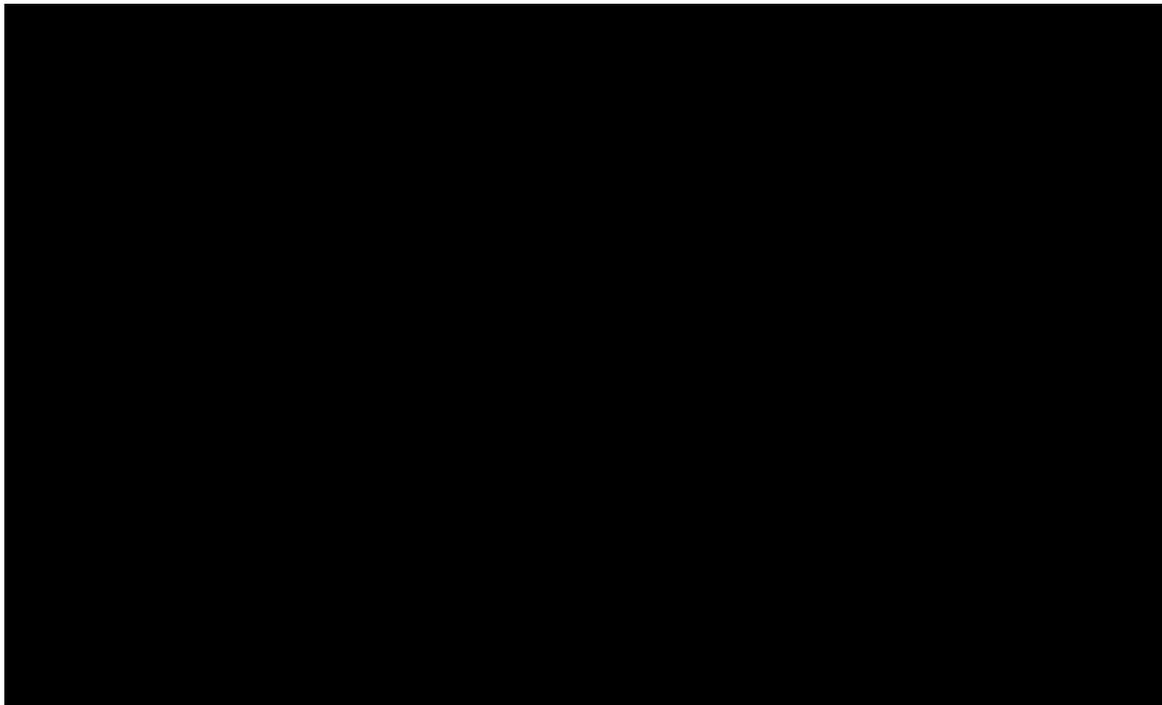
Figure 15: Education levels 20 years and older, Summary



Probably the most striking feature of these figures is the very large number of people, over 2.5 million, who have no schooling at all. Also significant, as a description of the adult learning environment, is that over 70% have not completed secondary education.

We then looked at education levels over time:

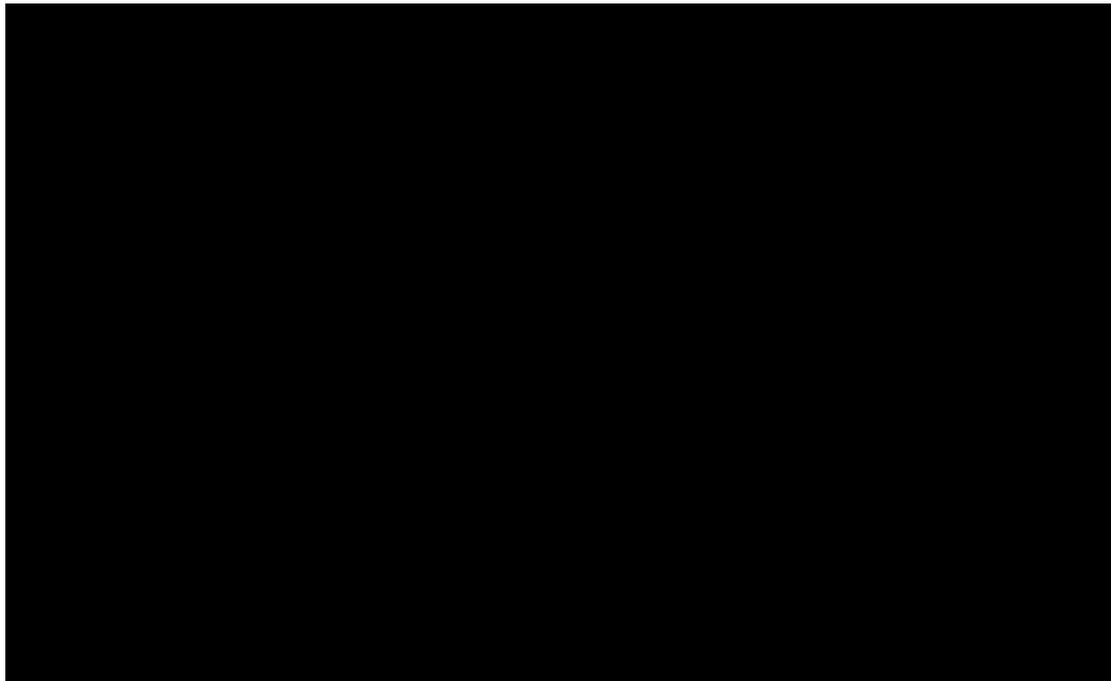
Figure 16: Highest level of education 20 years and older 1996 to 2007



The percentage with no schooling has dropped very substantially, and the percentages completing some secondary education and completing higher education have both grown, the former very substantially, especially taking into account a drop between 1996 and 2001. **This table shows the marked improvement in educational levels of South Africans in the last 12 years.**

The figures for 2007 were then disaggregated by population group.

Figure 17: Education level by population group over age 20



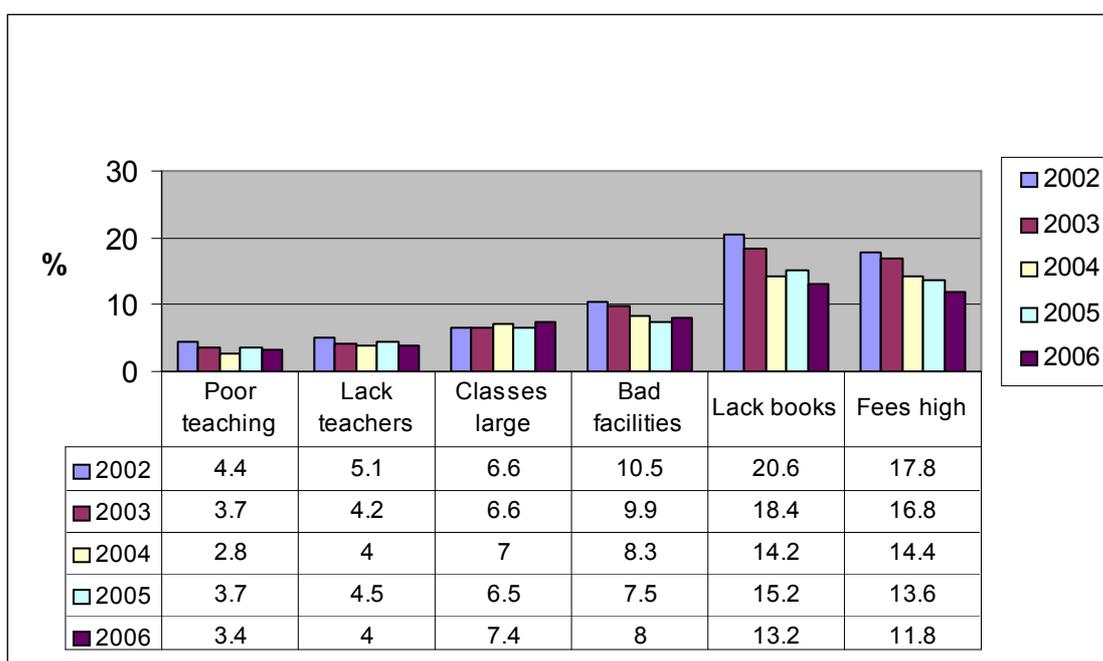
The data here confirms expected results: the distribution of education levels is least favourable to Black Africans and most favourable to Whites. In particular it is significant that they show that very high proportions of Black and Coloured learners start secondary education but do not complete it, whereas Indian and White learners are significantly more likely to complete their secondary education. Finally, if we look at those with less than grade 7 by age, **we see that the level of education amongst adults is improving significantly** i.e. 17% of those between 20 and 29 years of age have completed less than grade 7. This compares with 29% of those in the 30 to 39 age range, rising to 65% of those 70 and over. The younger the adult, the more likely she is to have received at least a primary education.

3.3 Conditions under which learning take place

We then looked at some data which provides information on the conditions under which education takes place³⁰.

³⁰ Stats SA, General Household Survey 2006

Figure 18: Problems experienced among those attending an educational institution



This indicates that the problems affecting the largest number of learners have been lack of books and issues of affordability. However, both of these problems significantly reduced over the 5 year period covered by the data.

Again, a provincial disaggregation of these issues reveals a very wide range of experiences. In 2006³¹:

- 24% of learners in Eastern Cape have experienced lack of books, compared with 3% in Northern Cape
- 7% in Eastern Cape have experienced a lack of teachers, compared with 1% in Northern Cape
- 15% in Limpopo complained of high fees, compared with 3.5% in Free State

Finally, the very high levels of primary school learners receiving social grants (over 60% in Eastern Cape, Limpopo and Mpumalanga) is indicative of the high levels of poverty in those provinces. As an indication of poverty levels, the threshold for claiming child support grant is earning an annual income of less than R9,600 in urban areas and R13,200 in rural areas.

4. In Summary

South Africa's population of 48 million is predominantly young and black. That is also the character of the adults who are the largest target group for adult education. That group is still suffering from the inequitable distribution of wealth that is apartheid's legacy, being more likely to be unemployed and receiving less schooling, of a poorer standard, than their White counterparts. Despite that, they are more and better educated at school than their fathers and mothers.

³¹ Stats SA, General Household Survey 2006

These potential and actual adult learners speak many languages; for the majority of them, English, the main language of adult learning, is not their first language. They live in areas that differ widely from one another, some with very high rates of HIV and TB and low life expectancy, robbing South African society of large numbers of skilled people it badly needs, others relatively safe from killer diseases and with a life expectancy comparable with the countries of the North. The needs for adult learning programmes inevitably cross a vast spectrum, from the most basic to the most advanced.

Policy, Legislation and Financing

Since 1994 there has been a plethora of legislation which directly or indirectly frames the provision of education and training. This section rehearses the major legislation and provides a short commentary on some of the challenges that are faced in moving from legislation and policy to implementation.

Some *International Policy Initiatives* which provide a context

- Education for All: 1990 (EFA)
- United Nations Literacy Decade: 2003-2012
- Dakar Framework for Action: 2000
- United Nations Decade of Education for Sustainable Development
- Millennium Development Goals
- International benchmarks on Adult Literacy developed by Global Campaign for Educational and Action Aid and commissioned by UNESCO/ EFA Global Monitoring Report: 2005

1. The current legislative framework for provision of adult learning

Education and training policy in South Africa is informed by the following legislation and policy documents³².

- The Constitution of the Republic of South Africa, Act No. 108 of 1996, section 29 (1) states that everyone in South Africa has the right to basic education, including adult basic education.
- The South African Qualifications Authority Act, 1995, provides for the creation of the National Qualifications Framework (NQF), which establishes the scaffolding of a national learning system that integrates education and training at all levels. (There is currently a new NQF Bill that is out for comment which will replace the SAQA Act and which signals various important shifts to the NQF environment.)
- The National Education Policy Act, Act No. 27 of 1996 is designed to identify the policy, legislative and monitoring responsibilities of the Minister of Education and to formalise relations between national and provincial authorities.
- The South African Schools Act, Act No. 84 of 1996 promotes access, quality and democratic governance in the schooling system. It ensures that all learners have

³² Based on DOE Annual Report 2006-2007:11-12

access to quality education without discrimination, and makes schooling compulsory for children aged 7 – 15 or learners reaching the ninth grade, whichever occurs first.

- The South African Council for Educators Act, 2000, provides for the establishment of the Council to undertake the registration of educators, promote the professional development of educators and set, maintain and protect ethical and professional standards for educators.
- The Higher Education Act, 1997 makes provision for a unified and nationally planned system of higher education and creates a statutory Council on Higher Education (CHE), which provides advice to the Minister and is responsible for quality assurance and promotion.
- The Further Education and Training Act, 1998, Education White Paper 4 on Further Education and Training (1998) and the National Strategy for Further Education and Training (1991 – 2001), provide the basis for developing a nationally-co-ordinated system, comprising the secondary component of schooling and technical colleges.
- The Further Education and Training Colleges Act, Act 16 of 2006 provides for the regulation of further education and training, the establishment of governance and funding of public further education and training colleges, registration of private FET colleges and promotion of quality in further education and training.
- The Adult Basic Education and Training Act, 2000, provides for the establishment of public and private adult learning centres, funding for ABET provisioning, the governance of public centres, and quality assurance mechanisms for the sector. (There is currently a Ministerial working group established to develop a Green Paper which is undertaking an analysis of the state of play within the ABET and related environments.)
- Education White Paper on Early Childhood Development, 2000 provides for the participation of 5-year-olds in pre-school reception grade education by 2010.
- Education White Paper on Inclusive Education, 2001 explains the intention of the department to implement inclusive education at all levels in the system.
- The General and Further Education and Training Quality Assurance Act, Act 58 of 2001 provides for the establishment of UMALUSI which is responsible for the provision of quality assurance in general and further education and training, issuing certificates at exit points, control over norms and standards of curricula assessment and conducting the assessment.
- National Financial Aid Scheme Act, Act 56 of 1999, provides for granting and administration of loans and bursaries to eligible students at public higher education institutions.
- National Norms and Standards for Funding Adult Learning Centres 2007, gazette 30576, provides for the norms and standards for funding public adult learning centres and the granting of subsidies to private centres
- National Qualification Framework (NQF) aims to create an integrated national framework for learning achievements; facilitate access, mobility and progression, enhance quality, accelerate redress and contribute to the full personal

development of each learner and social and economic development of the nation at large.³³ Current proposals are that this changes from an 8 level to a 10 level framework to allow for greater differentiation in higher education.

- South African Quality Assurance (SAQA 2000) has three areas of focus: standard setting, quality assurance and electronic management of learner achievements through the National Learners' Records Database (NLRD). In 2007 the Departments of Labour and Education proposed that the standard setting and quality assurance functions of SAQA be shifted to three Quality Councils: the Quality Council for Higher Education (CHE), the Quality Council for General and Further Education (Umalusi) and a new Quality Council for Trades and Occupations.³⁴
- Human Resource Developmental Strategy, 2001, is a joint initiative of the Departments of Labour and Education to reinforce the establishment of an integrated education, training and development strategy to harness the potential of adult learners. (This strategy has not made the progress that was hoped for.)
- National Skills Development Strategy is supported by two Acts, the Skills Development Act of 1998 and the Skills Development Levies Act of 1999. These acts introduced new institutions, programmes and funding policies which aim to equip South Africa with the skills to succeed in the global market and to offer opportunities to individuals and communities for self-advancement to enable them to play a productive role in society.³⁵ There is a new draft Skills Development Bill out for public comment presently.
- The 31 registered Education and Training Quality Assurance bodies (ETQAs) of which 25 are Sectoral Education and Training Authorities³⁶.
- Accelerated and Shared Growth Initiative (ASGISA) and Joint Initiative on Priority Skills Acquisition (JIPSA) of 2006. This is an initiative which brings together interests in speeding up growth in the economy under South Africa's Vice President.

One of the major achievements of the last 12 years is the development of the National Qualifications Framework (NQF) which was to be central to driving the policy of lifelong learning which was implemented after 1994. The NQF brings together education and training as well as skills development. It encompasses early childhood development (ECD), general education and training (GET), adult education and training (ABET), further education and training (FET) and higher education (HE).

The NQF aimed to provide for flexibility of delivery, portability of credentials and recognition of prior learning by promoting modular approaches, expressed through 'unit standards' and registered programmes. To support integration of the various components into a single system, all components, from early Childhood Development to Higher Education, including workplace and vocational education, employ outcomes based approaches. The South African Qualifications Authority (SAQA) Act

³³ Full text in Parker and Walters (2008:72)

³⁴ Parker and Walters (2008:74)

³⁵ Department of Labour (undated) SETAs – *Sector Education and Training Authorities*, Pretoria: DoL:2. (brochure)

³⁶ Parker B and Walters S (2008) Competence based training and National Qualifications Frameworks: Insights from South Africa, *Asia Pacific Education Review* 2008, Vol 9, No. 1, 70 – 79.

established standards, quality assurance systems and management information systems to support the NQF.³⁷

TABLE 7: NATIONAL QUALIFICATIONS FRAMEWORK³⁸

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

Parker and Walters (2008) describe two major changes to South Africa's NQF as moving away from 'standardisation' to 'differentiation' and away from an up-front, design down and prescriptive approach to standards setting to a practice-based, design-up and descriptive approach. There will be a shift from an 8 level to a 10 level NQF to accommodate greater differentiation in higher education. The standards setting and quality assurance functions carried out by SAQA will shift to three Quality Councils: the Higher Education Quality Council on Higher Education (NQF Levels 5 to 10); the Quality Council for General and Further Education (Umalusi) (NQF Levels 1 to 4 – the schooling system and technical colleges); and, the Quality Council for Trades and Occupations (occupational qualifications: NQF Levels 1 to 10). This will allow for the emergence of different sub-frameworks shaped to the needs of each distinct knowledge field and its associated forms of learning within a unitary NQF.

2. Disjuncture between policy intentions and implementation?

This is a very complex question that cannot be answered in this paper; however, we will point to some inhibitors to the implementation of policy intentions which aspire to equity and social justice for the majority of citizens. The first is that policy is at times 'symbolic' in that it lays out ambitious aspirations but then the funding does not follow. A graphic example of this is when adult basic education was made a Presidential Lead Project in 1994, but was dependent for execution on donor funding. 'Unfunded mandates' are a common refrain from many parts of the education system. The government is no doubt influenced in its budgeting priorities by, amongst others, international agencies like the World Bank. (Groener 2007)

³⁷ Department of Education (2001) *Education in South Africa: achievements since 1994*, Pretoria: DoE.

³⁸ EFA Draft Report (2002)

There is serious competition for resources which leads to schooling absorbing the bulk of education funding. This is compounded by the fact that the budget and policies are set at national level and much implementation is provincial. Therefore, if a national intention is to have, for example, ABET funded at a particular level, there is no guarantee that this will be done. There is in fact much evidence that this is not carried through at local and provincial levels.

There had, prior to 1994, been a strong impetus to have an `integrated system of education and training`, in order to attempt to create greater coherence in the system. Part of this intention was captured in the design of the NQF. However, the Departments of Education and Labour were kept as distinct departments and it has been a challenge for these two departments, as well as others, to work together productively. As is usually the case everywhere, the tendency to `silo thinking and working` is very difficult to overcome given the ways that financing, governance and management occur.

The culture of adult and lifelong learning is also very limited. This has long historical roots in the colonial and apartheid systems. The understanding that adults have rights and obligations to ongoing learning is not deeply held. **The intertwined relationship between children's and adults' education is also not fully appreciated and this results in children's and adult learning sometimes being reflected as being in competition with one another.** Funding for advocacy work, in order to help to change these cultural understandings, has not been forthcoming.

The new legislation demanded the setting up of a great range of new institutions that required high levels of capability both at conceptual and practical levels. A great number of new education and training managers were required. These are acknowledged as in short supply. The new policies also required changed behaviour and high levels of competence by educators and trainers, who were generally poorly qualified.

The social conditions of poverty, poor public transport and criminality also work against implementation of policies.

Financing of ALE

Total allocation of government resources to all forms of adult learning is difficult to identify. It is also possible that much is hidden under other funding categories, for example adults in FET Colleges and adults in Higher Education Institutions which are not captured here. However there are two clearly identifiable areas, these are the ABET directorates in provincial and national education departments and the funds paid via the pay roll into the national skills fund.

1. Department of Education funding of ABET

Table 8 below shows the range of actual rands allocated to ABET by the different departments as well the percentage that this amount represents of the total education budget. The table shows that it is not necessarily the 'richer' provinces that have allocated more money and until recently the Eastern Cape allocated more money than any other province. Gauteng is currently investing the largest amount of money, in contrast the Western Cape has constantly allocated one of the smallest amounts of money to ABET.

Table 8: Provincial spending on ABET from 2003 - 2007

	2003/04		2004/05		2005/06		2006/07	
	Amount (R,m)	% of educ. budget						
E. Cape	136.3	1.3	126.0	1.2	136.3	1.2	155.8	1.2
Free State	70.9	1.7	45.8	1.0	93.2	1.9	65.4	1.2
Gauteng	118.1	1.2	138.8	1.4	157.8	1.5	168.1	1.4
KZN	39.6	0.3	49.7	0.4	85.8	0.6	72.6	0.5
Limpopo	28.6	0.3	36.7	0.4	54.1	0.5	50.2	0.4
Mpumalanga	48.9	1.1	53.7	1.1	76.0	1.3	75.5	1.2
N. Cape	21.6	1.7	19.6	1.4	20.0	1.3	23.5	1.4
N. West	54.2	1.1	44.3	0.9	63.6	1.1	83.3	1.2
W. Cape	18.5	0.4	21.2	0.4	23.1	0.4	23.5	0.3
Total	536.7	1.01	535.8	0.91	709.9	1.09	717.9	0.98

Source: National treasury, 2007. Provincial Budgets and Expenditure Review, 2003/04 – 2009/10.

The table below summarises the budget for ABET by province over four years 2003/04 – 2006/07 and the projected amount for the three years 2007/08 – 2009/10. The table shows that there is no plan by provinces to shift their current funding patterns.

Table 9: Summary of provincial spending on ABET 2003/04 – 2006/07 and projected provincial spending for 2007/08 – 2009/10

Province	2003/04 - 2006/07	2007/08 - 2009/10
	Period of 4 yrs	Period of 3 yrs
	Amount (R,m)	Amount (R,m)
Eastern Cape	554.4	486.8
Free State	275.3	226.3
Gauteng	582.8	772.3
KwaZulu Natal	247.7	343.6
Limpopo	169.6	372.3
Mpumalanga	254.1	278.1
Northern Cape	84.7	82.3
North West	245.4	325.1
Western Cape	86.3	82.1
Total	2 500.3	2 968.9
Annual average	625.08 (actual)	989.63 (projected)

Table 9 above shows the large disparity allocated to ABET programmes by the different provinces. Gauteng and the Eastern Cape have allocated considerably more than other provinces such as the Northern and Western Cape. In addition provinces such as Free State, Northern Cape and Western Cape have allocated less per year in their projected budgets for the three year period starting in 2007 than they allocated for the previous four years. A large proportion of the funds goes to funding the public centres (94% in 2005/06, and 95% in 2006/07).

While the above two tables indicate the relative spending of provinces on ABET, they do not indicate to what extent the budget allocation matches the relative need in each province. The following table uses the figures quoted in the final report of the ministerial committee on literacy which are based on 2001 census figures. An

average of the amount budgeted in each province for the four years from 2003 – 2007 was then compared to the estimated number of learners in each province.

Table 10: Comparison by province of amount spent on potential adult learners

Province	2003 to 2007		Potential no. adult learners			Allocation per potential learner
	Total amount in Rands	Average per year in Rands	No schooling	Gr 1 to 6	Total	
E. Cape	554 400 000	138 600 000	778 203	845 637	1 623 840	85.4
Free State	275 300 000	68 825 000	257 140	394 615	651 755	105.6
Gauteng	582 800 000	145 700 000	515 747	742 864	1 258 611	115.8
KZN	247 700 000	61 925 000	1 145 395	1 018 139	2 163 534	28.6
Limpopo	169 600 000	42 400 000	461 508	1 320 189	1 781 697	23.8
Mpumalanga	254 100 000	63 525 000	468 747	328 031	796 778	79.7
N.Cape	84 700 000	21 175 000	91 305	116 296	207 601	102.0
N. West	245 400 000	61 350 000	437 791	497 588	935 379	65.6
W. Cape	86 300 000	21 575 000	167 618	475 461	643 079	33.5
Total	2 500 300 000	625 075 000	4 323 454	5 738 820	10062 274	62.1

Source: MCL final report 2007, National Treasury 2007

Table 10 above shows:

- Gauteng budgeted the most amount in actual rands as well as per potential learner during the time period
- KZN and Limpopo allocated less than a quarter of the amount allocated by Gauteng

A further comparison still needs to be made. This is a comparison of the actual number of learners reached in relation to the amount budgeted and subsequently spent.

2. Department of Labour Funding of the Sector Education and Training Authorities (SETAs)

Tables 11 and 12 below show respectively the funds paid via the pay roll tax into the National Skills Fund (NSF) and the SETAs. It is evident that these institutions receive substantial funding for their training activities. For instance, the total revenue of the NSF in 2006/07 stood at R1.23 billion and was projected to increase to almost R1.5 billion by 2009/10. Similarly, the total SETA revenues reached nearly R5 billion in 2006/07 from R3.6 billion in 2003/04 and was projected to increase to R5.7 billion in 2009/10.

The revenues being generated for the NSF and SETAs on an annual basis are equivalent to half of the public funding for the higher education sector. However, there are serious reservations about whether the NSF and the SETAs are achieving appropriate outcomes in Adult Education and training.

Table 11: Revenue of the National Skills Fund (R, m)

Year	Skills development levies	Other revenue (e.g. interest)	Transfers received	Total revenue
2003/04	755.4	134.7	36.2	926.3
2004/05	945.1	97.8	38.0	1080.9
2005/06	976.7	102.8	40.3	1119.7
2006/07	1100.0	85.6	42.7	1228.3
2007/08	1200.0	75.0	44.8	1319.8
2008/09	1300.0	60.0	46.9	1406.9
2009/10	1365.0	40.0	49.3	1454.3

Source: National Treasury, 2007a

Table 12: Revenue & Expenditure of the Sector Education and Training Authorities (R,m)

Year	Revenue	Expenditure	Surplus (deficit)
2003/04	3593.5	2859.0	735.5
2004/05	4451.5	4270.2	181.3
2005/06	4634.5	4776.4	(141.9)
2006/07	4778.3	5060.1	(281.8)
2007/08	5171.5	5730.8	(559.3)
2008/09	5448.3	5965.1	(516.8)
2009/10	5727.8	6233.3	(505.5)

Source: National Treasury, 2007a

According to Pillay (2008), an economist working in education in South Africa, current provincial funding of ABET is provided on an ad hoc basis. There is a widespread view that ABET, FET and ECD are usually victims of 'residual funding' in the provincial budgetary process. In other words, public schooling is the first priority and once the needs for that sub-sector are determined, only then is funding for the other three sub-sectors determined. Furthermore, in several provinces, there is evidence that funds allocated for ABET, FET and ECD, are often re-directed when there is a crisis in the schooling sector.

To address the challenge of funding ABET in a systematic way, the Department of Education has recently developed 'national norms and standards' for funding this sub-sector. It is intended through these norms and standards that funding of ABET will be programme-based. Funding will be provided via a formula for the public adult learning centres on the basis of learner enrolments and a set of 'prices' for credits. Funds will be provided for both personnel and non-personnel costs.

While a programme-based funding is to be welcomed, there is little in the DoE document, according to Pillay, that reflects how the provinces will actually be persuaded to spend the funds derived through the formula on ABET programmes. Given the inherent tension between policy making at the national level and provincial autonomy on budgetary decisions between sectors (education, health, etc) and within programmes, it is not evident that there will be any significant deviation from current funding practices unless some ring-fencing mechanism is considered.

This section on funding of adult learning has been saying that

1. On average 1% of the education budget has been allocated to adult learning in the form of ABET by provincial education departments.

2. Over 90% of the provincial allocation has gone to PALCs
3. Despite the 'norms and standards' policy of the national education department and the recommendation of 'programme based funding' there is little evidence of this in practice.
4. Funding to adult learning, through the skills levy and a new injection of funding into a national literacy campaign over the next five years, has increased the funding substantially. There is however some concern about quality relating to efficiencies and effectiveness. .

What's happening in the ALE Field

As mentioned previously, since 1994 there have been a number of policies and institutional structures set up to assure quality at all levels of the system of education and training. Presently, there is no data available on quality results, or the extent of successful participation. In the absence of hard data, we provide some indications below.

1. Guidance and Counselling for Adult Learners

There has been very limited provision of guidance and counseling services for adult learners across the system. When guidance and counseling is discussed it most often refers to needs of children. The Dept of Labour does provide some services which relate to employment. At present the SAQA is undertaking an environmental scan across the system to understand what 'navigational tools' can best be provided for children and adults to navigate their ways through the complex education and training systems. This is a crucial although neglected aspect of building a culture of lifelong learning.

2. The National Skills Development Strategy

In February 2001 the Minister of Labour launched the first National Skills Development Strategy (NSDS) for the period 2001 to 2005³⁹. The mission of the NSDS was:

To equip South Africa with the skills to succeed in the global market and to offer opportunities to individuals and communities for self-advancement to enable them to play a productive role in society.⁴⁰

The strategy is supported by two Acts, the Skills Development Act of 1998 and the Skills Development Levies Act of 1999. These acts introduced new institutions, programmes and funding policies.

Sector Education and Training Authority (SETAs) were established to implement the NSDS and to take responsibility for the development of appropriate skills in their sector. Sectors are made up of economic activities that are linked and related, for example the banking sector, the transport sector and the chemical industries sector. For purposes of planning and managing the delivery of training, the economy was divided up into 25 sectors (currently consolidated into 23) each of which had its own SETA. The SETAs cover both public and private sectors.

³⁹ Department of Labour (undated) *The National Skills Development Strategy*, Pretoria: DoL (brochure)

⁴⁰ Department of Labour (undated) *SETAs – Sector Education and Training Authorities*, Pretoria: DoL:2. (brochure)

One of the functions of each SETA is to develop structured learning programmes, taking the form of shorter skills programmes or longer (at least one year) learnerships. Unlike the already existing apprenticeship system, learnerships are available at different NQF levels and are not restricted to artisan training. Originally they were intended to replace the apprenticeship system, although some apprenticeships have survived.

The skills development strategy is funded by employers who contribute monthly. The skills levy is currently 1% of a company payroll, having been introduced at 0.5% for the first year in 2000. It is projected that this levy will raise R21.9 billion during the five years of the 2005 to 2010 plan⁴¹. 80% of this money is allocated to the relevant SETA and 20% to the National Skills Fund (20%) for spending on training programmes for the unemployed. Employers can claim back a proportion of their levy contribution if they fulfil certain criteria. These criteria have changed as SETAs have attempted to raise the performance level of enterprises in relation to training. The requirement in 2000 was the simple submission of a plan of workplace training activities (Workplace Skills Plan). As an example, the current requirement of the Transport SETA is that enterprises:

- have a registered Skills Development Facilitator
- submit a Workplace Skills Plan with evidence that it has been produced in consultation with employees; 20% of all planned activities must lead to formal credits on the NQF (these two requirements are worth 20% of the levy paid)
- submit an Annual Training Report which indicates that 70% of planned training has been achieved and that 40% of the training was SAQA accredited (this requirement is worth 45% of the levy paid).

2.1 NSDS Goals

The objectives of the NSDS in its second incarnation, from 2005 to 2010, changed from those of the first version, from 2001 to 2005. In the following section we have attempted to identify the areas of continuity between the two plans as well as areas in which the second plan moves on from the first.

Unless indicated otherwise, the data in this section for the National Skills Development Strategy 2001 to 2005 (NSDS 1) refers to cumulative figures for the 4 years of the strategy (February 2001 to March 2005). The data for the National Skills Development Strategy 2005 to 2010 (NSDS 2) refers to the two years from April 2005 to March 2007.

2.2 Quantity of learning: numbers of workers participating in learning

NSDS 1 counted all structured learning programmes, without regard to whether they were aligned to NQF qualifications. The results were high:

- 6,261,416 employees (67% of the workforce) participated in structured learning, 99% of whom completed their programmes; an additional 45,141 unemployed people also participated. (These figures refer to headcounts of workers; there are no figures to indicate how many of these represent workers who completed more than one programme)

There is no reliable data on the racial breakdown of these figures. The NSDS 1 Implementation Report for 2005, which also summarises data for the whole of the

⁴¹ Speech of the Minister of Labour
http://www.labour.gov.za/media/speeches.jsp?speechdisplay_id=9977

NSDS 1 period, reports that during NSDS 1, 72% of those trained were black and 40% were women; however the data in this report do not correspond in any way with data from the annual reports of previous years and appear to contain obvious errors⁴².

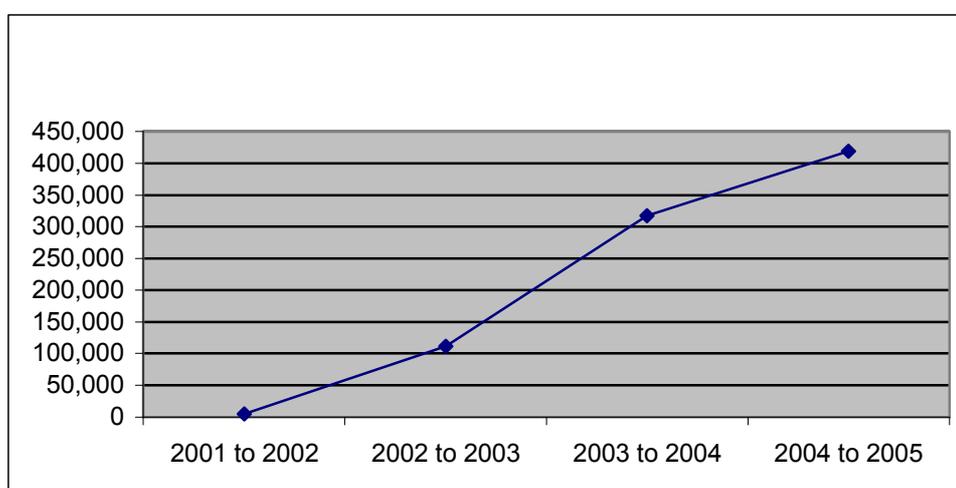
NSDS 2 focuses on learning programmes and studies that are aligned to a qualification; as a result, the numbers are considerably smaller:

- 127,939 employees entered programmes and 51,286 completed.

2.3 Quantity of learning: numbers of workers achieving Level 1

NSDS 1: 852,497 employed workers and 47,189 unemployed people achieved a level 1 NQF qualification; these numbers accelerated rapidly, see Figure 19 below:

Figure 19: Workers achieving Level 1 NQF



This measurement was not continued during NSDS 2, so no comparable figures are available. Further material on this is included below, in a dedicated section on ABET.

2.4 Quantity: Money spent on learning

Table 13 below, from the HRD Review of the HSRC (Kraak et al 2008), shows expenditure on training per employee, according to the size of the enterprise:

Table 13: Expenditure on training by enterprise size, 2003

Enterprise Size	Training Expenditure per trained employee in Rand	Training expenditure per employee in Rand
Small (11-50)	2,398	1,070
Medium (51-100)	2,424	1,025
Large (100+)	4,247	1,864

⁴² For example, the figure for white women jumps from 201,804 in 2002/3 to 1,269,087 in 2003/4 (larger than the number for black women) before falling back to 355,682 for 2004/5

Average	3,691	1,613
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As the authors note: “Unsurprisingly, the above suggests that larger firms tend to spend considerably more on training per worker. Of interest is that there is not a great difference in expenditure per trained employee between medium and small enterprises”.

2.5 Quality: at enterprise level

NSDS 1: A national standard was set for “enterprise-based people development”; the standards of the UK-based company ‘Investors in People’⁴³ were adopted:

- 550 enterprises committed to the standard but had not yet achieved it
- 100 enterprises both committed to and achieved the standard

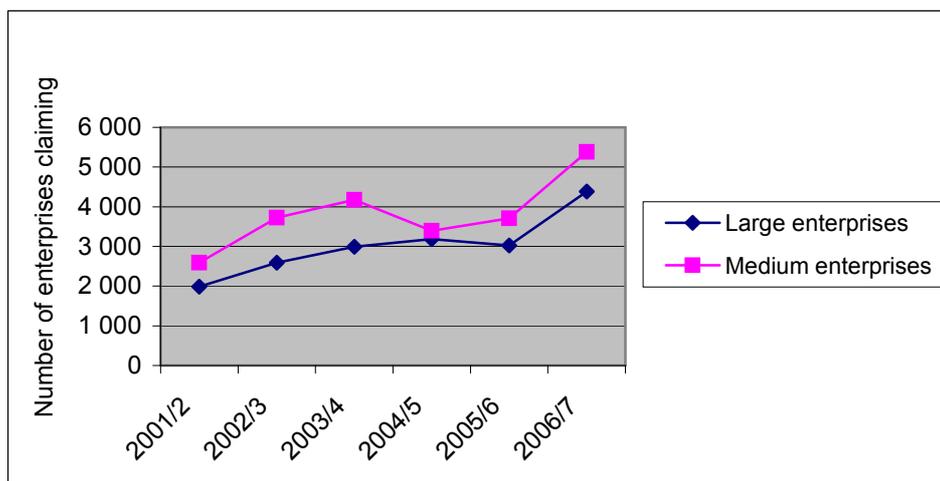
NSDS 2: the strategy “requires the development of a policy framework for a national standard of good practice in skills development”; however the 2007 report indicates that this has been deferred pending the exploration of policy options.

2.6 Quality: at provider level

NSDS 2: the strategy requires SETAs to support ‘Institutes of Sectoral or Occupational Excellence (ISOEs)’, “whose excellence is measured in the number of learners successfully placed in the sector and employer satisfaction ratings of their training”. Whilst there is not yet any standard definition for an ISOE, 507 ISOEs have so far been recognized and supported.

Enterprise participation in SETA-supported Learning Programmes

Figure 20: Large and medium enterprises claiming grants

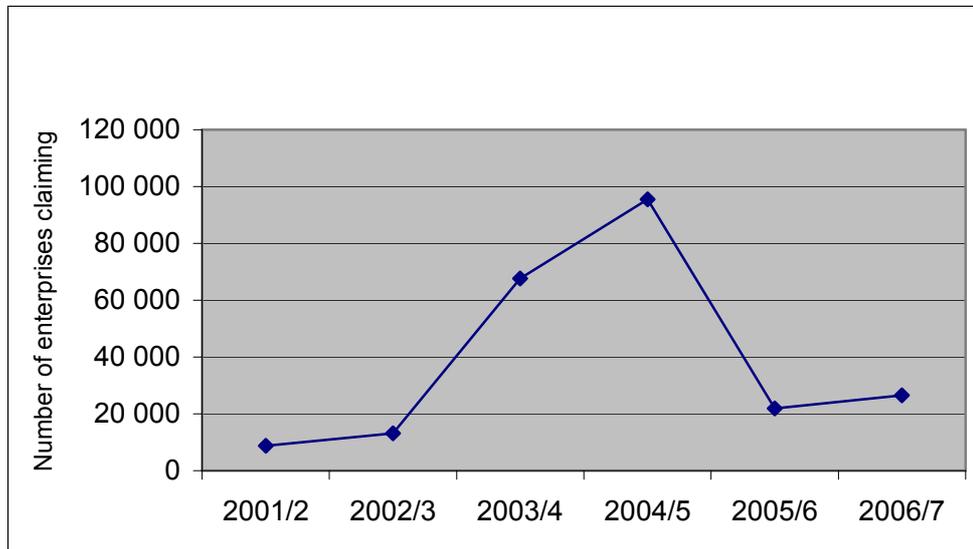


As evidence of the participation of enterprises in skills development, the general trend here is for the participation of both large and medium enterprises to increase. So, grant claims have increased for large enterprises from 1,984 enterprises claiming in 2001/2 to 4,385 in 2006/7 and for medium enterprises from 2,591 enterprises claiming in 2001/2 to 5,380 in 2006/7. Both large and medium enterprises

⁴³ www.investorsinpeople.co.uk

experienced a year in which their participation dropped before picking up again. It is likely that this was caused by the tightening of conditions under which grants were allocated. It is significant overall that the numbers of participating enterprises have increased as much as they have whilst at the same time grant criteria have become significantly more onerous.

Figure 21: Small enterprises claiming grants

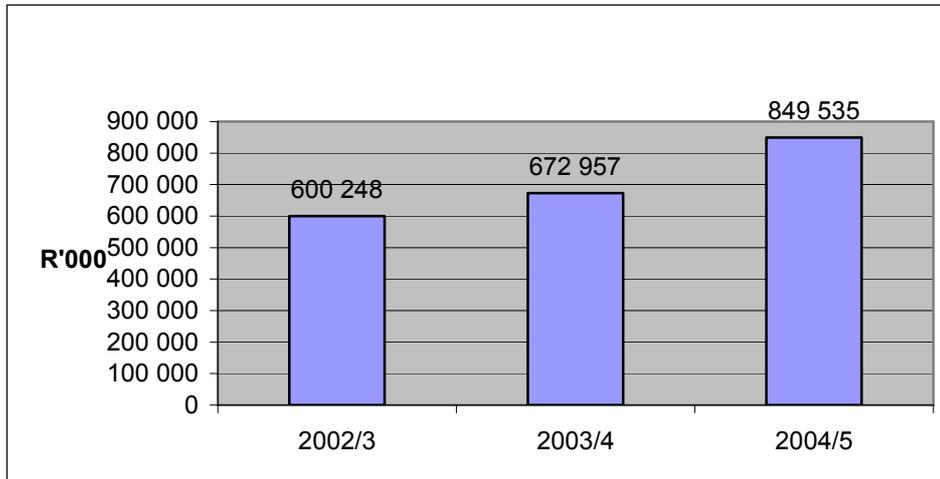


As with the larger enterprises, smaller enterprises experienced a year in which grant allocations dropped. However, in this case the drop was much more significant (from over 95,000 grant allocations to less than 22,000 in the space of a year). It is likely that this is attributable to the increase, in March 2005, of the exemption limit for small enterprises from a wage bill of R250,000 to a wage bill of R500,000. In effect this means that a very significant number of small enterprises were newly exempted from paying the Skills Development levy and therefore concomitantly relieved of the responsibility of claiming a proportion of it back.

2.7 Public Sector

Figure 22 quantifies public sector expenditure on training for 3 years of NSDS 1.

Figure 22: Public Sector Training Expenditure

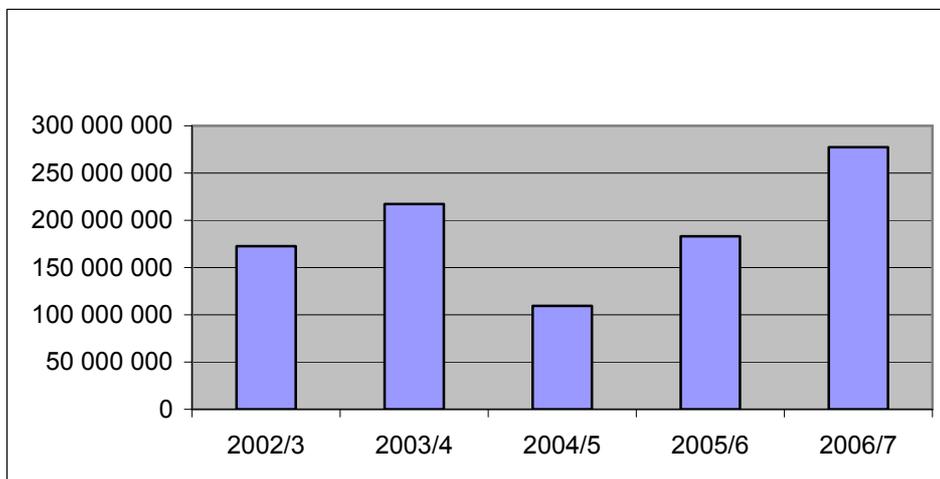


No reliable data is available for NSDS 2: the figure recorded for 2005/6 is identical to that for 2004/5 and therefore an obvious error. Figures are not available for 2006/7. The amount spent in 2004/5 is assessed as 1.84% of the salary bill for the public sector.

2.8 Learning and the Unemployed

Figure 23 below identifies the amount spent from the National Skills Fund. This fund represents the 20% of the Skills Development Levy allocated to training unemployed people.

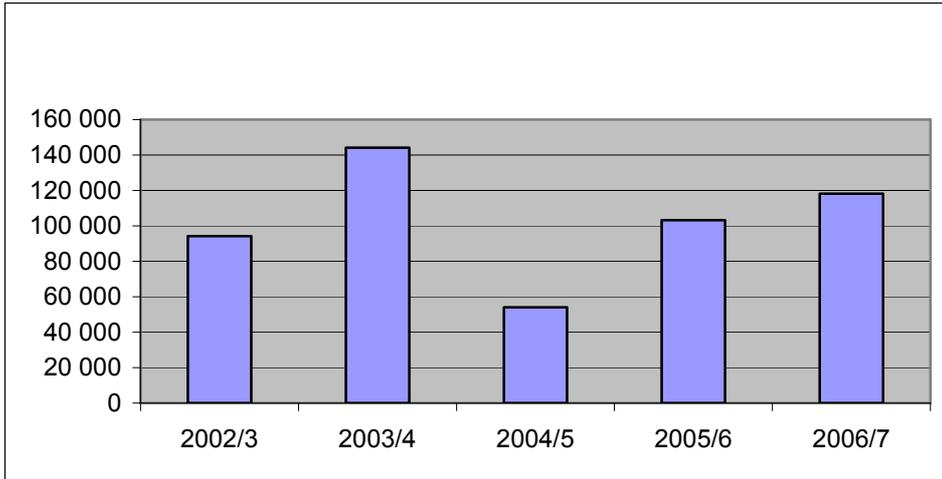
Figure 23: Expenditure on Training the Unemployed



There was a very significant drop (almost exactly 50%) in the expenditure between 2003/4 and 2004/5. NSDS 1 indicates that this was caused by the introduction of a new training contracting system, as a result of which the awarding of training contracts took place very slowly.

Figure 24 below indicates the numbers of unemployed people receiving training:

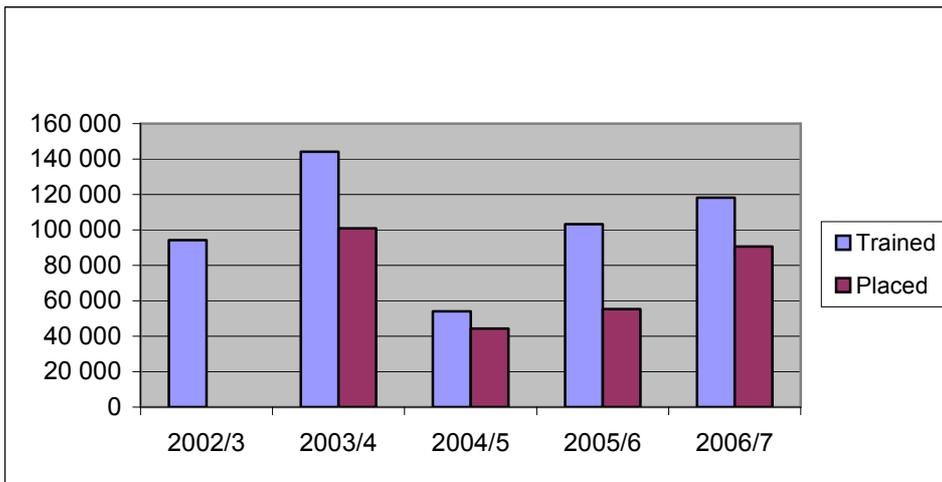
Figure 24: Numbers of Unemployed Trained



The drop in 2004/5 mirrors the decrease in expenditure recorded in Figure 24 above.

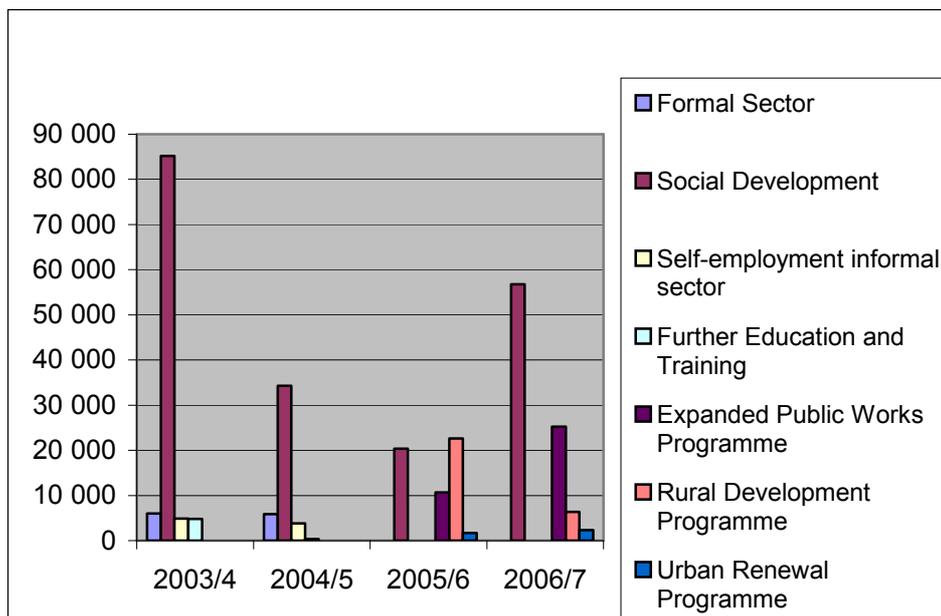
Figure 25 below indicates the numbers trained compared to those placed in some kind of identifiable economic activity after training:

Figure 25: Unemployed Trained and Placed



No figures are available for placement for 2002/3. The economic activity of placement is differently recorded for NSDS 1 and NSDS 2. Figure 26 below combines the data available for the two strategies:

Figure 26: Trained Unemployed Placements

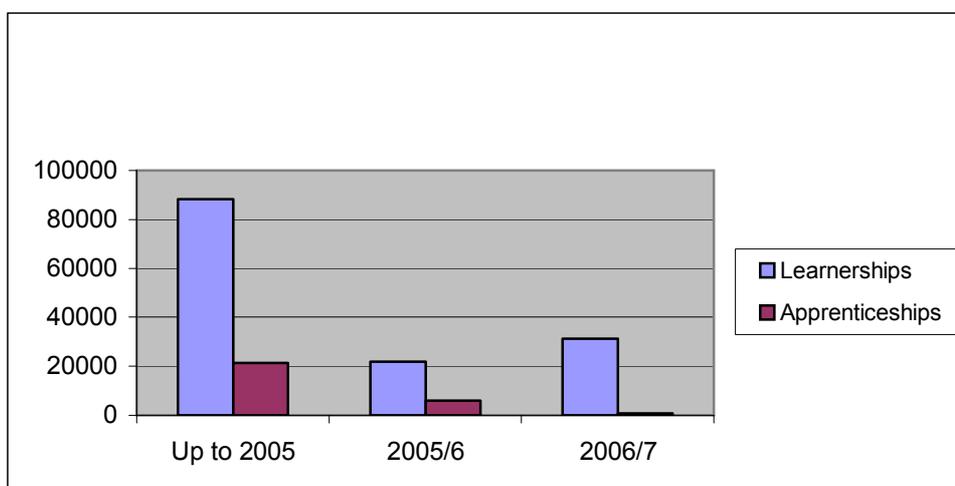


By far the most significant destination for trained unemployed people is the category 'social development', a category described in the 2006/7 implementation report as catering for "programmes and projects in the communities.....aimed at alleviating poverty and reducing the level of unemployment". No explanation is given in the report for the very significant drop in the number placed in Rural Development Programmes between 2005/6 and 2006/7.

2.9 The Unemployed: Learnerships and Apprenticeships

Through the SETAs, unemployed people are also funded to undertake learnerships and apprenticeships:

Figure 27: Unemployed entering learnerships and apprenticeships



Prior to the mid 1990s, apprenticeships, artisan and occupational training and skills development were largely located in the public sector and in the mining and construction industries. For example, the state was responsible for the majority of apprenticeships through ESKOM (electricity generation and supply), ISCOR (state-owned iron and steel producer), Defence Force and Transport (railways, roads, harbours).

Some significant observations

In a presentation at the beginning of 2008, the Research Director of SAQA made some pertinent comments on overall trends in skills training⁴⁴:

- The Dept of Labour (DoL), with the participation of organised labour and business through the SETAs, has undertaken a large-scale privatisation of training and skills development.
- The Dept of Education has become the guardian of public education, while the DoL has overseen the emergence of a private occupational training and skills development sector
- In the mid-1980s, there were as many as 80 000 apprentices in training in a year.
- By the mid-2000s, there were as few as 5 000 apprentices in training in a year. (Parker 2007)

2.10 Reflections on the success of the NSDS

There are currently various research undertakings to assess the value and achievements of the NSDS. It is therefore too early to be able to say anything definitive. However, one small study (Roodt 2007), undertakes a qualitative study of 6 Coloured working class women, to explore how the NSDS has affected their lives. The study does suggest that if it was not for the NSDS, with its policies and taxation of employers, these women would not have obtained their training which has led to substantial increases in their levels of self-confidence and changes in job situations. The study highlights how, for black working class women, physical and psychological violence is endemic and they have to overcome the impact of the violence and subordination, to which they are subjected, to progress educationally and socially. The NSDS helped them to do this and the study may be suggestive of some positive effects.

2.11 Scarce and Critical Skills

An innovation of NSDS 2 was the compilation of national lists of scarce and critical skills. This exercise, carried out through research projects undertaken by the SETAs, was designed to focus training on skills particularly required for economic development. "Scarce skills are usually measured in terms of occupation or qualification...while '*critical*' skills refer to particular capabilities needed **within** an occupation"⁴⁵ This list, and sectoral versions produced by the SETAs themselves, is used to direct SETA discretionary funding. Significant resources have also been put into communicating the lists to enterprises and potential learners through training and information programmes for Skills Development Facilitators.

⁴⁴ Evaluating the impact of the NQF on LifeLong Learning: Training and Skills Development, Ben Parker, Research Director, SAQA, PowerPoint presentation

⁴⁵ From the foreword to the first *National Master Scarce Skills List for South Africa*, DoL, www.labour.gov.za/download/11693/Useful%20Document%20-%20NSF%20-%20National%20Scarce%20Skills%20List.doc

3. Expanded Public Works Programme

The Expanded Public Works Programme was launched in 2004. Its aim is “to draw significant numbers of unemployed people into productive work opportunities, accompanied by training, so that they increase their capacity to earn an income⁴⁶”.

The programme works in four areas

- (i) **Infrastructure:** it focuses on promoting the use of labour intensive methods in infrastructure projects
- (ii) **Environment:** it aims to provide work in improving local environmental conditions
- (iii) **Social:** It channels unemployed people into public social programmes
- (iv) **Economic:** it promotes the development of small businesses and co-operative

Its specific objectives were to provide just over 1 million ‘work opportunities’ and 15.5 million person-days of training.

Its quarterly report for April to September 2007 records that, with 70% of its 5 year period complete, it has achieved 77% of its work opportunities target, but only 23% of its training target. Its aim was to provide 2 days of training for every 22 days worked. Clearly, the provision of training has been more difficult than providing the opportunity to work, leaving it open to criticism that the work opportunities it creates will be more temporary than permanent.

4. Adult Literacy and Adult Basic Education and Training (ABET)

4.1 Kha Ri Gude literacy campaign

The final report of the Ministerial Advisory Committee on a mass literacy campaign for South Africa of April 2007 provides a plan to reduce the level of illiteracy in South Africa. The strategy outlined aims to reach 4.7 million illiterates (those who have never been to school) and 4.9 million functional illiterates (those who dropped out of school before grade 7) by the end of 2012. Reaching these targets will enable South Africa to meet the commitment made in Dakar to reduce illiteracy by at least 50% by 2015 and to be declared ‘free from illiteracy’ by UNESCO. The report gives a preliminary costing for the period 2007 to 2012 of R5.47 billion at a learner cost of close to R1,300.

The campaign, known as Kha Ri Gude, was launched during May 2008 with an initial target of 300 000 learners. Disabled learners have specifically been targeted. Volunteer facilitators receive ten days of training and will receive a stipend. Learner books have been produced in all official eleven languages, plus sign language, using a teaching method which combines language experience and phonics. The programme consists of seven themes and includes numeracy.

⁴⁶ Expanded Public Works Programme, 2nd quarterly report, year 4, 1st April to 30th September 2007, Department of Public Works

This is a major achievement of the Minister of Education, as there have been two previous attempts in the last 12 years to fast track adult literacy initiatives, with limited results. **This is the first time that the Treasury is allocating serious funding for adult literacy.**

4.2 Level of participation in ABET

ABET has taken place in Public Adult Learning Centres under the Dept of Education, and is most often linked to schools. There is disquiet about the achievements of the ABET system which has led to the Minister of Education establishing a Task Group in August 2007 to develop a Green Paper for the Revamping of the Adult Education and Training System.

Table 14 below tracks the number of learners over a seven year period and indicates that the number of learners and educators remained constant until 2003 with a considerable increase in 2005, albeit from a small base. (Author note: We are not satisfied with the ABET figures currently and are continuing to try to verify these.)

4.2.1 ABET Provision by Public Adult Learning centres

Table 14: Number of ABET learners, educators and institutions in South Africa

	No. PALC*	Educators	Learners
1999	2 226	16 089	150 024
2000	1 911	16 537	96 132
2001	2 527	12 374	139 961
2002		13 099	
2003	1 367	21 510	145 039
2004			
2005	2 278	17 181	269 140

(Baatjes: 2008:214 and DOE Education Statistics in South Africa at a Glance)

*Number of Public Adult Learning Centres

Baatjes (2008:217) gives the following figures for ABET level 4 examinations based on information from UMALUSI 2003 ABET report. Unfortunately he does not indicate how many people passed or whether this was the number of candidates for the full qualification or for single learning areas.

Table 15: Number of ABET learners by level

	ABET 1	ABET 2	ABET 3	ABET 4	total
1999	50 990	37 399	29 858	31 777	150 024
2000	25 482	22 423	23 235	24 992	96 132
2001	39 052	32 144	33 296	35 469	139 961
2002					
2003	35 164	32 865	28 969	48 041	145 039

Baatjes (2008: 217)

Table 16: Number of GETC certificates (NQF level 1) issued by UMALUSI in 2005 & 2006

	Full GETC ABET level 4	Learning area certificates ABET level 4
2005	1 719	26 779
2006	985	29 488
Total	2 704	56 267

(UMALUSI 2008:5)

The data from Baatjes (2008) is difficult to correlate with the data from Umalusi (2008:6) which indicates that from 2003 – 2007, only 9 766 people achieved an ABET level 4 (NQF Level1) qualification.

4.2.2 ABET provision by SETAs

National Skills Development Strategy (NSDS) Implementation report 2007 discusses two success indicators and provides some data on the extent to which these have been met.

Success indicator 2.7: By March 2010 at least 700 000 workers achieved at least ABET level 4. The total two-year achievement against this target is 12 748

Table 17: Results of success indicator 2.7

Five-year target	Year	Target	Achievement	%	Total two year achievement against 2010 target
700 000	2005/06	41 588 enter ABET	35 187 have entered ABET	85%	Total entered: 81 282 (11%)
	2006/07	60 652 enter ABET	46 095 have entered ABET	29%	
		43 612 complete ABET	12 748 have completed	29%	Total completed: 12 748 (2%)

Source: NSDS (2007:18)

Success indicator 3.3: by March 2010, at least 100 000 unemployed people have participated in ABET level programmes of which at least 70% have achieved ABET Level 4. The NSDS (2007:27) report records that the department has approved seven projects to roll out the first phase of the national ABET programme and that R37.8 million had been paid to providers to train 20 000 unemployed ABET learners. This programme commenced in the first quarter of 2007 and that planning was in process for the second phase which would target a further 40 000 learners.

The NSDS report (2007:24) mentions a social development funding window initiative (SDFW) and that R 584 million was allotted for the training of unemployed and under employed persons. From this R334 million was allocated to this initiative and the report records that 51% (R 277.5 million) of the money was spent. An amount of R52 million was spent on training programmes for unemployed people linked to EPWP projects. Of interest to this paper is a comment (2007:53) which states that unemployed learners attending SDFW programmes are entitled to a daily learner allowance of R30 per training day.

Table 18 : Beneficiaries of NSF projects on ABET or NQF level 1 training

SETA	Nature of Intervention	No. beneficiaries	
FASSET	Maths and Accounting Clinics at school level	36138	benefited
Chieta	ABET for Chemical industry	6040	completed
Foodbev	ABET for employed	1099	completed
MQA	ABET for miners	1090	completed
	other	3226	in trg
Paeta	ABET for workers in primary agriculture	419	completed
SETASA	ABET	1791	completed
Theta	ABET learners in tourism industry	194	completed
CTFL	ABET learners	1446	in trg
TETA	ABET in small boat fishing industry	418	completed
	TOTAL	51861	participated

National Skills Development Strategy Implementation report 1 April 2004 - 31 March 2005:11

SAQA provided the following data

Table 19: Number of ABET learners by SETA

ETQA	Number of Learners	Notes
CHIETA	1505	
ESETA	21	
ETDP SETA	304	
FIETA	131	
FOODBEV	2270	
HW SETA	2735	
MQA	9592	
SAS SETA	9	
SERVICES	6605	
TETA	806	
UMALUSI	120243	Not a SETA. All of these learners submitted by Independent Exam Board (IEB)
Total	144221	

These figures all indicate a low level of participation in ABET learning by the SETAs.

5. Further Education and Training (FET)

Further Education Colleges and Vocational School Leaving Certificate

The Department of Education introduced the vocational arm of a school leaving certificate in 2007. The National Certificate (Vocational) is an alternative to the academic programme offered at high schools. Both the academic and vocational further education programmes last three years and result in a school leaving certificate that can lead to higher education⁴⁷. The new qualification is offered at FET Colleges which traditionally have attracted learners not suited to more academic courses.

Learners at these colleges span a larger age range than those in high schools which makes them ideally suited to accommodating the needs of youth requiring a second chance to complete their schooling. The National Certificate (Vocational) NC(v) is designed to combine theory and practical experience in one of eleven vocational fields. The fields are all high in demand and are clustered into: tourism, finance, electrical, infrastructure and construction. The practical component may be offered in a real or simulated workplace. At each level students are required to do a language, mathematics or mathematical literacy, life orientation and four vocational subjects. The department has set aside R600 million over three years for bursaries specifically aimed at the 16-22 year age group. The funding will be allocated according to where learners are situated.

There are 50 Further Education and Training (FET) colleges in South Africa, each with a number of campuses with many of the campuses in rural areas. Colleges were required to indicate the courses they were interested in offering and to set themselves enrolment targets. According to Vinjevold, 25 059 students (89.7% of the

⁴⁷ Department of Education (2006) Further Education and training: A guide to opportunities for further learning and presentation by Ms P Vinjevold (Deputy Director General FET) at the HSRC FET conference (2006)

target) were enrolled in January 2007 into the first year (NQF level 2) of the new certificateⁱⁱ. The target for NQF level 2 for 2008 is 40 000. The breakdown of the national learner numbers registered in March 2007 was as follows: Engineering – 50.3%; Business Studies – 32%; Information Technology – 8.1%; Tourism – 7.9% and agriculture 1.7%⁴⁸. These numbers reflect similar patterns to other programmes offered by FET colleges.

Figure 28: Age of learners attending FET colleges

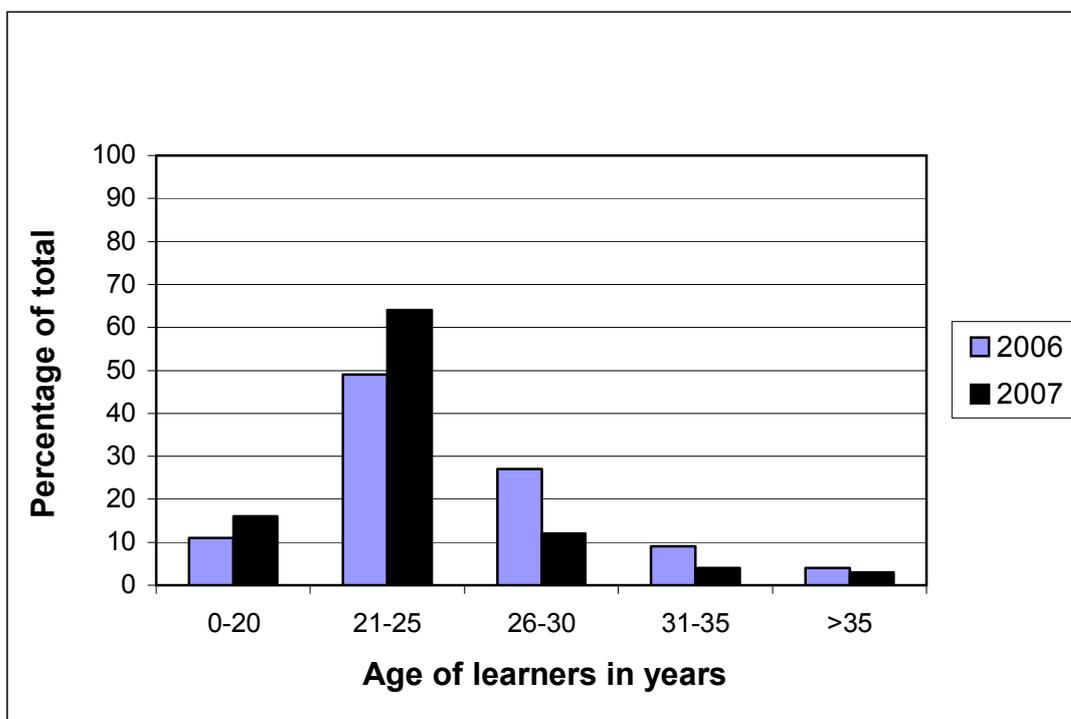


Figure 28 above reflects the proportion of young learners attending further education and training colleges in South Africa. As the table shows there is a shift in one year from 60% of learners being in the 0-20 and 21–25 year groups to 80% being in these age categories. The proportional increase in learners under the age of 25 years in 2007 reflects the impact of the newly introduced national certificate (vocational). This new qualification has brought younger learners into FET colleges who see this as an alternate route to a conventional academic school leaving certificate, but has forced a re-focus on the main learning activity of FET colleges.

6. Adults in Higher Education Institutions

Research into this area in South Africa is sparse. This section is based on research published in 2007. Whilst it focused on 3 institutions, University of Western Cape (UWC), Vaal University of Technology (VUT) and University of the Witwatersrand (Wits), it also analysed general university enrolment and produced a statistical overview. (Buchler et al 2007) Another example of the range of adult learning related activities within an HEI is the Social Responsiveness Report of University of Cape Town, 2007.

The study based its approach on a definition of adult learner as one who is 23 years or older, not because it regarded this categorisation as entirely satisfactory but for the

⁴⁸ Own calculations based on data from Department of Education (FET)

very practical reason that, “Current policy regulates that from the age of 23, people are able to obtain ‘mature age exemption’, which means access to higher education without a Matriculation Endorsement [for University Entrance]”.

The most interesting data to emerge from the stats is the fact that over 50% of learners in the higher education system are adults, studying at undergraduate levels, which is similar to many other countries of the world.

In Confintea V a resolution was taken about the promotion of higher education institutions as lifelong learning institutions. This was followed up and a conference was held in Cape Town in 2000 which produced a framework of characteristics for lifelong learning higher education institutions. This has been translated into multiple languages and distributed through the Unesco Institute for Lifelong Learning (UIL). This framework has influenced some of the HEIs in South Africa, in particular the University of Western Cape. (DLL 2001)

6.1 Some Statistics

The statistical database of the National Department of Education (the Higher Education Management Information System – HEMIS) revealed a surprisingly high proportion of adult learners:

Table 20: Total adult students and year-on-year increases / decreases

Year	Adult Student Numbers	Percentage as proportion of total student numbers	
1999	328,375	59%	
2000	341,097 (+12,722)	58%	(-1.1%)
2001	354,611 (+13,514)	55.6%	(-2.4%)
2002	381,581 (+26,970)	54.4%	(-1.2%)

Source: HEMIS

Further disaggregation by age produced this picture:

Table 21: Students in Public HEIs in 2002

Age cohort	Total students		Number of students at distance education institutions		Number of students at contact institutions	
< than 23	293,579	(43.5%)	40,742	(6%)	252,837	(37.4%)
23-25	102,955	(15.25%)	28,915	(4.3%)	74,080	(11%)
26-29	56,286	(8.3%)	36,594	(5.4%)	19,690	(2.9%)
30-34	79,718	(11.8%)	36,900	(5.5%)	42,818	(6.3%)
35-39	60,792	(9%)	25,187	(3.7%)	35,605	(5.3%)
40-44	42,445	(6.3%)	14,946	(2.2%)	27,499	(4.1%)
45-49	25,076	(3.7%)	7,457	(1.1%)	17,619	(2.6%)

Source:HEMIS

It is possible that by a more rigorous definition of 'adult learner', one which included a significant period out of full-time education between secondary and tertiary education, during which many of the social and economic responsibilities of adulthood are assumed, the numbers in Table 21 above would reduce. But they still remain substantial.

During the process of compiling this document, Salma Ismail, an academic working with part-time adult learners made the following observation:

We (at our university) find it very difficult to retain students because there is no proper financial support from the state or university and we rely on donor funding in particular from the DVV. These funds are appreciated but do not allow us to expand our programme.

In addition the adult learners on the Diploma, Certificate etc do not qualify for bursaries because they are working adults (state and university policy) nor for the loans as they do not meet the criteria for the NSFAS loan and either fall below or above the means test also many do not want to take up loan either they are already in debt or averse to debt .

Somewhere in the submission this factor should be made highlighted as a factor inhibiting adult learning and prejudicing higher education in favour of young graduates just out of school.

6.2 Case Study Analysis

Buchler et al's (2007) research tended to reveal a picture of the typical adult learner in higher education institutions as:

- Socio- economically lower middle class
- Black and first generation at a university level of education
- Married or with family responsibilities
- In full-time employment

The approach of different universities to the accommodation of adult learners was analysed with different institutions setting up various structures to deal with this.

Other general developments noted included:

- A "sharp increase" in the provision of continuing education courses, although there were no statistics available
- The development, on a limited scale, of degree courses focused specifically on adults in the corporate sector

An illustrative case

Finally, it is worth quoting at length the case study of an individual from this analysis because it captures, more graphically than statistics can, the dilemmas of adult learners in South African universities. It highlights, a nexus of material problems, institutional and pedagogical challenges. It shows the lack of synergy at times between experiences in workplaces and HEIs:

Joe (not his real name) was admitted under 'age exemption' regulations (at the age of 28). He had good results in his matriculation or school-leaving examinations, but no matriculation exemption [giving him University Entrance]. He took a six-month certificate course at the University of Western Cape (UWC) three years after leaving school. He was asked to submit a salary slip as evidence of his ability to pay his fees.

Joe described a nexus of material problems around finance, transportation and security. He had expected to be able to use taxis to and from UWC, allowing his wife to use the family car. However, he found that he needed to stay late after classes finished in order to use the library and computers and his wife felt it was unsafe to fetch him so late. As a result, he felt compelled to buy a second car. This has prejudiced his financial situation, resulting in him currently being behind with his fees. He doesn't qualify for bursaries as he did not get the required 65% average. He was unaware that NSFAS had extended its scheme to part-time students.

Joe's employer (a large company in the wine industry with 7,000 employees) offers loans at 2% below bank rates for employees studying in areas related to their work, with 50% of the sum advanced being written off when the student successfully completes. As a production scheduler, Joe's study of law was not considered to be relevant to his job, although he expressed aspirations to working in the company's small legal department.

Joe has unreliable access to computers. He has a computer in his office at work but does not get much undisturbed time to use it for his studies. He described a complex juggling act required to ensure sufficient access to a computer. His employer has now announced the intention to remove all 'A' drives from the computers, as they are not required for work. This will make his computer access significantly more difficult as it will affect the portability of his work.

Joe experienced himself as having "wrong study methods" and it took him time to find his feet. He took a month of leave that he had accrued at the beginning of the programme. In retrospect, he feels he should have kept a lot of that leave to use around examination time and at other pressure points. He could have done with guidance and counselling from the beginning. His lecturer had informed the class about the Writing Centre and, although he had little time, he tried to use it. However, he had been told that it would only be possible after hours if a number of students wanted to use the service. His lecturer had no consultation times after hours. "For me there is no support for part-timers; there's plenty if you are full-time."

Joe's experience was that the lecturers understood his problems as a part-time student; in fact, his experience was that the majority of them were, themselves, part-time students. He found the practice of advance e-mailing of notes by one lecturer helpful, because he arrived in the lecture having studied the notes, able to listen and engage, because he didn't have to copy or note.

Joe would have benefited from having key course information ahead of time so that he could plan his study life in relation to other pressures he faces at work and at home. The student attributed "50%" of his lack of success in the first semester to this lack of administrative and academic support. He failed one of his four courses.

7. Non-Formal Education (NFE), Continuing Education (CE) and Continuing Professional Development (CPD)

Since 2000 the government has introduced a suite of Professions Acts which provide for the progressive introduction of mandatory Continuing Professional Development (CPD) for the purposes of renewal of professional registration. For the first time continuing education is a requirement for re-registration of certain professionals, as with the Health Profession Council of South Africa. (Walters 2006) The Medical Councils, for example, introduced compulsory CPD for all medical practitioners in 2000.⁴⁹

⁴⁹ Information accessed from website for Pharmacy Interns in KZN, Accessed 7 May 2002: <http://www.kznhealth.gov.za/interns2.pdf>

Professionals working in allied medical fields such as pharmacists as well as doctors are now required to attend a range of courses each year in order to retain their licence. The scale of the take up of CPD is not known. There is a proliferation of private and public institutions that are offering continuing education of various sorts. There is an important development within higher education to begin to assure the quality of continuing education run through the institutions.

As Walters (2006) describes, within Civil Society Organisations (CSOs) there is a range of informal, non-formal and formal learning activities. There is no comprehensive source of data for civil society organisations. In general terms, many dedicated adult literacy and basic education organisations have been forced to close through lack of funding. Much of the innovative curriculum work they had developed has been lost. The field is serviced by a few institutions like the NGO, Project Literacy, and institutions like the ABET Unit at UNISA, and the Centre for Adult Education at University of KwaZulu Natal. Many new, issue-focused CSOs have been started around, for example, HIV/AIDS, anti-violence against women and children, anti-globalisation, homelessness, poor service delivery, anti-crime and so on. Informal and non-formal learning are integral to the ways many of these organisations operate. There are many initiatives, as demonstrated by, for example, the Study Circles Project of Idasa. (Putu 2007)

HIV/Aids training⁵⁰ responses are widespread through business, government and civil society. New funding is being made available through international and national sources to support health, education and support services. There are at least 600 civil society organisations working to stem the tide, and the social movement, Treatment Action Campaign (TAC) has attained a range of outstanding results in terms of advocacy and education. There are processes of mainstreaming HIV/Aids into the school, further and higher education curricula. There are community mobilisation campaigns and development strategies. Faith based organisations are also involved in educating their communities. There are multiple approaches being used that include awareness raising, counselling services, and provision of other support. (See Steinberg 2008) The organised workers, through for example the Workers Colleges, also continue to educate and train workers for leadership through Ditsela, an umbrella training organisation. (See for example Linda Cooper's work in this area.)

There are no co-ordinated figures for the numbers of people engaging in NFE, CE or CPD activities. In recent papers (Walters and Daniels 2007, Morrow 2007), the range of CE courses is described, as captured on the SAQA database, and the underlying assumptions about knowledge are pointed out. They argue that the emergence of the dominant discourse of `short courses` as opposed to continuing education or non-formal education, contributes to the tendency towards the fragmentation and `commodification` of knowledge and learning.

8. Adult Educators and NQF

Table 22 below is based on data obtained from SAQA. A search on the SAQA website for qualifications registered under the learning field `adult learning` yielded 41 different qualifications. Sixteen of the qualifications, all above level 4, were not necessarily aimed at people educating adults, for example an advanced certificate on environmental education and a masters degree on education law. To avoid excluding a relevant qualification all 41 listings have been included in this table.

⁵⁰ Special Edition of Perspectives in Education July 2002 Vol 20 No 2. University of Pretoria.

Table 22: Number of ‘adult learning’ qualifications listed at SAQA

NQF level	No. Registered	ETQA		ETQA not listed	No. enrolled	No. achieved
		ETDP	CHE			
1	1	1				
2	1	1				
3	1	1				
4	7	6		1	236	15
5	10	2	8		1	
6	6		5	1		
7	2		2			
8	13		13			
Total	41	11	28	2		

Source: SAQA(2008) – (NB still waiting for details on enrolled and achieved)

The Employment of Educators Act (1998, p.4 [v]). that governs employment in education, including ABET educators, identifies all educators as “educator” means *any person who teaches, educates or trains other persons or who provides professional educational services, including professional therapy and education psychological services, at any public school, further education and training institution, departmental office or adult basic education centre and who is appointed in a post on any educator establishment under this Act.*

As Farrell Hunter of the Adult Learners Network observes, the impression created is that all educators in the education system are deemed to be of equal status and based on their qualification they would mostly be treated the same. However only a small percentage of ABET educators across the country enjoy full time employment and most are employed on one-year employment contracts (renewable). Therefore, unlike most full-time mainstream school educators and educators at colleges, universities and universities of technology, the majority of adult educators, due to their part-time status, do not enjoy any job security or benefits that are enjoyed by other educators. This presents serious challenges to presenting ABET as a career option and in the past the sector has had to rely on “die-hard” loyalists to be the educators for the sector. (Figures of adult educators registered from the SACE are awaited.)

It is not unreasonable to expect that if the National Literacy Campaign is the success that is hoped for, there will need to be a dramatic increase in the numbers of adult educators who are trained. International experience is that the more education people acquire the more they seek it out. The Literacy Campaign could draw a large number of adult learners into the system for the first time and there is concern from SAQA that there is both quality provision and, that in line with the objectives of the NQF, there are opportunities for access and mobility across the system.

Qualifications for adult educators and trainers are mainly offered through the higher education institutions. Research is needed in order to provide the data on the numbers of qualified adult educators, those in training, and the potential capacities of the educational institutions to expand delivery if required.

Research

There have not been the resources to conduct a study, in the limited time available, of the relevant research that has been undertaken relating to adult learning, including human resource development, capacity building, continuing education, community development and skills training. As the financial support for research in this field is very limited, it is fair to say that there is a dearth of well researched materials on adult learning in South Africa and it is mainly linked to post-graduate degree study. The Human Sciences Research Council (HSRC) has done important research which has led to the publication of the Reviews of Human Resource Development (2003 and 2008) and the National Research Foundation (NRF) supports research in the field to a limited extent. The numbers of Departments of Adult and Continuing Education at the HEIs has decreased, with only the Centre for Adult and Continuing Education (CACE) at University of Western Cape (UWC) and the Centre for Adult Education at University of KZN, surviving. Adult learning has become incorporated into various other structures like the Centre for Higher Education Development (CHED) at UCT, the Division for Lifelong Learning at UWC, or as programmes in Faculties or Schools of Education. The idea of developing research hubs at the various HEIs, specialising in various aspects of adult learning, is being mooted and is an important idea which needs further exploration and funding support.

Preliminary searches for Masters and Doctoral theses reveal categorisation of research into `adult education`, `skills`, `staff development`, `professional development`, `workforce training`, `health education`. A range of current research relating to work and learning was captured in the international Researching Work and Learning conference held in Cape Town in 2007 (see <http://rw15.uwc.ac.za>). A significant number of doctoral studies have been done relating to the understanding and analysis of the NQF. Research into ABET provision has been undertaken for example, by Aitchison, Baatjes, Rule, Harley and other colleagues from University of KZN on a consistent basis; and Ismail and Cooper at UCT have recently completed their doctorates on social movement learning.

Innovations and examples of good practice

There are no comprehensive sources of examples of innovative practice, therefore these are idiosyncratic examples which were determined by local knowledge and what information was readily available and cannot be seen as comprehensive. They are indicative of rich, textured practices all over the country, which are often undertaken against a range of odds:

(i) **Reflect**⁵¹

In 2006 there were eight organisations in South Africa using the REFLECT approach to support a wide range of development and educational objectives:

“an innovative approach to adult learning and social change, conceived by Action Aid in 1993, and piloted in El Salvador, Bangladesh and Uganda in 1993-1995. By fusing the theories of Brazilian educationalist Paulo Freire with the methodologies of participatory rural appraisal (PRA), REFLECT seeks to link the engagement of people in wider processes of development and social change with the learning of literacy and other communication skills.”

Table 23: No. Participants and facilitators in Reflect programmes in South Africa in 2008

Implementing Partner & Province	FLP Family Literacy Project	SHARE SHARE Adult Ed. Centre	BCO Bushbuck-ridge CO	VRCO Vukuzenzele Reflect CO	ERCO Emakha-zeni Reflect CO	COMBOCO KwaZulu-Natal CBO * Coalition	TOTAL
Province	KZN	W. Cape	MP	Gauteng	MP	KZN	
No. Reflect circles	14	3	11	7	4	10	49
No. participants	178	39	200	108	44	109	678
Gender of participants	178 F	29 F 10 M	180 F	Mostly females	?	39 F 70 M	
Number of facilitators	11	3	10	6	3	19	52
Gender of facilitators	10 F 1 M	3 F	10 F	4 F 2 M	3 F	10 F 9 M	40 F 12 M

Source: Louise Knight, SA REFLECT Network (SARN), 2008, personal communication

* CBO - Community Based Organisation; Co – Community Organisation

REFLECT report being involved in a further seven organisations, but are unable to provide participation figures, nor can they verify if they are currently implementing Reflect as they do not have a monitoring and evaluation role with them. The organisations are: Initiative for Participatory Development in Eastern Cape; The Women’s Circle in Western Cape; the Farm Family Literacy Project in KZN; IMBALI Visual Literacy Project in Gauteng; ULWAZI Youth Reflect Cultural Organisation in Western Cape and Lutendo Community Project in Gauteng.

There were a further 350 organisations that were preparing to introduce REFLECT into their development work. One of the organisations using REFLECT is the Family Literacy Project (FLP) which uses intergenerational interventions to encourage reading in both adults and children. Participants in their literacy programme also become community volunteers and visit families passing on reading skills and information on health and early childhood development. As their programme works across generations, they are ideally suited to drawing in young people who have dropped out of school.

⁵¹ SA REFLECT Network SARN

(ii) School leavers opportunity programme (SLOT)⁵²

This programme is based in KwaZulu Natal.¹ They are currently self-funded and work mainly in one geographical area providing a one-stop help facility, using a four-phase programme:

Phase one is an eleven-day residential course focusing on basic life skills including making career choices. The second phase lasts up to one year depending on the vocational course selected by the learner. SLOT co-operates with accredited service providers and out-sources this level of training. At the end of vocational skills training, each student has to decide whether to pursue self-employment or formal employment and phase three consists of providing an intensive three-week course in Advanced Business Skills. By the end of the course, those students seeking to initiate a micro-enterprise have created their own business plan. Phase four consists of post-training opportunities and support for these students.

(iii) Wheat Trust

The Wheat Trust is a national women's fund committed to grassroots women's empowerment for community development through education and training. WHEAT awards grants to individual women and women-led community based organisations to ensure active participation of women in the development of their respective communities. One recipient describes an HIV/Aids training programme:

in the community, passing on the information to the community, there was a big change whereby there was stigma that HIV/AIDS was for certain people. So coming with this information to homes and family... made the attitude within the community change, because of this information. For example there was this witchcraft and you do not have to touch someone with HIV/AIDS. Now due to this training we gained more because we give families practical skills on how to take care of terminal ill patients.

(iv) HIV Peer Educators⁵³

A research project into 5 large South African companies with a total workforce of over 120,000 permanent and non-permanent employees revealed that the companies have approximately 1,780 active peer educators (a ratio of one peer educator to 69 employees). Approximately half of peer educators are volunteers and over 20 percent are elected by their co-workers. Training is being carried out, although there are gaps in refresher training.

Peer educators conduct a great deal of work, not all of it easily visible. The vast majority conduct formal presentations and have informal discussions with other employees, other people at work and with members of their community. Estimations of this activity provide insight into the appropriate ratio of peer educators to employees and to gauge the potential contribution to the national response to HIV/AIDS. A conservative estimate produces the potential of more than 20 million conversations about HIV/AIDS per year - assuming a national peer educator strength of 150,000.

⁵² Kathy Watters "Non-formal Education for youth" 2007

⁵³ Report on workplace HIV/AIDS peer educators in South African companies
Dr David Dickinson, Wits Business School, University of the Witwatersrand, 2006
<http://www.sarpn.org.za/documents/d0001918/index.php>

In addition to the forms in which activity is conducted, the research identifies a number of different roles carried out by peer educators. These are:

- The Influencers
- The Advisers
- The Stigma Busters
- The Normalisers
- The Sex Talkers
- The Family Builders
- The Condom Kings

Activity by workplace HIV/AIDS peer educators in the community is extensive and goes beyond formal company programmes. This diversity of activity should be acknowledged as a major contribution to the national response to HIV/AIDS.

(v) Developing Learning Activists in the workplace

The Transport Sector Education and Training Authority (TETA) has recently funded a pilot programme to train shop stewards to become learning activists in their companies. The programme is based on the premise that many medium-sized companies ignore the opportunities to develop training programmes offered by the Skills Development Levy (SDL) because of ignorance or reluctance to engage with an arduous paperwork process. It is in the interests of workers that these training programmes take place. The pilot programme has developed a five-day workshop in which shop stewards are trained in how the SDL system works and how to engage with their company in order to maximise the possibility of a training programme emerging.

(vi) Learning Cape

This has been a sustained attempt within the Western Cape Province to build synergies amongst government, civil society and business. The building of learning regions to attempt to achieve lifelong and life wide learning opportunities for citizens are important, but complex undertakings. (Walters 2007) The Learning Cape Initiative with the Western Cape Education Dept has developed an innovative approach to Family Literacy to help enhance the culture of lifelong learning.

(vii) Library Business Corners⁵⁴

Library Business Corners (LBC) started five years ago, as a small pilot project that aimed to provide a cost effective service for local businesses. With support from the City of Cape Town and provincial government, LBCs now serve entrepreneurs and small businesses through a network of 74 libraries that extends throughout the Western Cape and the project is still growing.

A special collection of books, newspapers, videos, journals, periodicals, brochures, pamphlets and press clippings are housed in a designated area or “corner” of the library in order to make business information easy to find and use.



⁵⁴ <http://www.aldsa.org/projects/index.html>

LBCs have the potential to help create jobs and alleviate poverty. South Africa has over 2 000 public libraries, which could evolve into a dense information network serving the needs of small business operators nationwide.

Increasing interest from other provinces has resulted in the LBC concept being adopted in Mpumalanga, Gauteng and the Eastern Cape. LBCs have also been established at technikons in KwaZulu-Natal, Gauteng and the Eastern Cape

(viii) Gelvenor Textiles⁵⁵

This Company currently spends approximately 14% of total employment costs on training. The South African average for the textile industry is 1,8%. This year 16 employees are on company-sponsored bursaries, ranging from basic textile studies to diplomas in textile technology, adult education, leadership training, junior management studies and business degrees. The initial training is in line with the Sector Education and Training Authority (SETA), ensuring that all employees receive a recognised national qualification in terms of the National Qualifications Framework (NQF).

Although Gelvenor has been steadily improving its training and staff development over at least two decades, perhaps the most exciting project of all is one aimed at helping the unemployed members of the surrounding community. Gelvenor opened its doors to 35 unemployed community members, offering them training in line with the NQF. With a recognisable national qualification, these people have a greatly increased chance of finding employment.

Overall, Gelvenor is particularly proud of its achievement in meeting the South African government's stringent equal opportunity and black empowerment criteria.

"We have no token appointments. Promotions are meaningful. We made a special effort to identify promising individuals from previously disadvantaged groups and develop their talents. As a result, 30% of Gelvenor's management are drawn from this pool," explains Dicky. "Through staff development, education and training, we have built a good relationship between our workers, management and the company's directors. This shows in the company's achievements and is underscored by the fact that other textile company's regularly poach staff from Gelvenor."

Gelvenor's human resource priorities do not stop there. They include employees' families as well as the broader local community. The greatest tragedy and challenge is that Gelvenor is continually losing employees to AIDS. Many of its staff are experiencing AIDS deaths at home as well and this impacts on the work performance of affected individuals. Gelvenor has its own in-house social development programme plus a full-time clinic that has two qualified nurses, assisted by a doctor who visits the plant every day to attend to special cases.

(ix) Amandla Publishers⁵⁶

This is an NGO which produces a political magazine and has a website. It argues that:

On the South African left and within the popular movement more broadly, there is a greater openness to discuss and dialogue over strategy, tactics, to engage over analysis on questions such as the nature and role of the post-apartheid state,

⁵⁵ <http://www.thedti.gov.za/article/articleview.asp?current=0&arttypeid=4&artid=467>

⁵⁶ <http://www.amandlapublishers.co.za/content/view/146/120/>

economic policy, black economic empowerment, challenges facing the workers movement and social movements, etc.

Amandla Publishers therefore seeks to build an open non-sectarian space wherein perspectives on the left can be analysed, discussed and debated. As they state, voices on the left are needed to comment on the current situation in our country, the continent and the world. Amandla Publishers contributes to the creation of a wider platform for contesting public space, discourse and debate in order to move away from `rigorous and sectarian left perspectives`. Apart from providing a voice of the left commenting on the current situation, a major objective of Amandla Publishers is to contribute to facilitate greater collaboration between broad sections of the left, activists and intellectuals from different traditions and regions of the country.

Critical Reflections on ALE in South Africa

According to Walters (2006) it is impossible to make final judgements on what has been achieved in relation to adult learning in the last 12 years. That which is clear, is that the **policy environment has changed dramatically and provides a basis to work within a lifelong learning framework**. Therefore, the challenges facing adult learning in South Africa are not necessarily in the policy arena. They relate rather to the implementation of the policies through the building of the capacities of organisations and sectors to delivery on their mandates. (see for example Ramphele 2008)

The participation rates at most levels of the system have increased significantly. This augurs well for the improvement in the culture of learning across the society. There are some indications that the skills development strategies, which have been driven through the skills levy, are making a difference to the possibilities for women and men to access training opportunities. However, the socio-economic conditions in some areas of the country work against possibilities for learning to be prioritised. The lack of public transport, levels of crime, ill-health and poverty will inevitably inhibit people's abilities to access the opportunities made available.

There has been a **dramatic decrease in the numbers of people in apprenticeships** which is causing alarm for the future of the availability of skilled workers. There are presidential initiatives to try to address the situation.

A significant advance has been the amount of funding made available through the skills development levy, and more recently for the Kha Rhi Kude Literacy Campaign. There has never been so much funding for adult learning. However, there is concern over the efficiency of the systems to deliver quality outcomes. (Parker 2007) The systems that have developed are cumbersome and there are attempts to streamline and simplify, with the changes in the NQF as one example of this.

The numbers of successful learners in the ABET system has not been as hoped. The Minister of Education has therefore set up a process to revamp the system by the establishment of a Task Group to develop a Green Paper for discussion.

The data seems to suggest that there has been a **dramatic privatisation of training through the NSDS and the Setas**. This is worrying as the new taxation from the skills levy does not seem to be strengthening the public sector provision but is rather encouraging the proliferation of private providers and consultancies, who provide

learning at market related rates which privilege the middle classes and those in formal employment.

A **host of innovative programmes** have been run through various government departments, workplaces and civil society. There is seemingly little coherence of programmes and activities across departments, and sometimes within them, which leads to an **impression of fragmentation**. It is not clear what the scale or quality of delivery is and who are the beneficiaries in terms of equity and redress imperatives.

There is need of substantial research to answer the many unanswered questions which will assist the development of `learning for sustainable livelihoods`.

There have been **significant developments in relation to the formalisation of continuing professional education**. On the face of it, then, it would appear that formalised training for employed people in formal workplaces and for professionals has potentially improved, while learning opportunities for those in informal employment or in need of basic education and training in communities have been limited and fragmented. With unemployment running at between 30% and 40% and widespread poverty this is of major concern.

There do **not appear to be any umbrella organisations, which are attempting to connect the adult educators and trainers** professionally across government, civil society, business, or across sectors such as health, literacy, or environment, since the demise of the Adult Educator and Trainers Association of South Africa (AETASA). The Adult Learners Network provides an association particularly for literacy and ABET educators.

The **adult learning activities are not usually framed within a lifelong learning** philosophy and approach, besides some possible compliance with registration of formal programmes on the NQF.

Adult and lifelong learning, which is not just symbolic but also has visionary, pedagogic and organisational implications, is a radically different way of thinking. It requires institutional structures to work in new ways across old boundaries. **There is no tradition of government departments, business or civil society working in `connected up` ways**. One way of providing a framework for lifelong learning programmes and initiatives to work across sectors and organisational silos is through the notion of the `learning region`, which is being tried within the Western Cape Province and which could be utilised as a reference point for what to do, or not to do, in other parts of the country.

Expectations of CONFINTEA VI and Future Perspectives of ALE

The conference:

- Will contribute to the global debates and provide substantial evidence of the link between children's and adult's learning in order to encourage international agencies to support adult learning;
- Will help governments to commit to adult learning in all its dimensions as a critical part of the development of lifelong learning in all countries of the world;

- Will succeed in convincing governments and international agencies to fund adult learning both in governments and civil society, including higher education institutions;
- Will popularise the social purposes of adult learning in ways which are holistic and all encompassing of women and men's lives in the majority world, as with, for example, the notion of 'learning for sustainable livelihoods' which moves away from a narrow economic view of adult learning, and will advance the need for an inter-sectoral approach to adult learning by governments, business and civil society;
- Will promote rural development to fight poverty in which the social purposes of adult learning as mentioned above will have prominence;
- Will emphasise the crucial links between informal, non-formal and formal learning as critical to the advancement of adult and lifelong learning;
- Will encourage the monitoring and evaluation of the culture of lifelong learning at national and regional levels, which emphasises the importance of understanding what is happening to adult learning for women in particular;
- Will popularise and affirm best practices in parts of the world which are inspirational for others;
- Will encourage government and civil society delegations to come from a cross section of departments or sectors in order to demonstrate the importance of intersectorality;
- Will build solidarity amongst learning activists and policy makers in order to enhance possibilities for quality adult learning in both the south and the north, at local and global levels;
- Will affirm the need for more in-depth, qualitative and quantitative research which deepens both the theoretical understandings and the practices of adult learning across all spheres.

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ⁱ The member of this committee which was established in September 2007 are Khulekani Mathe (Chair), David Diale, Matseleng Allais, Pundy Pillay, Shirley Walters, Gugu Ndebele, Ivor Baatjies, Farrel Hunter, with Kathy Watters as report writer.

ⁱⁱ Personal communication: Ms P Vinjevold (Deputy Director General FET), 17 August 2007.