

An overview of education policy 2007-2017

Martin Gustafsson

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Abstract

This paper evaluates policies governing the schooling sector over ten years against both official intentions, and the international consensus on optimal education policies as expressed by UNESCO. Poor results in international assessments helped shift South Africa's policy emphasis, in around 2007, from equity of school resourcing to the equity of learning outcomes. Learning outcomes subsequently improved, according to both the TIMSS and PIRLS international assessments. Three policy changes stand out as likely contributors to this trend: greater clarity in the curriculum documents; the beginnings of a national assessment system; and a greater availability of high-quality texts amongst pupils. South Africa's experiences with national assessments are instructive. The absence of a statement of purpose resulted in misuse of the programme, and unnecessary conflicts with teacher unions. This made it easier for unions to halt the programme. Moving forward, South Africa will need to focus on re-instituting a national assessment programme, and on working towards a better policy framework governing teacher incentives. Better guidance to teachers on how to teach reading are also needed.

1 Introduction

The decade following South Africa's first democratic elections in 1994 saw enormous policy shifts in the schooling sector, shifts which Luis Crouch has described as 'the most profound education reforms attempted anywhere in the world'¹. The reforms were indeed far-reaching, shifting a highly unequal, and race-based, school financing model to one which has been described as amongst the most equal in the world².

By 2007, however, the realisation had grown that equalising public funding was on its own not enough to reduce inequalities relating to what pupils learn. These inequalities, which remain stark, can be said to be rooted in two key factors: the enduring home background disadvantage of most black pupils, and the racially segregated and unequal teacher training system of apartheid. Crucially, whilst financing reforms emphasised the equalisation of pupil-teacher ratios and salaries, there was virtually no emphasis on getting teachers in historically advantaged schools to teach in less advantaged ones. An additional contributor to inequality is the fact that around 70% of pupils, all of whom are black, must transition, in grade 4, from learning in an indigenous African language to learning in English.

The decade 2007 to 2017 thus saw a different set of policy reforms, focussed largely on reducing inequality through improving learning outcomes in historically black schools, in which around 90% of the country's pupils are enrolled³.

The paper begins by describing, and critiquing, how educational inequality, and the best approaches to tackling this, were understood in around 2007 by stakeholders. The critique uses as a reference point the evolving evidence-based consensus on what brings about educational improvement in developing countries. The 2005 and 2014 UNESCO Education for All Global Monitoring Reports are, for the purposes of this paper, considered important sources of what this evolving consensus has been.

¹ Crouch, 2005.

² Sherman and Poirier, 2007.

³ This 90% can be broken down into 3% for historically Indian schools, 9% for historically 'coloured' schools and 78% for historically black African schools.

The paper then discusses key policy changes that occurred after 2007, but also changes which did not occur, the aim being to arrive at a high-level evaluation of how effective the government has been at bringing about change, in particular through the use of policy. In the paper, the definition of ‘policy’ is fairly broad. Strategies and rules carrying legal force are considered to be the policy core, but official guidelines, and formal speeches of politicians are also considered ‘policy’ as these do influence the system. Whilst the paper does not provide anything close to a detailed account of policy implementation, it must obviously take this matter into account when assessing whether policies have been successful or not.

The conclusion includes a discussion of priorities for the next decade of policy reform.

2 How the problem was understood in around 2007

There was no single event in 2007 that signalled a policy shift towards learning inequalities, yet a shift was occurring at the start of the decade covered by this paper. An important catalyst for the shift was the 2000 SACMEQ⁴ tests, conducted in fourteen African countries. The results of these, available initially in 2003, shocked many, though it took a few years for the shock to sink in. SACMEQ revealed how much worse the reading and mathematics of South Africa’s Grade 6 learners was relative to that in countries spending much less per pupil, such as Kenya, Mozambique and Swaziland.

The resultant policy shift was away from viewing results in the Grade 12 examinations, the so-called ‘Matric’, in isolation from what was happening in the earlier grades. Little had been known previously about the quality of education at the primary level. SACMEQ confirmed that fixing inequalities at the Grade 12 level meant fixing inequalities lower down in the system.

There was also a policy shift away from thinking that more funding equity was a guarantee of more equal learning outcomes. The financing reforms, whilst necessary, had clearly not brought about the latter. The shift was also away from viewing assessments of learning below Grade 12 managed by teachers, with minimal external quality controls, as a source of accurate information on absolute performance or inequalities between schools.

Before South Africa’s policy positions are discussed, a general framework for the discussion is presented. This framework is informed by many sources, though UNESCO’s two reports of 2005 and 2014 encapsulate them well. In many ways the framework is universal, yet it is somewhat tailored to meet the needs of a South African discussion.

We can think of two distinct levels in which policy works: the level of system-wide governance, and the level of the school. One could add a third level: pre-school. Policy on early childhood development is enormously important in determining children’s chances of success in the schooling system. However, early childhood development is not within the scope of the current paper.

System-wide governance. Given the societal nature of schooling, debates are highly influenced by popular perceptions, which are in turn influenced by knowledge and information generated by the government. In addition, government plays a crucial role in the development of the educational tools that schools use, tools which can carry high development costs. In South Africa system-wide governance is the shared responsibility of one national and nine provincial education departments. How the national and provincial levels work together is critical for the success of policy. The use of all eleven official languages as mediums of instructions in grades 1 to 3, and pressure from some quarters to promote the use of indigenous African languages in grades 4 to 12, where mostly English but

⁴ Southern and Eastern Africa Consortium for Monitoring Educational Quality.

also Afrikaans are the mediums of instruction, make materials development particularly complex in South Africa.

Policies impacting on schools directly. Three broad policy areas can be identified here.

- a. **The right to offer schooling.** Rules governing the very existence of schools, including those relating to the establishment of private schools and the rights of parents when it comes to school choice, are the foundations of any schooling system. Whilst South Africa facilitates private schooling, for instance through the public funding of less elite private schools, maintaining a large public system, even with considerable internal inequalities, is generally considered preferable to a situation, common in many developing countries, where much of the middle class makes use of private schools. In 2017, private schools catered for only 5% of all school pupils. Whilst public schools in some urban areas have somewhat rigid ‘feeder zones’, across most of the country parents are relatively free to choose between public schools.
- b. **Qualifications obtained through schools.** How the certification of learning occurs, in particular through national examinations, shapes parental and pupil expectations, and the practices of schools, in many ways. Closely linked to national qualifications is of course the national curriculum. South Africa, unlike all her neighbouring countries, has no national qualification below the end of the secondary level. The Grade 12 ‘Matric’, obtained by just over half of youths in recent years, has a history of over a century and features prominently in the national debates. Though the system includes technical and vocational subjects, these are only offered by around 16% of the schools participating in the Matric, meaning that for most schools the Matric assumes a largely academic character⁵. The less academic subjects are disproportionately concentrated in schools that are historically white.
- c. **Resourcing and accountability policies.** This is a large and complex policy area. Schools are given public resources, and through various systems they must account for the effective use of these resources. Policies can be centralist, for instance where the authorities decide on the exact resourcing package of each school, and control closely how resources are used. Alternatively, policies can be decentralist, involving the transfer of funding to schools, coupled to accountability systems focussing on learning outcomes, rather than processes. Advocates of the latter tend to emphasise the importance of accountability to parents as a means of promoting effective resource utilisation. South Africa, like many countries, features a complex mix of centralist and decentralist policies. While each school has considerable say in who works there, the province is the official employer, and the national level negotiates national salary scales with the country’s powerful teacher unions. The success of the entire human resourcing system is dependent on policies governing the following issues: recruitment into the teaching profession; the quality of initial teacher training; the kind of in-service training that takes place; and the ability to retain teachers, in particular good ones. Pro-poor resourcing is widely recognised as necessary to offset, at least partly, home background disadvantage. Such resourcing should involve actions by the state to increase access to good teachers amongst pupils in poorer communities. What complicates the notion of pro-poor funding in South Africa is the fact that public schools in more advantaged communities, serving around 30% of all public school pupils, are permitted to charge fees, though they must fully or partially exempt pupils from low income households.

⁵ The 16% of schools examine at least one of following ‘Matric’ subjects: Engineering graphics and design, Civil technology, Electrical technology, Mechanical technology. These four subjects often define which schools are considered ‘technical schools’.

So what was the thinking in South Africa, around 2007, on what aspects to change in the web of policies outlined above in order to reduce educational inequalities?

The annual budget speeches to Parliament of the national Minister of Education in the years 2006 to 2008 provide useful insights. They include an emphasis on stepping up existing initiatives, such as support to teachers by district officials. But they also include commitments to school and teacher accountability, through programmes which would be new, and could require careful negotiation with unions. For instance, the 2006 speech refers to assessments of individual teachers which could lead to cash awards. The 2008 speech indicates that pupil performance would be taken into account within the teacher remuneration system. It also refers to the establishment of a new national 'inspectorate' of schools, a provocative term given the unpleasant memories of many black teachers of the school inspectors of the apartheid era, inspectors whose role was partly to maintain the political status quo.

Strong words against the mediocrity of many teachers and officials, and a statement that inadequate resources were no longer an excuse for poor schooling, all in the 2007 speech, are indicative of the policy shift that was under way away from a strong focus on school funding, towards a greater emphasis on efficiency.

Less controversial from a teacher union perspective would have been the Minister's commitment to a more consistent and generous set of policies governing teacher recruitment, professional development and promotions. The 2006 speech included a commitment to counteracting teacher shortages in remote areas through an incentive.

The 2007 speech emphasised the importance of strengthening the teaching of reading. A new programme referred to as the Early Grade Reading Assessment was announced. The 2006 speech implicitly admitted that measures of performance for all primary schools were a gap in the system, by declaring that geographical proximity to poorly performing secondary schools would be used to identify primary schools requiring an intervention.

Resolutions passed in 2008 by the South African Democratic Teachers Union (SADTU) suggest that, at least on paper, the consensus between unions and government was strong. Though SADTU, accounting for 71% of all union membership amongst teachers, is officially an ally of the ruling African National Congress (ANC) party, of the various teacher unions it has also been the most vocal critic of the government. Yet the 2008 resolutions accept that poor quality schooling is a problem, and call for errant teachers to be disciplined. Key complaints directed at the government sound reasonable: curriculum change should be linked to a long-term strategy and programmes to evaluate teachers should be sensitive to the context in which teachers teach⁶.

The 2008 policy on education of the official opposition, the Democratic Alliance (DA), did not differ greatly from the government's policy positions. One difference is that it proposed linking pay increases for teachers to subject knowledge tests that teachers would write. A key distinguishing feature of the DA's policy was a proposal to provide vouchers for 350,000 pupils from low income households to attend better schools⁷.

A 2009 report on education by the Centre for Development and Enterprise, an influential policy think tank funded largely by business, echoes many of the concerns of government at the time and proposes no 'magic bullets' to resolve the country's educational inequalities. What it does emphasise is the importance of practical policies, learning from the experiences

⁶ South African Democratic Teachers Union, 2008.

⁷ Democratic Alliance, 2008.

of other countries, and paying attention to negotiating policies with, in particular, the teacher unions⁸.

To conclude, there appeared to be a remarkable degree of policy consensus in the schooling sphere. Moreover, several of government's commitments seemed promising, such as streamlining policies on human resources, and strengthening reading acquisition in schools.

However, some gaps stand out. In particular, the fact that at the time over half of youths emerging from the schooling system would not have acquired a national qualification probably warranted better attention. (Only around 2% of youths acquire a national qualification from an institution other than a school, without first obtaining the 'Matric' from a school⁹.) The Minister's 2008 speech emphasised getting all youths to complete Grade 12 successfully. However, given that completion of twelve years of education in South Africa was and remains at a level that is fairly typical for a middle income country, and given that progress against this indicator tends to be gradual, the obvious question is whether a second national school qualification, at an earlier grade, was needed to improve the chances that all pupils would receive at least some qualification. In fact, in the 1990s the ANC advocated a Grade 9 qualification in its policy documents¹⁰.

The literature on incentives for teachers routinely warns about the complications of attempting performance incentives for individual teachers. Such incentives tend not to recognise the fact that educational improvement in schools is the result of a team of teachers working together, meaning financial incentives directed at whole schools are more workable. One 'red flag' in government's positions at the time, at least as represented by the Minister's speeches, seems to be insufficient sensitivity to the complexities of designing effective teacher incentives. This, in turn, suggests that lessons from other countries had not been internalised¹¹. A further concern would be insufficient consistency across the three ministerial speeches examined. For instance, the important matter of incentives for teachers in remote schools, referred to in the 2006 speech, is not followed through in the next two speeches. In fact, insufficient follow-through will be shown to be a considerable problem in South Africa's education policymaking processes.

3 Policy changes in the 2007 to 2017 period

Nine of many possible policy topics are discussed in this section. The nine, indicated by bold text, were selected on the basis of their strategic importance, but also for their ability to illustrate generic policymaking challenges, such as achieving consistency across and within policies, and allowing policies to be informed by empirical evidence and cost data. Most of the policy topics featured prominently in the news and debates, but a couple did not. The latter were selected because they represent areas of policy where arguably there should have been more debate and perhaps even policy change.

The nine policy topics are as follows: (1) curriculum reform; (2) national workbooks; (3) Grade 9 qualification; (4) schools-based 'reception year'; (5) e-education; (6) rules governing teachers; (7) national assessments and school principal accountability; (8) charter schools; and (9) national planning systems. The common thread running through these topics is that they had at least the potential to bring about change, and specifically reductions in inequality.

The first policy area, **curriculum reform**, is one of three which are believed to explain to a large extent the fairly steep performance improvements South Africa displayed in the

⁸ Centre for Development and Enterprise, 2009.

⁹ South Africa: Department of Basic Education (2016a: 81).

¹⁰ South Africa: Department of Education, 1995.

¹¹ UNESCO, 2015: 262.

international testing programmes. Specifically, Grade 9 TIMSS¹² results in mathematics improved by one standard deviation between 2002 and 2015¹³. This was largely driven by improvements in schools serving more disadvantaged communities, meaning levels of inequality were reduced¹⁴. PIRLS¹⁵ Grade 4 reading results improved by around half a standard deviation between 2006 and 2011, or by more than a year's worth of learning, though between 2011 and 2016 no further improvement was found¹⁶. In the Department of Basic Education's (DBE) list of likely factors contributing to this improvement, three stand out: curriculum reform, a new national assessment programme, and better access to books in classrooms¹⁷. Curriculum reform is discussed here, and the other two are dealt with further down.

Curriculum reform does in many ways stand out as one of the policy success stories of the 2007 to 2017 decade. In 2008, as part of the Foundations for Learning programme, the Department of Education¹⁸ began producing guides aimed at grades 1 to 6 teachers in order to bring about greater clarity on what should be done in the classroom. This work culminated in a series of guides known as the Curriculum and Assessment Policy Statement, or CAPS, which were introduced between 2011 and 2014 for all grades. This effectively brought to an end a divisive and unpopular curriculum known as 'outcomes based education', or OBE, which was increasingly viewed as overly theoretical and impractical. OBE arguably exacerbated inequalities by expecting teachers to develop their own materials, which was only really feasible in historically advantaged schools. The rise and fall of OBE, or particular forms of it, across many countries, is a topic warranting a separate paper.

Though generally welcomed by schools, the CAPS still appears to provide insufficient guidance on the crucial matter of teaching children to read. The DBE's 2017 annual plan envisages improving the teaching of reading through the Early Grade Reading Assessment (EGRA) tools and a set of reading norms. This sounds similar to priorities put forward a decade earlier, around 2007. Analysts have argued that insufficient follow-through and a lack of policy depth have hampered progress in this area¹⁹. To illustrate, the DBE's plans are not clear on the fact that reading norms, meaning words per minute to be read by pupils in different grades, have not been developed for most of the languages, or on how this policy development work will proceed. Strategies on promoting reading, whilst well-intended, have mostly lacked solid monitoring plans, making it easier for initiatives to be forgotten, and then recycled. But there has been progress. The DBE's Early Grade Reading Study, involving a large range of local and international stakeholders, has clearly deepened the sector's understanding of what tools and practices in the classroom lead to better reading. A 2017 report details the findings of the study²⁰.

The DBE has, since 2016, committed itself to the introduction of new vocational and technical streams within the secondary school curriculum, as a way of catering for pupils who typically drop out. Whilst the 'three-stream model' appears to represent a positive shift, the absence of detailed policy documents has been criticised. However, there are further gaps

¹² Trends in International Mathematics and Science Study.

¹³ Reddy *et al*, 2016. Note that 'TIMSS 2003' was in fact conducted in 2002 in South Africa.

¹⁴ Van der Berg and Gustafsson, 2017: 7.

¹⁵ Progress in International Reading Literacy Study.

¹⁶ See Howie *et al* (2008: 19) and Howie *et al* (2017). Note that the 2011 Grade 4 average national score appearing in the 2017 report is a rescaled average that is comparable to the earlier 2006 *Grade 5* national average.

¹⁷ South Africa: Department of Basic Education, 2015: 10-11. See also Australian Council for Educational Research (2013: 12).

¹⁸ In 2009 the Department of Education was split into the Department of Basic Education and the Department of Higher Education and Training.

¹⁹ Van der Berg *et al* (2016: 51).

²⁰ South Africa: Department of Basic Education, 2017.

which are hardly mentioned in the policy debates. Though new policies and strategies relating to technical schools have largely been internally consistent²¹, how the existing system of technical schools and subjects could be expanded to include more disadvantaged pupils has received scant attention. Such expansion should involve some kind of collaboration between technical schools and selected schools in historically disadvantaged areas to build the capacity of the latter to offer technical subjects. In short, the tackling of inequalities by changing patterns of access within the existing policy framework, as opposed introducing new curriculum policy, seems an under-explored area.

The next topic is **national workbooks**. An ambitious programme involving the distribution of high-quality and standard workbooks, meaning textbooks in which pupils would write, and which would complement traditional textbooks, was started in 2011 to further the goal of clarifying what teachers should do in the post-OBE classroom. The national workbooks, known formally as the Rainbow Workbooks, are believed to be a second likely factor contributing towards improvements in learning (the first being curriculum reform). As in the case of curriculum reform, better access to texts began earlier, with the Foundations for Learning programme, but the start of the full-scale national workbooks programme in 2011 took this intervention to a new level. The focus of the programme was initially grades 1 to 6, but this was expanded to R to 9. To provide a sense of the magnitude of the development work that underpinned the workbooks programme, in 2012 each Grade 6 pupil received two mathematics books with an overall total of 300 pages, each page consisting of colour illustrations and text, with some including space for the pupil's own writing. There were a further 300 such pages for home language, and a further 300 for first additional language (the two language levels had different materials). Versions in all eleven official languages were produced, making the programme one of government's most important contributions to date with respect to the development and promotion of the nine indigenous African languages. The development work was done within the DBE, and electronic versions of the books are available online.

The workbooks programme was on the whole well received and prompted an uncharacteristic compliment by the leader of the official opposition party to the Minister of basic education²². An external evaluation of the design and use of the workbooks by the Australian Council for Educational Research, ACER, was mostly positive. It was found that around 80% of schools used the workbooks – workbook use was not made mandatory by the national authorities, though some provinces and districts insisted strongly that they be used. Because pupils became the permanent owners of their books, over the years they would accumulate in households. The ACER evaluation found that this facilitated learning amongst other household members. One pupil's response that 'I do not understand the maths teacher but I understand the workbook'²³, is telling. In some ways, the programme constituted a way of circumventing poor teacher quality. The programme was deemed sufficiently important to result in the addition of questions on the workbooks in Statistics South Africa's annual General Household Survey.

There were problems with the workbooks programme, relating mainly to the logistics of delivering, in the right language combinations, almost 40 million workbooks a year to schools. Though the workbooks were in themselves policy, in the sense that they constituted a standard recipe for getting something right, ACER suggested that actual policy on what the purpose of the workbooks was, and the communication of this policy to schools and parents, was needed.

²¹ See for instance 2012 reports to Parliament at <https://pmg.org.za/committee-meeting/14351> (accessed January 2018), and the DBE's Circular S7 of 2015.

²² Zille, 2013. The programme also receives mention in UNESCO (2015: 285).

²³ Australian Council for Educational Research, 2013: 18.

What were the critical success factors in this programme? Good leadership of the programme stands out. Moreover, the fact that just under half of the funding for the programme during the initial years came from foreign donors could have strengthened accountability and quality control.

Other initiatives also contributed towards better access to books in schools. In particular, increases in the non-personnel financial allocations to schools allowed schools to purchase more textbooks. Perhaps the most striking indicator of the impact of this is that in the TIMSS data, the percentage of lower secondary mathematics teachers reporting that they used a textbook as a basis for planning their teaching increased from 30% in 2002 to 71% in 2011.

Apart from the revision of the Grade 12 examinations in 2008 to align them to the new post-apartheid curriculum, there were no major changes in the area of school qualifications. The new CAPS guides placed considerable emphasis on examinations in every grade from Grade 4, but did not require national examinations, or any new national qualification. An important 2014 report by a ministerial committee²⁴ looking into the Grade 12 qualification recommended that a **Grade 9 qualification** be introduced, but this appears not to have been taken up by the DBE, or other stakeholders, such as the committee of Parliament dealing with basic education. The problem of weak follow-through appears to be a problem not just in the national and provincial departments, but also in the broader policymaking system, which includes Parliament and various forums that stakeholders, from unions to university academics to civil society activist groups, participate in.

Interest in a qualification below Grade 12 is weakened by a strong belief that twelve years of education for all youths is an ideal which can be realised relatively soon. This seems to reflect an inadequate understanding of educational development in other countries. Improving grade attainment tends to be a slow process, largely because it takes time to improve the quality of teaching, something which is necessary to advance pupil ‘survival’ in the system.

A **schools-based ‘reception year’**, or Grade R, for children aged five at the start of the school year had been formally introduced in the national curriculum in 2002. Then, the percentage of the target population attending Grade R in a school was around 25%. This figure increased sharply to around 70% in 2014 (by which time if one counted Grade R learners in centres outside schools, the figure stood at around 95%)²⁵. Growth in Grade R was probably the most visible change occurring in primary schools over this period. This development was possible largely because of a tacit agreement between government and the unions that a low-cost model of employment would be used. Instead of using typical national salary scales, determined through a central bargaining process, schools would pay Grade R ‘practitioners’, essentially teachers, at rates decided between the school and the employee, using funds transferred to the school. Over time, and in some provinces more than in others, unions succeeded in getting province-wide minimum wages declared, but even these were around one-fifth of what a teacher in grades 1 to 12 was earning. This gap is huge, even if one considers the lower qualifications requirements for Grade R teachers. Grade R expansion could occur because there was sufficient trust between government and the unions, at least in this policy area. In particular, it was clear that the Grade R arrangement would not be replicated in other grades.

However, the Grade R policies lacked detail on how the quality of the expanded service would be assured and monitored. A 2014 report²⁶ evaluating the impact of Grade R, produced by Presidency’s Department of Planning, Monitoring and Evaluation (DPME), made use of innovative data techniques to conclude that between 2005 and 2011 the introduction of Grade

²⁴ South Africa: Department of Basic Education, 2014.

²⁵ South Africa: Department of Basic Education, 2016a: 11, 58.

²⁶ South Africa: Department of Planning, Monitoring and Evaluation, 2014.

R made no difference to test results in Grade 1 and above in the case of the poorest three quintiles of schools, and a small positive difference in more advantaged schools. There is unfortunately no information on quality trends beyond 2011, a period that has seen a stronger focus on delivering Grade R materials to schools.

Progress with respect to policy on **e-education** has been disappointing. This policy topic is included here largely because in South Africa, as elsewhere, there is great public interest in increasing the use of modern information and communication technologies, ICTs, in schools. This has prompted many local initiatives. Data on ICTs in schools are scarce, but TIMSS data indicate that the percentage of Grade 9 pupils with access to computers in schools increased from 28% to 43% between 2002 and 2015. A problem with this trend is that the correlation between having ICTs and the school community's socio-economic status is high, meaning poorer communities have been left behind. South Africa's 2015 figure of 43% is in fact considerably lower than the comparable figures for other developing countries, including Ghana, Botswana and Indonesia (these three all display figures of over 70%). Improving access to ICTs amongst poorer communities, whilst at the same time dealing with the risk that weak strategies can result in no value being added by ICTs²⁷, requires very careful planning by the national government. Reports on the e-education situation in South Africa emphasise the need for better national policy to guide both public and private investments²⁸. What is perhaps not made clear enough, in the area of e-education but also other education areas, is what is meant by an effective 'strategy'. Virtually all advisors on strategy will emphasise the need to have a vision and to think broadly. In this respect, South African e-education strategists have been relatively successful. However, strategy also requires a good diagnosis of the point of departure, an understanding of the resource constraints, and an ability to prioritise, which in some cases means making tough choices. It appears that these specific aspects of planning have not received enough attention.

The focus now moves from curriculum-related matters to the politically sensitive area of the **rules governing teachers**. In 2008, what appeared to be the most radical changes to these rules since the removal, in the 1990s, of the race-based salary scales, were promulgated. The Occupation Specific Dispensation²⁹ for educators involved paying larger annual increases to teachers classified in any year as 'good' or 'excellent' in the performance management system, known as the IQMS³⁰, which had existed since 2003. Previously, one's IQMS classification had made virtually no difference to one's annual experience-linked increase. The additional costs of the new system were justified on the basis that this would improve learning outcomes, particularly in historically disadvantaged schools. However, there were serious gaps in the policy signed by the employer and unions, gaps which would be exploited by unions when they made an about-turn in 2009 and successfully cancelled the policy. How the financially lucrative IQMS classifications would be rationed across schools to prevent over-expenditure, or how one would deal with the increased need for anti-corruption controls, now that classifications were being attached to money, were not made clear. The latter policy challenge is particularly difficult to resolve, given inherent difficulties in individual performance-linked incentives for teachers.

In a dramatic turn of events, in 2009 SADTU ensured that the funding for the policy was retained, whilst removing the performance-linked differentiation across teachers, essentially meaning the money would be spread across all teachers. This was possible partly because the ruling party wanted to maximise votes from teachers in the 2009 elections. However, policy design weaknesses played a role too.

²⁷ UNESCO, 2015: 35, 293.

²⁸ Meyer and Gent, 2016.

²⁹ Education Labour Relations Council Resolution 1 of 2008.

³⁰ Integrated Quality Management System.

A general gap in the policy discourse around teacher pay is that the crucial trade-off between teacher pay and the pupil-teacher ratio barely features. This is a trade-off that teachers should have a direct interest in. In comparison to other middle income countries, South Africa's teacher pay is relatively high, whilst class sizes are also high. This peculiarity suggests the former should be carefully controlled to provide relief with regard to the latter. Between 2007 and 2017, what are known as the 'cost-of-living adjustments' for teachers have exceeded official inflation, meaning that in real terms teacher pay improved by 27% over the period. This excludes experience-linked increments, at 1% a year for all teachers. These increases, in combination with weak economic growth, would have made South Africa's relationship between pay and pupil-teacher ratios increasingly peculiar in the international context. What has been missing in the wage negotiations is sufficient attention to the impact on the size of the teacher workforce, and class sizes, of above-inflation salary increments.

Crafting better pay and incentive agreements is in part dependent on what happens in the larger public servant policy arena. Teacher pay increases have roughly been in line with those for other public servants. However, with 37% of all national and provincial personnel spending going towards the schooling sector, the sector is well-placed to influence the overall system.

The schooling sector could, for instance, lead the way in producing a holistic strategy on how incentives, financial *and non-financial*, encourage good service delivery. This would essentially be the 'align actors' leg of the three-pronged approach for schooling advocated by the 2018 *World Development Report* (the other two being 'assess learning' and 'act on evidence')³¹. Gradually, better understandings of how incentives work in schooling are being reached. For instance, between the 2011 draft version of the National Development Plan and the final plan released in 2012 there was an important shift in emphasis from performance-linked pay increases paid to individual teachers, to financial incentives paid to schools as a whole in recognition of improvements. The latter, whilst also not easy to implement, has enjoyed greater success in developing countries.

Perhaps the most important financial incentive for teachers, and one which has existed for decades, is promotion into a schools-based 'head of department' (HoD) position. The ratio of ordinary teachers to HoDs is 6:1, being promoted to an HoD comes with, on average, a 20% pay increase, and 92% of teachers are in schools large enough for HoD positions to exist. Policy discussions of teacher incentives, such as those on the 2008 reforms, have tended to be silent on the matter of HoDs, which is surprising. A handbook by UNESCO's International Institute for Educational Planning warns that the 'need for system maintenance can be overlooked in the flood of enthusiasm that often accompanies innovation'³². Insufficient attention to entrenched aspects of the system can have serious consequences. A 2016 report³³, commissioned by the Minister following a number of alarming news reports, found that promotions into, for instance, HoD and principal positions were often corrupt and nepotistic, with a couple of tragic murders in KwaZulu-Natal having been a consequence of this. Had ongoing monitoring of the promotions process been better, this could have been avoided. It is difficult to gauge from the report how widespread the corruption is, a matter which is important for designing a response. It seems the outcome of the report will be the transfer of some personnel hiring powers, across all schools, from parents to the provincial education department. This would understandably be opposed by schools running clean promotions processes.

Turning to other areas in the teacher policy space, two national frameworks for teacher development were published, one in 2006 and another in 2011. The two prioritise similar

³¹ World Bank, 2018.

³² Inbar, 1996: 42.

³³ South Africa: Department of Basic Education, 2016b.

things. Both seem lacking when it comes to considering benefits relative to the financial costs of various policy options, and in taking into account the incentives that drive (or demotivate) people. In this regard policymakers could have been more ambitious. It has been argued that they could have been *less* ambitious with regard to the development, begun in 2007, of a national database of each teacher's professional development activities. The viability of the plans for the database, a tool which few if any developing countries have attempted to build, was questioned in a 2012 report³⁴.

A policy that might have promoted greater equity by bringing outstanding teachers to disadvantaged pupils was a 2007 policy on financial incentives encouraging teachers to move to remote and 'difficult' schools. UNESCO promotes this as a vital equity-enhancing strategy³⁵. In South Africa, policies that take disadvantaged pupils to good teachers have received much attention, the fee exemptions policy being one example, but the converse, taking good teachers to where disadvantaged pupils school, has received little attention. The 2007 policy led to hardly any change, however, perhaps because it lacked a convincing equity argument, and definitely because how it would be allocated the necessary budget was not made clear.

The Funza Lushaka bursary scheme to address the under-supply of new teachers is an example of a policy relating to teachers which has made a positive difference³⁶. The scheme, introduced in 2007, has worked relatively well because the problem being addressed, the under-supply of teachers, was understood and well researched, and because the various stakeholders, including the DBE, the Department of Higher Education and Training, and the National Student Financial Aid Scheme, worked well together. However, aspects of the scheme have not worked well. In particular, the aim of using the programme to oblige young teachers to work in disadvantaged schools has mostly not been realised, largely due to weak management and information systems. To a large degree, recipients of the bursary have themselves determined where they would work.

As politically sensitive as rules governing teachers, have been standardised national assessments, specifically the Annual National Assessments (ANA) programme, which ran from 2011 to 2014, reaching an unexpected and dramatic end, some would say pause, in 2015. This programme is discussed under the rubric **national assessments and school principal accountability**, given the inter-relatedness of these two issues. The DBE began encouraging the use of standardised tests in 2008, within the Foundations for Learning programme. From 2011, ANA was run across all schools offering grades 1 to 6 (and from 2012, Grade 9). Tests were delivered in packages to schools, which were to be opened on national test days. Teachers at the school marked the tests, subject to limited external quality controls. Pupils' raw marks, which were fed into a national database, were used to generate highly publicised reports containing aggregates at the national, provincial and district levels, but not the school level. ANA was supported by some for sending the right signals across the system about the centrality of basic competencies. It is these signals that are believed to have contributed to the improvements in the international tests, which also test basic competencies. But ANA was also heavily criticised. In 2015, SADTU led a successful campaign to stop ANA. Unlike in 2009, when SADTU's opposition to performance-linked pay was not widely supported, in 2015 many academics and, through an unprecedented statement³⁷, even the opposition Democratic Alliance, supported SADTU. As a result, the 2015 run of ANA was aborted in the last minute. In 2016 and 2017, the DBE has struggled to re-develop the national assessment programme in a manner than would be acceptable to SADTU.

³⁴ South African Council for Educators, 2012.

³⁵ UNESCO, 2014: 249.

³⁶ South Africa: Department of Planning, Monitoring and Evaluation, 2016.

³⁷ <https://www.da.org.za/2014/10/sadtu-right-annual-national-assessments-arent-working> (accessed January 2018).

Why did South Africa not succeed in sustaining an intervention which UNESCO³⁸ and others have said is so central for advancing quality education for the disadvantaged? Why did South Africa not succeed in replicating, say, Brazil's national assessment, which is said to have impacted positively on equalising learning outcomes³⁹? A 2016 DBE report⁴⁰ acknowledges that the absence of a policy explaining clearly the purpose of ANA led to confusion and that there were design flaws in the programme: too many grades were covered and the comparability of results across years was not given the attention it deserved. The importance of policy clarity and the coherence of programme design in an area as contested as national assessments cannot be over-emphasised. It should have been made clear that ANA's main purpose was to provide a measure of each primary school's average learning outcomes, thus plugging an important gap in the South African schooling system. How these measures would be used, fairly and realistically, to hold, above all, school principals accountable should also have been explained. It should have been explained, for instance, that holding individual teachers accountable was *not* a purpose of ANA.

A 2016 policy on the 'standards for school principals', whilst more holistic than earlier policies in this area, lacked clarity on 'tough' issues such as the definitions of persistent school under-performance, and the consequences of this for principals. It moreover skirts the related and crucial issue of whether South Africa's system of school poverty quintiles is an adequate basis for determining the socio-economic status of the school community, and fails to emphasise that judgements around a school principal's effectiveness need to be made relative to the type of school community served by the school.

Policies on the legal status of schools, or on the right to offer schooling, have not changed fundamentally since the South African Schools Act was promulgated in 1996. Nor did change in this area feature prominently in the policy debates. Yet the potential for change offered by this policy area according to stakeholders such as Centre for Development and Enterprise (CDE)⁴¹ seemed to make it important enough to include amongst the nine policy topics. Specifically, the CDE has promoted the creation of a new category of schools, akin to the **charter schools** of the United States, essentially semi-private schools contracted by the state to offer schooling in less advantaged communities.

Around 2008, the Department of Education was in fact considering the option of a new category of schools, as a means of creating more choice for parents in poorer communities⁴². This did not lead to new national policy, but in 2016 the province of Western Cape began piloting a few 'collaboration schools', public schools partly managed by external 'operating partners' paid to improve learning outcomes. Predictably, given the tendency of teacher unions worldwide to view these types of programmes with suspicion, the Western Cape authorities have faced stiff resistance. Given the sensitivities around such changes, realigning the incentives for schools and teachers within the existing framework should probably be the first priority. In public schools, many options remain largely unexplored (as seen in the foregoing discussions). Policies on private schools, or 'independent schools' as they are known in South Africa, could become more oriented towards quality schooling for poorer communities. These schools are increasingly catering for black children – by around 2013, just over 60% of pupils were black African whilst 20% were white⁴³. At the secondary level, public subsidies for independent schools are conditional on the fulfilment of minimum academic outputs in the Grade 12 examinations. Were standardised tests to be re-introduced at the primary level, the same funding criteria could be introduced here.

³⁸ UNESCO (2015: 90) and UNESCO (2005: 120).

³⁹ Bruns *et al*, 2012: 7.

⁴⁰ South Africa: Department of Basic Education, 2016c.

⁴¹ Schirmer *et al*, 2013.

⁴² Historic Schools Restoration Project, 2010.

⁴³ See Centre for Development and Enterprise (2015), also Van der Berg *et al* (2017).

Turning to **national planning systems**, the first term of the Zuma government, from 2009 to 2014, was in fact a period of remarkable innovation in this area. The benefits of these innovations are likely to be felt for a long time, and they undoubtedly facilitate better education policymaking. A National Planning Commission was established, in line with good practice in other countries, and South Africa's first long-term national development plan was released by the Commission in 2012. The new Department of Planning, Monitoring and Evaluation had by the end of 2017 published on its website five major evaluations relating to the basic education sector on the quality of textbooks, Grade R in schools, support for Grade 12 examination candidates, Funza Lushaka, and the national school nutrition programme.

In order to widen the pool of researchers with access to government microdata, the DBE began making school-level enrolment and examinations data accessible through the University of Cape Town's DataFirst facility in 2014. Strengthening data analysis skills, inside and outside government, to facilitate evidence-based policymaking, is clearly needed. In general, more black education researchers are needed. The surnames of the authors of the most prominent education research published in the last decade confirm that black Africans, who constitute 81% of the population, are still grossly under-represented. This matters a lot in a country where policy debates are easily polarised along racial lines.

To conclude this section, one sometimes hears in South African education policy circles that national policies are essentially sound, and that tackling poor learning outcomes is largely a question of implementing existing policies properly, particularly in the provinces. Implementation and enforcement are indeed large and important challenges. However, this section has tried to demonstrate that there are significant gaps in the policy landscape. There is policy which ought to exist but does not. There are flaws in existing policies, and cases where such flaws hampered implementation, often because they raised the risk of conflict between government and the unions. Ongoing policy maintenance and innovation is necessary in South Africa. However, even the best imaginable policies are no guarantee that the schooling system will work well. To achieve this, good policies must be combined with sufficient public consensus around the policies, effective management, and well-functioning public accountability bodies, such as Parliament.

4 Conclusion and the road ahead

The last decade of education policy reform in South Africa has been more typical for a developing country, relative to her previous decade, where the focus had to fall strongly on undoing the unequal funding legacy of apartheid. South Africa and other developing countries, in particular those with strong teacher unions, stand to learn a lot from the 2007 to 2017 decade covered in this paper.

The paper has paid attention to what can be achieved when policymaking is rigorous in the sense that it is informed by the national and international evidence, when it focusses on the desired policy outcomes, and when it attempts as far as possible to achieve alignment across policies within the sector. But the risks inherent in fragmented policymaking, where fragmentation is often a manifestation of silo effects in the bureaucracy, are also illustrated, as are the risks associated with an over-enthusiasm to innovate, when adapting existing systems should perhaps have been the first priority. Moreover, the dangers of promulgating policies which fail to include information on their costs, and sources of funding, have been discussed.

Around 2007, a certain sense of despair had crept in as the realisation dawned that tackling the legacy of apartheid education inequalities required far more than simply dismantling the apartheid school funding model, and as it became clear how little South African children were learning, even relative to children in economically less developed African countries. But there were policymakers who set about refocussing the system so that it paid more attention to the effectiveness of classroom practices. These efforts paid off. Learning outcomes improved,

according to the international testing programmes, and the improvements were large by international standards, though off a very low base.

How were the improvements achieved? In answering this question, it is important to bear in mind that not all educational change is the result of policy change. The fact that the education levels of adults in the households of pupils were increasing would have played a role⁴⁴. However, it is extremely likely that certain policy changes also played a role. The most impressive of these in terms of actual policy production must be the introduction of the CAPS curriculum guides, which brought to an end a period during which schools had struggled with the overly open-ended and largely impractical ‘outcomes based education’ curriculum. The CAPS guides, whose production clearly involved bringing together a large number of experts, attest to the ability of the national authorities to manage complex policymaking processes.

Two other interventions probably also played an important role. One was an ambitious programme aimed at providing every pupil in each year with a voluminous set of full-colour national workbooks. It was not the only initiative aimed at improving access to books, but it was the most visible one. The other intervention was standardised testing aimed at providing a more objective picture of how well schools were performing. However, here good intentions, combined with much operational effort, proved not to be enough, and unions were able to halt the intervention. This was in part due to a missing piece in the puzzle: a clear policy on the exact purpose of the new assessment system. This gap made the Annual National Assessments programme vulnerable, and created room for confusion.

There is now enough evidence to conclude that South Africa’s educational improvement trajectory has slowed down in recent years. TIMSS grade 9 improvements were around twice as steep between 2002 and 2011, as between 2011 and 2015. Whilst PIRLS pointed to improvements in reading at the primary level between 2006 and 2011, the 2011 to 2016 trend has been flat. The causes for this need to be understood broadly. The percentage of South Africans living in poverty, following a long decline up to 2011, has risen in recent years⁴⁵. This is a terrible context in which to be delivering education services, and one which makes further improvements especially difficult. One can only hope that these socio-economic setbacks are a temporary blip in the country’s development.

In one important respect, the context for good education policymaking was better in 2017 than it was in 2007. In 2007 there was far less in terms of research, data and over-arching policies to turn to than ten years later. In 2017, policymakers and education researchers had a National Development Plan and, aligned to this, a long-term basic education sector plan, to frame their work. They had a sizeable volume of research and evaluation reports, and more publicly available data. A valuable 2017 addition to the stock of knowledge was a multi-sector report, funded by Parliament, evaluating existing legislation, specifically its ability to tackle inequality⁴⁶. That report drew from several background reports, all available on the web. If this leads to a more evidence-based policy discourse amongst legislators, that would be an important step forward.

So what should policymakers focus on in the next decade or so? What mistakes from the past should be avoided? Of the nine policy topics covered in the previous section, two stand out as both important and as requiring particularly complex policy work. One is policies governing teachers. The other is national assessments and school principal accountability (which has been considered one topic, given the inter-relatedness of the two matters).

⁴⁴ Van der Berg and Gustafsson, 2017: 14.

⁴⁵ Statistics South Africa, 2017.

⁴⁶ South Africa: Parliament, 2017.

Of the two, policy on teachers lags most behind, despite the fact that teachers account for the bulk of spending on schools. It seems South Africa is only beginning to understand the nature of teacher incentives, trade-offs between teacher pay and pupil-teacher ratios, and the need for a holistic policy framework for teachers. The ‘one step forward two steps back’ phenomenon, whereby apparently groundbreaking policy reforms, with an insufficient conceptual and analytical basis, are followed by a reversal and a breakdown of trust between the employer and unions, needs to be avoided. There is no substitute for careful policy analysis, most of which should be undertaken, by all parties, prior to and outside of the negotiations process. Perhaps an initial undertaking should be a good stocktaking of current conditions and incentives surrounding teachers. The current policy framework is a system which, for all its flaws, works in a basic sense.

Much more work has been done in the area of national assessments and principal accountability, though the link between these two components needs to become clearer. Parliament’s review of existing legislation alludes to the technical complexities⁴⁷: in order to produce school-level measures of performance which are comparable over time, both a universal system of testing covering all schools is necessary, and a sample-based system using secure anchor items, essentially questions common across years which are not leaked to the public. Carefully designed overlaps between the universal and sample-based systems are needed, as well as the statistical adjustment of marks. These technicalities have become standard fare in many countries, including several developing countries. Parliament’s review also emphasises the importance of what has been underlined above: a clear policy on the purpose of national assessments. By emphasising within such a policy that the focus is largely on the accountability of schools, and their principals, and not the accountability of individual teachers, union concerns can largely be put to rest.

In the area of curriculum, where much has been achieved over the last ten years, one important gap remains: proper guidance to teachers on how to teach reading in the early grades. This is an area where the international evidence base, and the South Africa-specific one, are now relatively good. Moreover, this is an area where the risk of disagreements amongst stakeholders is low.

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⁴⁷ South Africa: Parliament, 2017: 45.

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