MEANINGFUL ACCESS TO EDUCATION IN SOUTH AFRICA

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INTRODUCTION

Access to education is central in development strategies linked to the Millennium Development Goals (MDGs) and the Dakar Framework for Action associated with Education for All (EFA). The framework of post-apartheid legislation embodies South Africa’s commitment to these principles, and the right to basic education is enshrined in the Constitution. The South African case differs from a number of other developing countries with near universal access to education until the end of primary schooling.

Using the conceptual framework on access developed by the Consortium for Research on Educational Access, Transitions and Equity (CREATE), this article explores whether expanded access has provided learners with equal experience of, or access to, quality education. CREATE is concerned with understanding educational access for children between the ages of 5 and 15 years in four countries: Bangladesh, Ghana, India and South Africa.

CREATE understands educational access more broadly than simple physical access to school. True access includes equitable access to education that is meaningful. Meaningful access to education requires more than full enrolment; it requires high attendance rates, progression through grades with little or no repetition, and learning outcomes that confirm that basic skills are being mastered. Education adds more value to people’s lives when their freedom to choose is enhanced by meaningful access.

Educational access is examined in this article in terms of a model that describes seven zones of exclusion. The zones are applied to the South African context in the following way. Zone 0 is Grade R, the (as yet non-compulsory) entry point into the schooling system for learners aged 5 years (or turning 5 before the end of June). Zone 1 includes children who have never gone to school. Zone 2 includes those who drop out before the end of primary education (Grade 7), and Zone 3 contains learners who are at risk of dropping out in this same period. Zone 4 is the transition between Grades 7 and 8, or between primary and secondary school. Zone 5 contains those learners who drop out of Grades 8 or 9, and Zone 6 refers to young people of any age who are at risk of exclusion in these two years of lower secondary school.

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Table 3.1.1 provides information on the zones, and Figure 3.1.1 maps the zones in the South African context. In South Africa, there are very few children who have never been to school (Zone 1). Many younger children are enrolled in school (Zone 2) but, as Zone 3 shows, they are vulnerable to silent exclusion or drop-out, because of the absence of meaningful access and learning. Zone 4 indicates that transition from primary to secondary schooling does take place, with the majority of learners entering secondary school. Zone 5 shows that in the junior secondary phase, which is still part of the compulsory education system, most children are still in school, but there is limited drop-out. The peak in Zone 5 may illustrate the repetition that takes place in Grades 8 and 9. Zone 6 shows that learners become more vulnerable to silent exclusion and poor learning. There is a sharp drop-out rate from Grade 10 onwards, at the end of the compulsory phase of schooling.
This article outlines the policy and legislative context, and the financing of equitable access to education. It then provides an assessment of the patterns and causes of exclusion, followed by an analysis of how educational access is conceptualised, and some concluding comments in this regard.

THE POLICY CONTEXT

Under apartheid, significant numbers of children received schooling, especially in the primary grades, but Bantu Education severely limited the quality of education, and the apartheid regime consistently under-resourced black schools. During the 1980s, however, there was a considerable expansion of secondary schools for black learners. Since 1994, South Africa has been able to provide near universal access to basic education, albeit in a system fractured by racial inequity and offering poor quality schooling for the majority of learners.

Whereas education policy during apartheid provided for separate and different schooling for various racial groups, the focus of the post-apartheid democratic government has been to ensure equitable educational access in line with the Constitution’s Bill of Rights. Thus, after 1994, policy was developed to redress past inequalities in access and to ensure inclusivity. However, while government policies aimed to open up access to education, they were intended also to regulate and monitor it (Motala et al. 2007).

After 1996, in line with the Constitution, compulsory education was instituted from Grades 1 to 9, or from 6 to 15 years of age. This period of basic education is referred to as the General Education and Training (GET) phase and covers seven years of primary school and two years in secondary school. The final three years of secondary school are not compulsory, but the government is constitutionally obliged to make this Further Education and Training (FET) phase progressively more available. Learners can acquire an FET qualification by completing Grade 12 in the schooling system or by attaining an equivalent certification from one of 50 public FET colleges, or through opportunities offered by the private sector. Adult Basic Education and Training (ABET) offers an alternative route to both GET and FET qualifications, especially for young people and adults older than the 15-year compulsory age limit.

Responsibility for schooling (GET and FET) is concurrent between national and provincial government. The national Department of Education (DoE) takes the lead on developing national norms and standards, and creates the main policy and legislative frameworks, while the provinces take executive responsibility and make the funding decisions. Therefore, access differentials can be studied between and within the nine provinces. Provision of schooling is mainly public, with independent schools accommodating fewer than 4 per cent of learners in Grades 1 to 9 in 2004. In 2005, there were 11 902 316 learners in the education system, the majority of whom were in public primary schools. Learners in the latter category totalled 7 588 987, while those in secondary schools numbered 3 769 255 (DoE 2007).

Post-apartheid education policy was informed by its commitment to the fundamental right of all citizens to education, equity, redress and the improvement of quality. The structure of the education and training system was completely transformed, and new policies were designed to create an inclusive and efficient system. Attention was given to ensuring access of marginalised learners, children infected with HIV/AIDS and learners with special educational needs (LESEN). A progressive outcomes-based curriculum was introduced, as well as measures to monitor educational quality. Education governance was devolved to schools, among other things permitting School Governing Bodies (SGBs) to charge fees, with significant implications for educational access (see below). The policy on LESEN emphasises mainstreaming learners with mild learning disabilities into ordinary schools. The reception year, Grade R (for children turning 5 before the end of June), is currently being implemented, and the target is to reach full coverage of this grade by 2010. Pro-poor finance policies, school fee exemptions and, most recently, fee-free schools have assisted in getting indigent learners into class. While policy hoped to assist all children in realising their constitutional right to education, it also aimed to create a more efficient system by regulating repetition and by applying age-grade norms to minimise under- and over-age learners.
A review of policy and implementation suggests that the South African government has a political commitment and will to increase educational access on the basis of equality and social justice, in keeping with the EFA aims and MDGs. In the early 2000s, policy review processes attempted to shift access policies explicitly towards the needs of poor communities and disadvantaged learners. However, the contested nature of all policy development, and attempts to mediate competing stakeholder interests, inevitably resulted in compromise. Until recently, education funding to provincial education departments had been constrained significantly by the government’s macroeconomic and fiscal policies. The capacity and commitment of provincial governments to budget adequately for education and to spend funds effectively has been highly uneven. For several years, the expansion of education opportunity seemed to have taken second place to government efforts to curb wasteful expenditure and radically improve internal efficiency in provincial education systems. Therefore, while the government’s measures are undoubtedly equitable in intent, but by no means have they erased inequalities in education provision, access or outcomes.

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In order to create an enabling environment for access to quality schooling, issues of financing and resourcing continue to be of greatest concern. Current policies address the zones of exclusion in various ways, especially by actively seeking to reduce the number of out-of-school children (mainly, but not only, in Zone 1). The transition from primary to lower secondary schooling (Zone 4) appears to be managed reasonably successfully. The policy challenge is both about improving efficiency and about greater inclusion, and, at the same time, must ensure that younger children and those with special needs and learning difficulties are not excluded because of policies too intent on efficiency. There continues to be a need in South Africa to bridge the inequalities across the public schooling system through better redistribution and possibly expanded provision of resources.

**FINANCING EQUITABLE ACCESS TO EDUCATION**

Education expenditure increased from R31.1 billion in 1995 to R59.6 billion in 2002, to R105 billion in the 2006/07 budget, and is projected to increase to R127 billion by 2010 (National Treasury 2007). Over the same period between 1995 and 2007, education expenditure, in real terms, amounted to 19.9 per cent of consolidated national and provincial expenditures. Expenditure on national education represented 5.4 per cent of GDP in 2006/07. In 2009/10, national and provincial expenditure will represent 19.8 per cent of consolidated national and provincial government expenditures, at 5.3 per cent of GDP. The national education budget was projected to grow by 7 per cent in 2007/08 while sustaining a real growth of 5.9 per cent (National Treasury 2007). Figure 3.1.2 relates to provincial expenditure, and shows that education expenditure peaked around 1996, declined there after and then resumed growth in the late 1990s and after 2000.

Nevertheless, policy implementation has been constrained by the scale of the historic backlogs inherited from apartheid and the effects of inflation on education costs. Expenditure has also prioritised public ordinary schools, crowding out spending on other services like Inclusive Education, Early Childhood Development and Adult Basic Education.

Some headway towards equalisation was achieved through efforts at educator redistribution (post-provisioning), in terms of which many educators in previously advantaged schools were given the option to teach at previously disadvantaged schools or to apply for early retirement. However, this also resulted in large numbers of highly qualified educators leaving the profession.

Partly as a result of financial pressure, the South African Schools Act 84 of 1996 (SASA), among other measures, allowed for SGBs to raise additional capital by charging fees. One of the intended outcomes of charging school fees was to
encourage children from middle-class families to stay in public schools because those schools were able to hire additional educators, reduce learner-educator ratios and acquire other features that enhanced the provision of quality education. However, because wealthier school communities are able to raise substantially more funds than poor schools, fees have acted as a barrier to school access and have allowed for vast differentials to continue between schools.

Equity mechanisms, therefore, sought to redistribute state funding towards the poorest schools. The equitable shares formula sought to redistribute funding from the national level to provinces, based on a weighted average of demographically driven formulas that utilised the criteria of rurality, poverty and infrastructure development. The National Norms and Standards for School Funding (NNSSF) (DoE 1998), which took effect on 1 January 2000, dealt with public funding of schools, exemption of parents who were unable to pay school fees, and subsidies to independent schools. It required each provincial education department to rank all its schools from ‘poorest’ to ‘least poor’, and then to allocate funding for non-personnel purposes progressively. The NNSSF required that 60 per cent of the available funds be allocated to the poorest 40 per cent of schools.

Although significant in terms of redress, this policy has had a marginal impact on schools. The most important reason for this is that the overall amount available for the school funding norms is limited to non-personnel expenditure, which constitutes about 15 per cent of overall school-level expenditure. As the DoE has noted: ‘Despite dramatic increases in the value of the school allocation of learner support material (LSM) funds, in certain provinces the monetary value of this allocation is still too low’ (DoE 2006a). Secondly, the poorer schools often lack the financial capacity and expertise to access the budget allocated to them. Meanwhile, schools in the more affluent quintiles continue to compensate for reduced funding by charging higher school fees, thus maintaining existing differentials.

Technical targeting processes are important, no doubt, but it became clear that they were not sufficient to eliminate the deep structural disparities in South African education provision. Because of the substantial economic differences between provinces, better-off schools in one province could receive more state funding than the poorest schools in another. The resource targeting system was designed to address intra-provincial inequities but could not take account of inequalities among provinces, which resulted in different funding allocations to the same quintiles in different provinces. To address these concerns, the NNSSF was completely overhauled in 2006 and a national poverty ranking model was put in place.

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It is apparent that after a decade of democracy, South Africa has moved from an explicitly race-based and unequal system of public education to a national system intended to provide all South Africans with equal access to education opportunities. However, despite improvements and funding equity, many learners, especially in the rural areas, continue to lack access to proper infrastructure and have to manage with limited textbooks, badly stocked school libraries and poorly trained educators. It is clear that many South Africans do not have access to the constitutionally mandated basic education of good quality. The relationship between increasing resource outputs and education outputs, such as quality outcomes, requires more systematic research in South Africa. Evidence thus far indicates that educating children from poor families requires more resources than educating children from better-off families (Van der Berg 2006). The exact depth of institutional and social deprivation and the scale of disparities between South African schools have been vividly described by Jansen and Amsterdam (2006), Moll (2000) and Spreen and Vally (2006). What has also been noted is that despite significant policy shifts in terms of the overall distribution of resources, public expenditure on education is yet to reach sufficiently pro-poor levels and continues to marginally ‘favour the rich’ (Gustafsson & Patel 2006).

**PATTERNS OF EXCLUSION**

Access to basic education in South Africa is expensive when compared with other developing countries. Age-specific school enrolment rates for 6–15 year olds in South Africa stand at over 95 per cent. However, lower net enrolment rates — 87.4 per cent for primary schools in 2004 — suggest that learners are not in the correct grade for their age (most likely they are over-age).

Almost all school-age children are enrolled in schools, with just under 2 per cent of learners never entering a school. Statistically, therefore, Zone 1 is less of a concern than the
other zones of exclusion. Most learners stay in school through to the end of primary school, with 88 per cent of learners completing Grade 7 in 2003. This figure does not take into account repetition and drop-out in Zone 2, which is calculated to average 4 per cent (DoE 2007). In terms of the transition from primary to secondary school (Zone 4), the 2004 data show that 90 per cent of learners moved from Grade 7 to Grade 8 for the last two years of compulsory education. There has been a significant improvement in the completion rate of basic education, with an increase from 78 per cent in 1997 to 92 per cent in 2003 (Zone 5). Beyond CREATE’s zones of exclusion lie the post-compulsory, final three years of secondary school, which many young people battle to complete. The drop-out rate in Grade 11 is estimated to be about 30 per cent, and by the age of 19 years the drop-out rate is about 50 per cent. As the Ministerial Committee on Learner Retention in the South African Schooling System has noted, the high failure rate, repetition and drop-out from Grades 10 to 12 require urgent policy attention (DoE 2008a).

The specific policy challenge in South Africa is less one of enrolment and more one of retention, achievement and completion on schedule for age, especially completion of lower secondary schooling.

Zone 3 (Grades 1–7) and Zone 6 (Grades 8 and 9) include learners who are at risk of dropping out. These zones of exclusion are characterised by a range of endogenous and exogenous factors that limit learners’ abilities to contend with schooling. Exogenous excluding factors include poverty, rates of orphanhood, the environment in which schooling takes place and the impact of HIV/AIDS. Endogenous excluding factors include erratic attendance, over-age enrolment and repetition. These zones are also zones of silent exclusion, affecting learners who are present in class but underachieving.

The exact nature of the problem in Zones 3 and 6 is difficult to specify, although the following statistics reveal the scope of the problem and point to these zones as being the most important for further research:

- 32.8 per cent of households received a government grant in 2003 based on poverty. The grants impact positively on school access, encouraging vulnerable children to enter school and stay there.
- 22 per cent of children (aged 0 to 19 years) eligible to receive the Child Support Grant are not receiving it.
- 7 per cent of children are always or often hungry, and just over 17 per cent of children are sometimes hungry (2003 figures). As a recent Organisation for Economic Co-operation and Development (OECD) report on South Africa notes, ‘a poor child is often a hungry child’, and this impacts on learning and academic performance.
- The impact of HIV/AIDS is evident in the growing number of orphans. In 2003, 17.4 per cent of children had lost one parent and 3 per cent of children had lost both parents. (OECD 2008)

The key issue for CREATE is how to address meaningful educational access for girls and boys from age of 5 to 15 years. The specific policy challenge in South Africa is less one of enrolment and more one of retention, achievement and completion on schedule for age, especially completion of lower secondary schooling. Achievement data show the very low levels of basic skills acquisition by Grades 3 and 6. The South African case also shows that the actual age of entry is often more (occasionally less) than the official age. Many children are in grades below those appropriate for their age. The age of primary school completion is perhaps several years above the nominal age for the last grade, and many primary school children are of secondary school-going age. Late entry appears to reduce the chance of completion and exacerbates slow progression through the grades.

South Africa is close to achieving universal basic education, particularly when one considers gross enrolment ratio figures of over 100 per cent and a net enrolment ratio of close to 85 per cent for the compulsory phase of schooling. Almost all learners enter school and the majority reach the end of Grade 9. However, there are many vulnerable learners who are prone to dropping out during the compulsory phase of schooling, either as a result of poverty and an inability to afford schooling costs, because of trauma related to HIV/AIDS, which also robs families of breadwinners and imposes care-giving demands, or because of low achievement and poor teaching. The poor quality of schooling contributes to repetition, with both learners and parents losing faith in the education system. This is particularly evident in the post-compulsory phase of schooling, given the large drop-out of learners after Grade 9. The biggest access problems in South Africa, therefore, reside in Zones 3 and 6.
Although information from the Education Management Information System allows us to view provincial and national averages, the data need to be handled with caution. When learner numbers are collected from schools, there is a possibility that they are inflated because teachers and non-personnel resources are distributed partly according to learner numbers. The more learners a school claims, the more funds they can claim from the state. It would be useful, therefore, to check national averages against quantitative studies of access patterns on a smaller scale. Data on transition, completion and repetition will have to be calculated from provincial, district and school-level databases to provide a more comprehensive picture of access. Household surveys will provide valuable socio-economic and other data.

**THE CAUSES BEHIND EXCLUSION**

Several factors that permeate contemporary South African society, from the economy to the school and from the family to the individual, have been identified as causes of exclusion. All of them put pressure on vulnerable learners, affect their learning and can eventually lead to their departure from school. These factors can be organised around two major themes. The first is a set of economic and social factors, including the indirect cost of education and social factors that include family structure, gender and HIV/AIDS. The second is a set of school-related factors such as discrimination, racism and sexism, and educator unpreparedness, and personal factors such as the health of, support for and motivation of learners themselves. The remainder of this section reflects on these.

**Economic and social factors**

South Africa’s enrolment rate is high, even in circumstances where households have experienced economic or social stress. There is little evidence in the South African context that child labour disrupts school enrolment (though it may impact on performance), despite the fact that it is widespread in the country. Neither is there a ‘Cinderella effect’ on the schooling of foster children: foster children are just as likely as the blood-related children of a household to be in school, although they may be behind in terms of their age. HIV/AIDS seems to have a greater impact on the school attendance of older rather than younger children. There appears to be a routine of school attendance in South Africa that may even provide a measure of stability for households in times of crisis.

However, despite high enrolment, vulnerability to drop-out or silent exclusion is a major problem and, as noted above, this is particularly so in Zones 3 and 6. The quality of education for the majority of learners is still substandard and, pressurised by poverty and illness (which is not limited to HIV/AIDS), many are susceptible to dropping out. Protracted poverty appears to be the most important reason for learners being out of school. The depth of poverty – in terms of material deprivation, social isolation and their psychological consequences – distinguishes the children who were not in school from their school-going peers in the same poor community.

Economic factors, including the indirect costs of schooling, affect access. Difficulties in paying school fees should be alleviated as the fee-free school policy is implemented in the poorest schools, but the costs of transport, school uniforms, books and stationery add extra burdens to already-stretched household budgets. Among the costs of schooling, transport expenses are the single biggest impediment to educational access for those who do not walk to school.

Several studies have gauged that cash transfers such as the Child Support Grant have a positive effect on enrolment, especially in ensuring that learners begin Grade 1 at the appropriate age.

**School and personal factors**

Schools themselves play a big role in encouraging or discouraging access. Many learners who have structural access to schooling are present (as is reflected by high enrolment rates) but are learning very little. What this means is that they do not have access to the content knowledge and skills needed to reach the required levels of achievement and competency. This is evident in the following:

- Learners in South Africa, and especially those in township and rural schools, are not competitive in comparison with international levels of achievement such as the Trends in International Mathematics and Science (TIMMS) study. It is also significant that South African learners fare poorly in relation to their regional counterparts in Botswana and Malawi (Howie & Plomp 2006).

- Learners in Foundation Phase classes are unable to read and write adequately, and their educators are unable to properly teach them how to do so. This is reflected in the low scores achieved in the Monitoring Learning Achievement (MLA) project undertaken by UNESCO, which looked at numeracy and literacy scores (Chinapah et al. 2000).

- What is often related to poor quality learner performance is educator content knowledge, their pedagogical skills, and their presence in or absence
from classrooms (i.e. educator contact time). Educators, in turn, have suggested that the new curriculum has brought onerous burdens with more administrative responsibilities for educators (Chisholm et al. 2005).

Various other underlying social phenomena, such as racism, sexism, bullying and xenophobia contribute to unwelcoming conditions in schools. Given apartheid's legacy, the problem of racial integration in schools has received a great deal of attention—although proportionately multiracial schools are a minority. While schools are no longer allowed to discriminate on the basis of race, other exclusionary devices have limited access to comparatively better-resourced ex-whites-only schools: their geographic location, usually far from where most black learners live, their high fees and their often unwelcoming cultural ethos.

The gender of learners has a direct impact on educational access and performance. Patriarchal male attitudes and behaviour towards schoolgirls is a matter of serious concern, with girls frequently encountering rape, abuse, harassment and assault by male classmates and educators. There are more girls than boys in the system from Grade 6 to 12, and girls are less likely than boys to regard education as irrelevant. Pregnancy is an important factor in schoolgirls dropping out.

Another factor contributing to poor outcomes has been the way in which children with learning disabilities have been dealt with in the system. While policy emphasises the mainstreaming of children with learning barriers into ordinary schools, no additional financing has been allocated to support this. Children with learning barriers, therefore, seldom receive the necessary support.

Parents and guardians are not always able to provide the necessary background and knowledge of schooling to support their children, and this may provide at least one clue as to why many learners fail and repeat. Correlations between mothers' and children's educational levels are really significant only if mothers have been substantially schooled. Not unexpectedly, educated parents are more likely to provide support for learning and to send their children to better schools.

Individual learners' and parents' assessment of the relevance of education is a key motivating influence on continued attendance at school. After fees, the most important reason why learners remain out of school is their perception that it is useless or uninteresting; almost 10 per cent of learners overall, and more boys than girls (13.5 per cent as against 6.5 per cent), hold this depressing view of the value of education (Stats SA 2006).

Unfortunately, such perception cannot be countered yet with empirical proof from the South African context. Research on the amount of schooling that is required for higher rates of monetary return in the form of earnings is still inconclusive. While some argue that such returns are probable, others contend that the benefits of basic education are indeed negligible.

While our review is not a comprehensive portrait of all factors affecting access to schools, the research on which it is based, supported by statistical analyses, sketches a bleak picture of access patterns in South Africa. Most learners enrol in and complete primary education, but late entry and relatively high repetition rates have a slowing effect on progress through the system. Marginalisation and poverty are significant factors in the generally slow transition rate through the grades. There is a great demand for schooling, despite numerous barriers to success and poor quality of outcomes, which are partly a consequence of unwelcoming schools and uncaring educators. Learners, too, are not blameless, lacking discipline and motivation. Yet many parents, themselves of meagre means and even more miserable schooling, are so keen on education for their children that they are prepared to foster them to relatives in order to improve their chances of accessing school. Withdrawing learners from basic education appears to be a measure of last resort— even in the context of HIV/AIDS.

Given the generally positive culture of school-going in South Africa, the poor quality of schools is a haunting worry.

CONCLUDING COMMENTS

It is suggested above that the experience of apartheid education requires a view of educational access that is wider than mere structural access to schooling. Under apartheid, most black South Africans did have access to schooling, but this access was based on separation and inequality. In the light of the CREATE model, which is particularly relevant to the South African case, it is evident that educational access is not only about how many learners of school-going age are in school, nor even about how many successfully complete their schooling. Educational access is also about who has access to what kind of schooling, and on what basis.

Education policy in post-apartheid South Africa is based on legislation and procedures aimed at increasing educational access for all South Africans, as a human right and on the basis of equality. These laws and procedures determine budget and resource allocations intended to improve and expand educational provision in poorer schools and areas. In the context of the history of education in South Africa, this constitutes a highly significant reallocation of resources for the purposes of transforming and redressing the legacy of
apartheid and creating a much more democratic dispensation. However, as our earlier discussions illustrate, many South Africans still do not benefit from increased access, and tend to drop out after junior secondary schooling because of a variety of factors that include poverty, unaffordable fees, low achievement, HIV/AIDS, poor health and nutrition, pregnancy and discrimination. Regrettably, much of the problem also resides in low levels of motivation and commitment amongst learners, their parents and educators alike. South Africa's achievements with regard to school access and high enrolment, in contrast to many other developing counties, must not be underestimated. However, this should not be permitted to distract us from a much bigger challenge, that of giving substance to the formality of compulsory schooling.

What has been argued here is that two major conceptions of educational access prevail in education policy and research. These are of structural access and meaningful access. In many EFA programmes in South Africa, educational access is presented as a supply-side issue that can be resolved if enough places are provided. While structural access to education is necessary, it is not sufficient by far to achieve quality EFA (Colclough & Lewin 1993). Meaningful access has to be achieved, which requires a focus not only on the rates and economic implications of such experiences but also on the processes and dynamics that construct them. This will make an important contribution to a just and equitable experience of schooling.