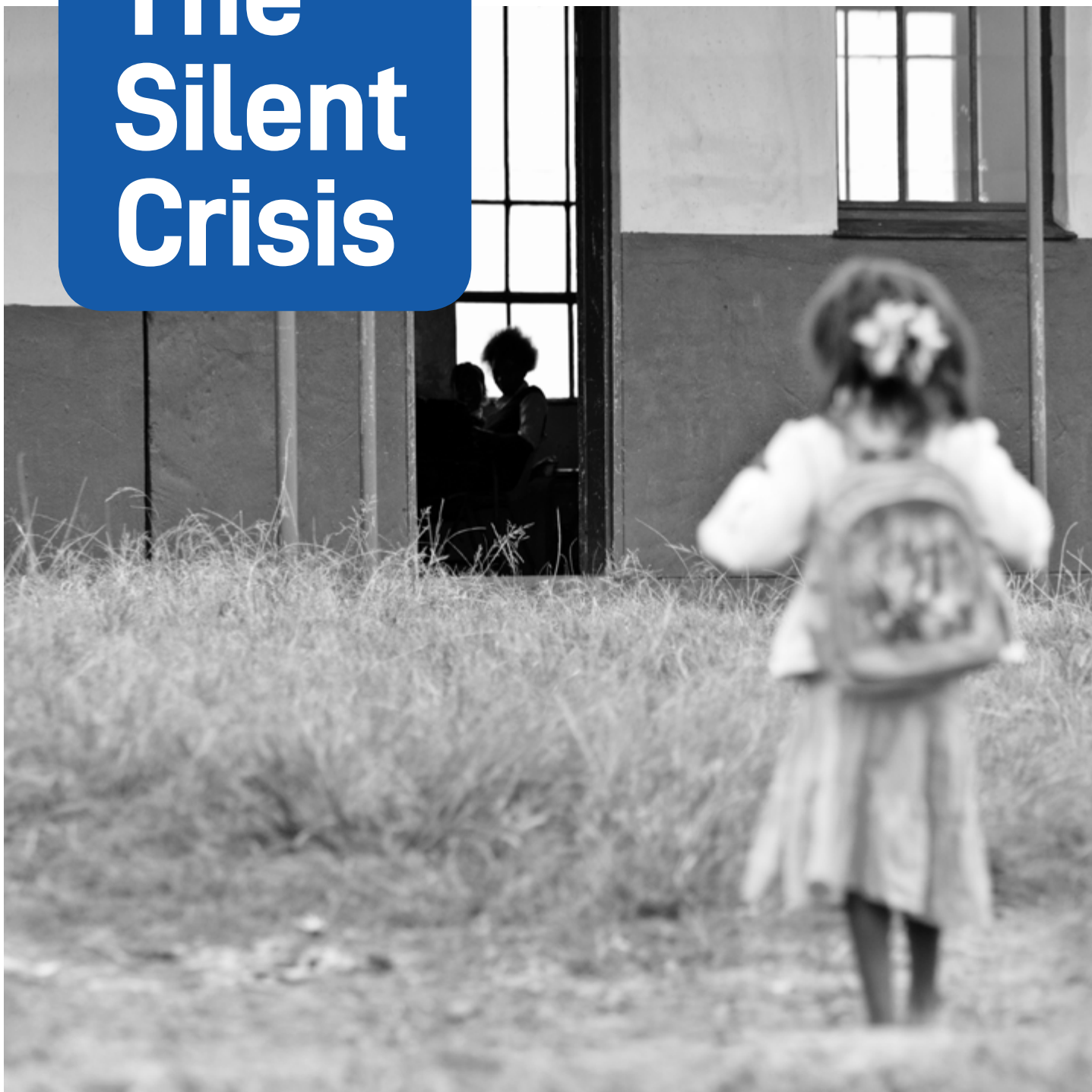


The Silent Crisis



FOUR

**Lessons for
education
reformers**



About CDE

The Centre for Development and Enterprise (CDE), an independent policy research and advocacy organisation, is South Africa's leading development think tank. Since its establishment in 1995, CDE has been gathering evidence, generating innovative policy recommendations, and consulting widely on issues critical to economic growth, employment and democratic consolidation. By examining South African and international experience, CDE formulates practical policy proposals outlining ways in which South Africa can tackle major social and economic challenges.

CDE has a special focus on the role of business and markets in development. CDE disseminates its research and proposals to a national audience of policymakers, opinion formers and the wider public through printed and digital publications, which receive extensive media coverage. Our track record of successful engagement enables CDE to bring together experts and stakeholders to debate the policy implications of research findings.

Series Editor: Ann Bernstein

This report was written by CDE research director Dr Stefan Schirmer and policy analyst Rehan Visser.

Photo credit: A young South African girl stands outside of school, nervous to enter on her first day of class, by Getty Images

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The Silent Crisis

The failure to meaningfully transform South Africa's dysfunctional schooling system, despite significant public expenditure, is the quiet crisis and disaster of the democratic era. Tragically, while some reform measures in the 2000s proved successful, these gains did not last and have now been reversed during Covid. South Africa remains at the bottom of all international tables on learning outcomes: reading, maths, science. As a result, the majority of poor, mainly black, children in South Africa still do not receive the education they need to escape poverty. This is a national emergency that must be addressed.

In this series of reports, CDE identifies the root cause of this failure and makes the case for fundamental, systemwide reform that focuses on improving the quality of learning in the classroom. South Africa needs a President committed to education reform as a priority and a Minister and team of education leaders who can design and implement an effective reform agenda. This will require decisions that disrupt the status quo and those who benefit from the current dysfunction. It will also require all those South Africans who will benefit from and care about a much more effective and more equal education system of good quality, to mobilise in favour of reform.

This report is one of five in a CDE series on diagnosis, priorities and recommendations for basic education reform.

- ONE: South Africa's failing education system
- TWO: What's wrong with our education system?
- THREE: The forgotten story of state capture in education
- **FOUR: Lessons for education reformers**
- FIVE: Time to fix South Africa's schools

List of acronyms in this series

ANA	Annual National Assessment
CAPS	Curriculum and Assessment Policy Statement
DAS	Development Appraisal System
EE	Equal Education
EGRS	Early Grade Reading Study
FET	Further Education and Training
HLO	Harmonised Learning Outcomes
IQMS	Integrated Quality Management System
MPAT	Management Performance Assessment Tool
NAPTOSA	National Professional Teachers' Organisation of South Africa
NECT	National Education Collaboration Trust
NEEDU	National Education Evaluation and Development Unit
NEIMS	National Education Infrastructure Management System
NIAF	National Integrated Assessment Framework
NIDS-CRAM	National Income Dynamics Study – Coronavirus Rapid Mobile Survey
NSNP	National School Nutrition Programme
PEU	Professional Educators' Union
PILO	Programme to Improve Learning Outcomes
PIRLS	Progress in International Reading Literacy Study
PISA	Program for International Student Assessment
SACE	South African Council for Educators
SACMEQ	Southern and Eastern Africa Consortium for Monitoring Educational Quality
SADC	Southern African Development Community
SEA	Schools Evaluation Authority
SNTE	Sindicato Nacional de Trabajadores de la Educación
TIMSS	Trends in International Mathematics and Science Study
UNE	Unión Nacional de Educadores

Lessons for education reformers

Introduction

Our education system is failing the learners it is meant to serve. Millions and millions of South African children, mostly black, attend schools where little learning takes place. (See Report ONE.)

The only way to bring about meaningful change is to tackle the sources of dysfunction that exist deep within the system that manages our schools. We need to raise the accountability levels for bureaucrats, principals and teachers to ensure that they are motivated to do better and suffer real consequences if they do their jobs badly. We also must raise competency levels of managers and teachers in the system through a combination of improved in-service training, greater support for existing educators and bringing in new people with higher levels of competency and managerial experience.

The case for a reform agenda that simultaneously tackles the core challenges at the heart of our dysfunctional education system is very strong. Persuading people of this, is the first part of the battle. Equally important is convincing government to actually implement these changes. This report looks at the obstacles holding back the implementation of education reform in South Africa and reviews how other countries facing similar challenges overcame those obstacles. If South Africa wants to see the determined execution of systemwide reform, then this report sets out key lessons for potential reformers to consider.

Obstacles and opportunities for reform in South Africa

Teachers and their unions

There is widespread agreement among education experts that successful reform depends on involving teachers in the process. Teachers should be held to account for the results they generate, but in education it is difficult to measure exactly who is responsible for the poor performance of learners. Forcing teachers to focus purely on test results frequently creates aberrant behaviour and might even undermine core elements of good teaching practice. In that context, unions often tend to push back against any attempt to strengthen accountability.

“Its political power as a member of the ruling Tripartite Alliance gives SADTU a powerful bargaining position against the introduction of a programme of fundamental system reform”

Some might draw the conclusion that confronting dominant unions is the only way to make any progress with reform. This, however, is a daunting and potentially dangerous strategy. The majority of teachers in South Africa are members of the South African Democratic Teachers Union (SADTU)¹, an organisation that has resolutely opposed the introduction of meaningful performance management in education. According to the ministerial task team (MTT) investigation released in 2016, SADTU is staffing and running at least six of the country's nine provincial education departments (PEDs). On top of this, its political power as a member of the ruling Tripartite Alliance gives SADTU a powerful bargaining position against the introduction of a programme of fundamental system reform. Its power is so overwhelming that basic education minister Angie Motshekga in December 2015 is reported to have said that teacher unions have a “stranglehold” over the South African schooling system.²

Unions and teachers have a long-term interest in improving education outcomes and raising the status of their profession. (See CDE's report, *Teacher professional standards for South Africa: The road to better performance, development and accountability?*) Consequently, unions can, under the right circumstances, be encouraged to engage with the reform process rather than try to block it completely. However, while unions should ideally be included in discussions on how to turn around the system, they cannot be allowed to hijack the process or use their power as a way to block necessary changes. There have to be non-negotiable areas where union opposition is deemed unacceptable. One such area is the fight against corruption and cadre deployment, for which there should be unequivocal support. A second is the principle of performance management. South Africa cannot allow the DBE to operate with few if any ways of managing performance.

Improving the currently inadequate levels of teacher support and development is, in this context, especially important. We know that getting teachers to feel accountable for their work can be difficult in a low-support environment. Providing teachers with effective, consultative support can encourage them to take ownership of their work and outcomes, and thereby embrace the goal of raising learning levels in schools. Important work has been done to showcase pedagogical support and provide learning materials, which have helped raised the bar on teaching performance. Other reforms to get teachers onside should also be considered, including the idea of linking performance – actual performance, not self-evaluations thereof – to teacher pay. While there is little scope in our current fiscal circumstances to raise absolute pay for teachers to get them to support a reform process (a strategy that has been employed in other countries), rewarding teachers who perform well could be a way to at least get some teachers to become more supportive of fundamental reforms.

Social pressure from 'below'

In South Africa, the broader demand for reform is, in the opinion of many respected educationists, underdeveloped. Our poor results in global standardised tests ostensibly "provoke a sense of national shame, angst and failure", this has not yet translated to widespread critiques or substantive nationwide interventions.³ Astonishingly, given what we know about our poor education outcomes, Stats SA found in 2019 that only 1.2 percent of South Africans take issue with the quality of education received by children in their households, while 69 percent of households using public schooling say that their local public school is 'good'.⁴ This is difficult to understand. But on the other hand, there is evidence that many poor black parents exercise the 'exit' option by sending their children to a school outside their immediate locale. Poor black parents also look to send their children to historically white or Indian schools, as they perceive these to be stepping stones on an upward social mobility trajectory.⁵

"Only 1.2 percent of South Africans take issue with the quality of education received by children in their households"

Clearly, something needs to change. One option that the DBE has suggested (but not committed to) is to release school report cards, i.e., public information on the performance of a school. Mobilising for school report cards to be made available to local communities could be an effective way of improving school-level accountability. As the National Development Plan 2030 (NDP) states, "Providing meaningful information to parents on their children's performance can enable them to hold schools accountable. Performance tends to improve when parents are actively involved and take an interest in the affairs of the school."⁶ A randomised control trial in Pakistan found that learners of parents provided with school report cards providing information that compared local schools

had test scores 42 percent higher than those in control villages who did not receive report cards.⁷ It is vital that information that is shared is reliable and intelligible to parents.⁸

There have also recently been some promising signs on which it may be possible to build. One example is a march by schoolchildren from Gqeberha to the Eastern Cape Department of Education (ECDOE) headquarters in Zwelitsha, 260km away, in December 2019, before the Covid-19 pandemic. Unlike many previous marches organised by nongovernment organisations (NGOs), which complained about teacher shortages and the lack of infrastructure, this protest was led by the learners themselves (hopefully with their parents' support), many of whom wrote essays decrying the lack of commitment and time spent on task by their teachers. One learner expressed their condemnation as follows:

I hate that our teachers are not committed to us. They do not teach. They do not care about us. The only time our teachers teach is when they know someone from the department is coming to inspect the school. We want the department to send more monitors. That is the only time that they are committed.⁹

There were numerous other letters with a similar theme lamenting the lack of accountability by teachers and their consequent lack of interest in performing their jobs. Following the learners' protest, the learners revealed that in January 2020, the ECDOE was paying unannounced visits to their schools. Education activist John Lombardo, who was involved in the walk, said that "There were also lengthy meetings with the administration and staff members. They [the children] saw teachers running up and down looking for documents. Who knows what will change in the end, but this is clearly a result of our walk."¹⁰ This demonstrates how increased pressure from local communities on the issue of education quality can reap dividends.

"I hate that our teachers are not committed to us. They do not teach. They do not care about us"

In another recent incident, teachers at Emzameni High School in Pietermaritzburg were locked out of school premises by parents as a result of union rivalry that caused learners to miss classes. "We are tired of coming to the school for nothing. Their problems must not affect us. We are at school for education and nothing else," said one matric learner. A parent said that they want the teachers to be fired: "[We want] teachers who are prepared to teach our children. The community has all the power, not them. They must go."¹¹

These are hopefully signs that parents and communities are recognising their potential power to hold the system accountable for the quality of education received by learners, and that the national conversation on education is starting to focus on the critical issues needed to achieve better outcomes. It is important to give more publicity and support to these and other similar examples to gain momentum for reform.

The media's role in disseminating information is also vital. The SADTU jobs-for-cash racket received media attention for a short period of time but did not get sustained follow-up and analysis. When the MTT's final report was published it received only muted coverage, allowing the minister to get away with shelving it. It is also understandable, although not very helpful, that media tend to focus on 'juicy' school issues, such as crime, violence and the presence of pit latrines at schools at the expense of broader systemic challenges. Many NGOs, too, mostly avoid addressing systemic issues. Prominent non-profits frequently speak out about derelict schools, terrible toilets, textbook provision and a lack of menstrual hygiene products, which affects learner attendance for many poor girls.

These are all undeniably vital issues that merit attention. However, most education stakeholders do not collectively speak out enough about the issues that constrain the quality of teaching and learning, and they do not place enough emphasis on broad educational outcomes. If we want government to address this, different parts of our society need to agitate for it loudly, effectively and collectively, and get to the point where raising the quality of our schooling results becomes a significant issue for many more South Africans.

The private sector

The private sector has a vital (potentially decisive) role to play in pushing for fundamental education reform. Many companies have an interest in improving the system that produces the workforce of the future. Some have sought to demonstrate their commitment to this issue by investing in a vast variety of education projects and schemes. Many of these have made a real difference to beneficiaries, but the reality is that, overall, corporate social investment spending over many decades has failed to make the kind of difference the country needs to help turn the education system around. Business in general has not used its collective heft to push for fundamental education reform, nor has it coordinated the lessons learnt from its myriad projects: to share what works or does not, to develop a coherent strategy for education reform, or find ways to bring effective public pressure to bear on what needs to be done.

“Organised business needs to be a leading voice demanding systemwide reform of our low-performing education system”

CDE argued more than a decade ago that generous as private sector funding on education has been and continues to be (along with early childhood development some R3.4 billion in 2019), it is important to appreciate that private spending on education is barely 1 percent of the national education budget. In CDE's view, "The most effective use of private money is to influence how public money is spent."¹²

To some extent this message has been heeded. More and more, the private sector has contributed its funding and expertise to large-scale experiments that function as research and development (R&D) for new attempts to improve educational practices. Many of these projects are public-private partnerships, some of which have produced positive outcomes. They have brought new ideas, new resources and new energy into the system. However, it is vital that such experiments are properly and independently evaluated, and that the lessons from these evaluations are disseminated throughout the system. There should be no reticence about releasing results that reveal challenges rather than achievements. (For more on this trend and the work business has been doing to improve learning, see CDE's November 2020 report, *No Longer Business as Usual: Private sector efforts to improve schooling in South Africa.*)

However, businesses could and should do much more to focus on the failures of the system as a whole and call for and work towards systemic education reform. Organised business needs to be a leading voice demanding systemwide reform of our low-performing education system. Rather than supplementing or propping up the work of the DBE, companies should use their position and influence to demand reforms within the department. In addition, business organisations and senior business leaders should lend their voices and provide resources to initiatives that raise the pressure on government to implement real reforms. It would be helpful if private sector funds aimed at improving the quality of education were used more strategically and geared more directly towards bringing about fundamental change.

Business investors in education need in our view to consider the following questions and issues:

- What kind of programmes to fund and why? Does it contribute to overall societal pressure for reform?
- Are they part of a more coordinated and larger *systemwide reform* effort? How does anything the private sector supports strengthen that?
- The importance of a growing chorus of voices calling for fundamental reform cannot be overemphasised. Pressure must come from all actors with a stake in the quality of learning. It will make it more difficult for vested interests to oppose reforms when they enjoy widespread support.
- The best way for systemwide reform to be enacted and entrenched is if business, philanthropic foundations, civil society, the media, parents and learners themselves (and hopefully, teachers, principals, union leaders and education officials, too) push collectively for fundamental change and monitor the speed and efficacy of its implementation.

Political leadership

In 2009, Naledi Pandor had come to the end of her tenure as minister of education. In a forthright interview, she articulated the difficulties of her position as a minister who understood the need for fundamental reform in South Africa:

We need courage in the country to confront teachers' unions... We in the ANC [African National Congress] need to have the courage to speak out when things are not right. Sometimes you're bedevilled by wanting political support, so you don't always say what you want to.¹³

“Leadership at the highest political level, supported by other leaders in society, is critical for education reform”

It is clear from the interview that, without support from the President, fellow cabinet members and the ruling political party, Pandor felt unable to act decisively on the need for real change in her portfolio. Perhaps this is also what has prevented the current minister from undertaking fundamental systemic reforms. The nature of political dynamics in the ruling party and its allies, which includes SADTU, is such that basic education ministers cannot implement reform on their own. It must be backed fully by the President of the country, who in turn needs to mobilise and achieve broad public support for the tough actions required to fundamentally reform the education system.

Leadership at the highest political level, supported by other leaders in society, is critical for education reform primarily because reform is politically risky. The costs, most often to unions and, by extension, teachers, occur in the short term, while the (potentially far greater) benefits accrue to learners, their families and communities, and the economy and society at large in the medium and long term. Moreover, some stakeholders are more organised and easily mobilised than others, something that is particularly true of teachers when compared with parents.¹⁴

Getting reform to happen therefore depends on the President and the minister (and premiers and MECs) accepting that improving the quality of basic education requires more than add-on initiatives. Unfortunately, President Cyril Ramaphosa's promise in the 2019 State of the Nation Address (SONA) to provide every schoolchild with a digital tablet and to introduce coding and robotics as subjects for all learners, though no doubt well-intentioned, evades the critical issues hampering educational performance. (For more on the difficulties with digital learning, see CDE's May 2020 report, *Are we asking the right questions about... Reopening schools?*) And although the

President pledged to get every Grade 4 learner to read for meaning by 2030, nothing has really been done by national government since he made that extremely ambitious commitment.¹⁵

Systemwide reform in contested environments: Four Latin American case studies

How do we overcome the obstacles that stand in the way of getting an integrated education reform programme off the ground in South Africa? To find answers, CDE reviewed several international education reform programmes implemented with varying degrees of success. While we learnt about impactful initiatives across the world, including in Vietnam, São Paulo in Brazil and the state of Delhi in India, we focus here, on the advice of leading global education experts, on four Latin American case studies: Ecuador, Peru, Chile and Mexico. These four countries face similar socioeconomic challenges to South Africa, including high levels of poverty and inequality, and confronted similar obstacles to those faced by reformers here. They thus offer excellent insights on different mechanisms we can adopt, pitfalls to avoid, and paths we can take to make systemwide education reform happen.

Ecuador: Sustained reform with a popular mandate

In Ecuador, the major teacher union, UNE, was highly politicised with close connections to political parties and a major say over teacher appointments and promotion processes. This allowed union leaders to mobilise teachers for elections, campaigns and other political work. Once they got their people into power, union leaders could leverage their political power to get union sympathisers appointed to top administrative positions in the education ministry, thereby consolidating their power.

After a new President, Rafael Correa, was elected in 2006 with a strong mandate to overhaul education, he initiated a fundamental reform programme. The reforms included higher standards for teacher recruitment (through a more centralised process), higher entry standards for teacher training, regular teacher performance evaluations, promotions linked to competence and dismissal from the civil service after successive poor performance evaluations.

“This is a key lesson for reform in South Africa: reformers must control the narrative”

These reforms met with bitter resistance, especially from the unions. However, certain things counted in Correa's favour: there was strong public support for reform, there was a commodity boom and there was clear and effective communication from a united national policy reform team to the public. Oil money helped: total education expenditure quadrupled, teachers' salaries were doubled and many older teachers who did not want to be subjected to performance evaluations opted for early retirement packages. As a result a younger, better-trained cohort of teachers was established. Meanwhile, in response to UNE's opposition, Correa rescinded the union's automatic dues collection. In the face of changing public sympathies against the union, UNE was dissolved in 2016 and major reforms of education policy were consolidated. As a result, Ecuador experienced significant learning gains between 2006 and 2013: the largest in reading and second-largest in maths across Latin America.

Strong, clear leadership from Correa and a unified state was crucial in getting the public onside and in making reforms happen. Weakening the opposition by bypassing the unions to directly get teachers' support for reform measures through incentive schemes and simultaneously drying up unions' access to automatic salary deductions for membership fees ensured that he would not face sustained opposition to his reforms. Another part of Correa's success was the use of a top-level communication strategy and team to make sure that the public knew what he was doing on education reform, why it was necessary, how it would improve the system and how the process was unfolding. This is a key lesson for reform in South Africa: reformers must control the narrative.

Chile: Gradual reform backed by social partnerships

In the mid-2000s, the government of Chile sought to intensify the national conversation on education reform. It established an agency for research institutes to measure and collect data about teaching and learning performance through high-quality assessments. As the body of evidence for Chile's poor educational outcomes grew, students and their families, with the help of civil society groups, demanded reforms. Following the success of this research agency, a second one was later established. Suddenly there were several think tanks and academics writing in the media, arguing for evidence-based reform.

The main teacher union at the time, the Colegio de Profesores, was not very politicised. Although leaders of the Colegio were engaged in party and electoral politics, it had no say in teacher or departmental appointments. The union did not have sufficient power to block the introduction of periodic teacher performance evaluations, so it bargained with the government through a consultative process to influence the ways in which the reforms were implemented. The union was engaged in the design and negotiation of various reforms, from school-based bonuses to teacher evaluations and then individual bonuses. The upshot was that reforms took teachers into account, were successfully pushed through and widely embraced.

“Another reason behind the reform success is that it was done gradually, minimising the degree of resistance”

Another reason behind the reform success is that it was done gradually, minimising the degree of resistance. For example, teacher accreditation standards were incrementally improved through various measures. Taken together, these measures meant that teacher buy-in was secured via state collaboration with teacher unions, resulting in little resistance from teachers during the execution phase. The reforms have paid off – Chile's 2015 Programme for International Student Assessment (PISA) results in science, reading and maths improved by two years' worth of additional learning from the 2000 baseline.

Chile is an excellent example of how vital countervailing forces to those of the status quo such as the media, civil society and academics are for the topic of education reform to embed itself in the national discourse. It is critical to have a public voice representing the interests of learners and parents, as they are the ones who can hold schools accountable for their performances if poor results are to have real consequences.

Peru: Wholesale reform after a PISA 'shock'

In 2012, Peru received a 'PISA shock' when it was revealed that, of all 65 participating countries, it had come last. Although its own national system of Grade 2 learning assessments had revealed low learning levels since its introduction in 2003, it took the comparison with global peers to hit home for Peruvians to appreciate how poorly their education system was faring.

In the wake of the ensuing national outcry, the government responded quickly. Jaime Saavedra, until then a senior World Bank official working to reduce poverty, had been appointed as education minister that year. Reflecting on the significance of the moment, Saavedra writes, "Education was on the front page of the main newspaper of the country. And education is never on the front page of the newspaper... The government could have decided to downplay the results... But that was not the chosen route. Instead, the government decided to own the problem."¹⁶

In an October 2022 meeting with ex-minister Saavedra, now Global Director of Education Practice at the World Bank, he explained how he initiated a four-fold systemwide reform programme.¹⁷ The four pillars of the reform agenda were: improving the quality of learning for all pupils; enhancing the social recognition of teachers' value; advancing the effective management of the education system; and closing gaps in infrastructure. With public support for the reforms high and teachers, including union leaders, participating in the reform design, Saavedra was able to enact a raft of important system changes, including:

- Teacher and principal entrance exams and promotion evaluations
- School bonuses based on performance
- Boosting the role of principals and administrative staff responsible for hiring processes
- Use of performance data
- The development of teacher professional development standards
- Curricular reforms
- Expansion of early childhood education
- Greater investment in infrastructure.¹⁸

The reforms have been remarkably successful, with increases of 8 percent in reading and science and 6 percent in maths for Grade 3 learners in PISA between 2009 and 2015 (the bulk of which came during the 2012-2015 period). These gains were the fourth-fastest of all PISA members and the fastest of all Latin American countries.¹⁹ Further improvement was registered in 2018.²⁰

Mexico: Rapid reform in a highly politicised context

In Mexico, the dominant teacher union, SNTE, expanded its political patronage to the point where it was a major political player and a key prohibitor of policy changes. Consequently, education quality was kept low. In 2009, before Peru achieved that feat, Mexican students came last in the PISA rankings. Public teachers were routinely absent – 13 percent never showed up at all – and the union was embroiled in irregularities relating to pay and appointment processes. Teachers buying their way into the profession was common practice; SNTE would act as a broker for retirees selling their posts to new teachers.

In a context of growing discontent about education results across Mexican society, presidential candidate Enrique Peña Nieto made education reform a crucial element of his election campaign in 2012. Once in power, the new President introduced education policies unilaterally rather than working with SNTE, as his predecessors had always done. Under Peña Nieto, SNTE leaders were not appointed to senior positions in the education department; instead, the head of the organisation was arrested and indicted for embezzlement of union funds. The new, weaker SNTE leadership was forced to cede ground to the new administration and iniquitous teaching practices were overturned in a very short space of time. Several reforms were implemented as a result. A stronger regime of teacher evaluations was introduced. A new entrance examination was established for the purpose of hiring teachers based on merit. The Constitution was amended to guarantee children a high-quality education. These reforms produced marginal improvements by the time of the next PISA results in 2015, but they showed that Mexican students still performed poorly. More time would be needed for the effects of the reforms to show. This was not to be.

“The government could have decided to downplay the results... But that was not the chosen route. Instead, the government decided to own the problem”

It was clearly crucial for Peña Nieto's ability to implement reforms that he took on a strong role and appealed to public support to back his reforms. However, the President's confrontational approach resulted in severe pushback. Protracted strikes and direct action continued for the duration of the President's term, undermining any possibility that education levels would rise in conflict affected areas. Schooling was effectively paralysed in some of the poorest states where union control was most intense.

The danger of completely alienating unionised teachers and not getting teacher buy-in can be very high. And there is always the danger that a more union-friendly President will come to power, with a mandate to repeal reforms, as happened in the case of Peña Nieto's successor. In 2018, President Andrés Manuel López Obrador was elected with the backing of SNTE and promptly set about undoing many of his predecessor's reforms.

Lessons from Latin America and the literature on reform

How have public education systems improved learning outcomes globally? What works? Clearly, not every country or context is comparable, and so not all lessons will be equally relevant to South Africa's peculiarities. Yet there are clear lessons to be learnt. In Vietnam, sustained political commitment and multiple layers of mutual accountability have led to a strong, high-performing education system. In Brazil, reforms in the early 2000s to equalise funding and protect education opportunities for poorer children, national testing to make information on school results publicly available, and the continued implementation of reforms across successive government administrations led to rapid gains in learning.²¹

Perhaps the most important lesson from international experience of education reform is that change is possible, even in heavily contested environments, but it will only happen if significant pressure for that change emerges amongst concerned citizens who demand that something must be done, whether at a national level, as in Peru's response to their PISA shock, or at a local district or even school level. This is vital for keeping the issue of reform alive, for creating a broad sense of the need for accountability and for countering the influence of those who have vested interests in the status quo. These issues are particularly important in functioning democracies where demands for better schooling can become an issue that sways electoral outcomes.

“Results can be used to mobilise popular support for reform and shape the public conversation about schooling”

The Chilean case points to the importance of creating a broader atmosphere in favour of positive reforms and experimentation. A large body of think tanks and academics pushed the reform narrative in the media, arguing for evidence-based change, which helped to push the government into a number of experiments. Credible, publicly available evaluation results then pointed to improvements in the wake of some of these experiments. With this information, public support for reform and pressure to implement further changes intensified.²² As the 2018 World Bank report *Learning to Realize Education's Promise* asserts, “improving learning metrics is crucial for drawing attention to problems and building the will for action”.²³ Given good data, problems can be pinpointed and thus more easily rectified. Results can also be used to mobilise popular support for reform and shape the public conversation about schooling.

The literature on reform and the experts we consulted all point to the importance of national or regional political leaders who drive education reform campaigns from the highest level. What is important is that the process is

either introduced or endorsed by the President, who needs to be supported by a 'reform team' that understands the importance of strategy and communicates clearly to the public and to teachers what must happen. As many people as possible in government and the ruling party need to be publicly on board with this process. This requires a strong and effective education minister who is committed to reform, willing to make significant changes and supported by a competent likeminded team, who together energise the whole department and indeed PEDs in support of the reform process. The example of Jaime Saavedra in Peru is a case in point.

Experience in Latin America shows that Presidents and ministers who take up the cause of education reform and confront vested interests can push through a vigorous reform programme. In the case of Mexico, it was clearly crucial for Peña Nieto's initial success that he was able to garner significant support because of the media raising education reform as a major electoral issue, forcing the unions to account for poor educational results and placing them on the defensive. A big public outcry was unleashed after a documentary called *De Panzazo* ('Barely Getting By') was released by a political advocacy organisation, which was set up by a business magnate in response to very low PISA scores in 2006. The documentary highlighted union corruption and teacher indifference, putting unions on the back foot against an outraged citizenry. This is a good example of the important strategic role that a company can play in generating support for education reform.

In other instances, unions adopted a consultative approach, thereby ensuring that they have at least some say in various aspects of how the education bureaucracy operates. When that happens unions will have a positive role to play by ensuring that teachers become part of and much more invested in the reform process. This was the case in Chile, where a collaborative partnership between unions and reformers emerged early on. By being part of the process, the *Colegio de Profesores* contributed to a successful, meaningful and entrenched reform process in that country, while also securing teachers' interests.

“Change is possible, even in heavily contested environments, but it will only happen if significant pressure for that change emerges amongst concerned citizens who demand that something must be done”

Successful, sustained reform depends not only on bottom-up but also top-down pressure, and the two feed off each other. It becomes easier to mobilise social groups in favour of reform if they see that there is a champion with the ability to push reforms through, and political leaders are much more likely to be successful in taking on the opponents of reform if a large constituency supports them.

Several luminaries in the field of governance and reform believe that building a wide reform coalition could play a catalytic role in getting reform off the ground. In the context of education, reform expert Professor Brian Levy captures this idea in the slogan 'All for learning and learning for all'. The idea is to get as many interest groups, role-players and stakeholders to push an aligned message on the importance of improving the functioning of a country's education system. As one of the leading global experts on how to deliver reform, Sir Michael Barber, argues: "Reform of a whole system requires a guiding coalition of political, official and donor leaders who share the objectives, a deep understanding of the strategy and participation in the routines that drive delivery."²⁴ This message is echoed by developing country education reform experts Sam Hickey and Naomi Hossain:

Coalitions play a critical role at multiple levels of governance in ensuring the adoption and implementation of reforms aimed at improving learning outcomes. This suggests that support for such coalitions might be the best first step for those seeking to promote institutional reforms. An important constituency here would be business actors, particularly those with requirements for a more highly skilled labour force and which

have sufficient autonomy from ruling coalitions to be able to make demands for reforms around educational upgrading.²⁵

Reformers must heed this essential lesson. With coordination and dedication from a broad range of actors, a single-minded focus on the need for systemwide reform can exert sufficient pressure on government to lead to meaningful change. What is important to recognise is that everyone has a contribution to make. This should spur people to action. Avoiding the issue of education reform, because it seems too intractable, is not an option.

Conclusion: pushing an agenda for change

In the early days of the pandemic, some commentators were suggesting that the Covid-19 crisis may be an opportunity to “reform the educational landscape”, particularly in respect of digital or blended learning.²⁶ Since then, it has become abundantly clear that technological solutions are not a panacea to the severe learning and teaching deficits across the education system. Far more deep-rooted and wide-ranging change is required.

The extent of support for system reform is unknown. There has been no public discussion on using the crisis to fundamentally rethink or reform South Africa's basic education system. Short-term concerns have, somewhat understandably, dominated the discourse, from school reopening debates to school feeding shortfalls. Important work has been done by civil society organisations Equal Education, Section 27, Amnesty International and others to address the immediate challenges facing the education sector. It will not do, however, to use this crisis as a way of avoiding the bigger challenges that beset the education system.

“Coalitions play a critical role at multiple levels of governance in ensuring the adoption and implementation of reforms aimed at improving learning outcomes”

If we want to accelerate learning, then we urgently need to start taking the steps that will shift the system into a higher gear. As a recent World Bank report on cost-effective approaches to improving education quality puts it, systemwide reform is “extremely important” if the goal is “to drive system-wide improvements in learning and make them sustainable over the long term”.²⁷ This will require a broad coalition of civil society, parents, business, media and other actors to demand reforms from the country's political leadership: a movement of ‘All for learning and learning for all’.

Meaningful reforms that address the core issues of corruption, accountability, and the performance of teachers and principals are unlikely to take root without significant political capital being spent. The fact that SADTU forms part of the ruling party's alliance makes this doubly difficult in South Africa. We have to find ways to mobilise – business leaders, individuals, organisations, SGBs, faith-based organisations; everyone. We need more and more South Africans to ‘up the pressure’ and ‘increase the volume’ of citizens telling and pushing the government and all politicians that the quality of education for poorer South Africans has to improve. That is why a national movement calling for systemwide schooling reform to improve learning is so essential. The international experiences and experts point to the importance of electing leaders with a mandate to drive reform. Without that push, reforms are liable to get stuck in the mud.

Getting the reform agenda right is key. The best agenda is one that consists of the kind of changes that will work together to move the system away from its current levels of dysfunction. In Report FIVE we make a case for a

reform agenda that is both targeted at removing the barriers holding back real improvements in learning levels and, we believe, feasible.

Next report

In the fifth and final report in this series, we outline our priorities for action. This is not a blueprint for reform, it is based on our in-depth analysis of what ails our education system (see Reports ONE, TWO and THREE of this series), the views of leading South African experts and the experience of reform in other countries. If supported by a coalition of reformers, we believe the vigorous implementation of this agenda can drastically improve South Africa's poor learning outcomes.

The Silent Crisis

- Report 1: Presents key facts about our uniquely underperforming education system, with a particular focus on our comparative learning failures and the scale of the challenge.
- Report 2: Identifies the root causes of system dysfunction and analyses why we need system reform.
- Report 3: Shows how corruption and cadre deployment by unions undermines the education bureaucracy's ability to deliver learning.
- Report 4: Explores the challenges and opportunities for reform by looking at recent case studies from Latin America and elsewhere.
- Report 5: Summarises CDE findings and set out our priorities for action.

Endnotes

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