

HSRC review

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Human Sciences Research Council

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The **BIG CHANGE**OVER DEBATE:
From the Matric Certificate to the Further
Education and Training Certificate

MESSAGE FROM THE CEO DR MARK ORKIN

The 2003 Institutional Review of the HSRC noted that one of the organisation's social roles is "to conduct research for the benefit of those who cannot pay for it". It emphasised urgent social issues that cut across disciplines and require collaboration for national impact.

The opportunity, and obligation, to conduct such a research project was literally presented on our doorstep in the form of up to two hundred homeless people who had been sleeping under the colonnade of the HSRC frontage in Pretoria every night. Since there were no ablution facilities, this posed a health hazard every night and a cleaning chore every morning. Eventually the Tshwane branch of the Gauteng Health Department ordered the HSRC to fence its perimeter.

To simply construct a fence would only have displaced the problem, and would have been insensitive to the needs of the people concerned. HSRC researchers did a survey among the homeless to establish their circumstances, which helped point to a practical solution: to provide an alternative, safe shelter which provided ablutions and food, located nearby so that the users could reach their daily street-jobs.

With the assistance of community development facilitator, Ishmael Mkhabela of Interfaith Community Development Association (ICDA), a large group of about 20 stakeholders was constituted, including relevant national and government departments, Tshwane Metro, NGOs concerned with homeless people, business representatives, and two representatives of the homeless group. Regular meetings have been held over many months to establish who should be responsible for what, and how to get delivery going.

We learned of a suitable approach, a well-regulated overnight shelter, from the Sisters of Mercy in Johannesburg. Tshwane Metro Housing Department stepped in and provided a large shelter and temporary ablutions in disused premises. They also supplied furnishings



and start-up management, while the Sisters of Mercy donated blankets. Soup kitchens serve a meal to the homeless every night. The HSRC has offered to pay the monthly rates and utilities, and to provide furniture for the administration. The national Department

of Social Development has covered the cost of running expenses for the first year – the remaining challenge is to find sponsors in the future.

The "homeless on our doorstep" were a vivid reminder that every enterprise, public or private, must assume its corporate social responsibilities. But, while the HSRC has been central in supporting the joint achievement of the shelter, we are clear that it is not our job to manage it.

Our core job is to do "social research that makes a difference". We surmise that few South African metro cities have strategies to deal with homelessness. Tshwane's Integrated Community Development Department is developing such a strategy, and an HSRC researcher is assisting. Their challenge is to achieve an adequate institutional arrangement for overnight shelter. More broadly, the impact of the homeless – on urban environment, on investment, on services, on broader society – is out of all proportion to their actual numbers. City improvement and urban renewal must start to incorporate the homeless into their planning and programmes.

The HSRC has therefore commenced a national homelessness study, drawing on our own Parliamentary funds, and conducted jointly by several of our research programmes as well as academic collaborators. The study will cover the social and economic dynamics of homelessness, the life experiences and needs of the homeless, as well as the governmental, financial and organisational challenges of achieving a comprehensive response.

WHO WE ARE

The Human Sciences Research Council (HSRC) is South Africa's statutory research agency dedicated to the social sciences. It has approximately 150 researchers and 100 support staff. Its revenue comes in equal shares from a Parliamentary grant, and from earnings (tenders, commissions and foundation grants).

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WHAT WE DO

The HSRC does "social science research that makes a difference", concerned with all aspects of development and poverty alleviation in South Africa, the region, and in Africa. It undertakes large-scale, policy-relevant, collaborative research primarily for government departments at national, regional and local levels, for other public entities, and for local and international development agencies.

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NEW @ HSRC



DR MIGNONNE BREIER has been appointed as a Chief Research Specialist in the Human Resources Development Research Programme in Cape Town. Before joining the HSRC, she was a Senior Researcher at the Centre for the Study of Higher Education (CSHE).



MS SHARON KLEINTJES has been appointed as a Research Manager in the Social Aspects of HIV/AIDS and Health Research Programme in Cape Town. Before joining the HSRC, she was Deputy Director of Mental Health and Substance Abuse in the Western Cape's provincial Department of Health.



DR ROMILLA MAHARAJ has been appointed as Executive Director in the Office of the CEO in Pretoria, responsible for strategy and planning and for the Council Secretariat. She will also provide leadership

for Corporate Communications, Publishing, Business Development and International Relations. Before joining the HSRC she was Executive Director for Research Development at the Medical Research Council (MRC).



DR XOLELA MANGCU has been appointed as Executive Director of the Social Cohesion and Integration Research Programme in the place of Dr Wilnot James, who has left the HSRC to become Chair of the Immigration Advisory Board. Dr Mangcu was previously Director of the Steve Biko Foundation and Associate Editor of the *Sunday Independent*, and is a prominent public analyst and columnist.



DR ANDILE MJI has been appointed as Senior Research Specialist in the Science, Mathematics and Technology Education Unit within the Assessment Technology and Education Evaluation Research Programme in Pretoria. Before joining the HSRC, he was a Senior Lecturer in the Centre for the Improvement of Mathematics, Science and Technology Education at the University of South Africa.

NewsRoundup

HSRC TO APPOINT NEW CEO FROM AUGUST 2005

The HSRC has started the recruitment process for the appointment of a Chief Executive Officer (CEO) to succeed Dr Mark Orkin, who has decided not to extend his five-year contract, and who will leave the organisation at the end of July 2005.

Professor Jakes Gerwel, Chairman of the HSRC Council, said that nearly a year has been allowed for the recruitment process, including a comprehensive hand-over. "I offered Dr Orkin the opportunity to consider extending his contract, but he declined", Gerwel said. "He has successfully led the transformation of the HSRC in the last four years into a large, vibrant and sustainable organisation. He believes that it is an appropriate time for Council to seek a new CEO, ideally a black research leader."

Dr Orkin was formerly Head of Statistics South Africa, a Professor at the University of the Witwatersrand, and Director of Community Agency for Social Enquiry (CASE). He was a Rhodes Scholar, and has degrees from the universities of Witwatersrand, Oxford and Sussex.

Dr Orkin's current contract runs until the end of July 2005, which will allow sufficient time to appoint a successor and to prepare the successful candidate for taking over the position, Gerwel said.

Orkin said he did not yet have plans for after the end of his term at the HSRC. "I may seek another position in the public-interest knowledge sector. This is an area in which I have experience, and I have found it very worthwhile."

Advocate Bulelani Ngcuka, former National Director of the National Prosecuting Authority, signs the memorandum of understanding, with Professor Cheryl-Ann Potgieter of the HSRC waiting to put her signature to the document

HSRC AND NATIONAL PROSECUTING AUTHORITY SIGN AGREEMENT TO CO-OPERATE

The HSRC and the National Prosecuting Authority (NPA) have signed a memorandum of understanding, providing a framework for co-operation that will benefit both parties. In terms of the memorandum the HSRC will embark on various research projects as commissioned by the NPA. At the signing Advocate Bulelani Ngcuka emphasised the importance of the agreement. The two organisations plan to work together over a number of years.

The memorandum of understanding was facilitated and negotiated by Professor Cheryl-Ann Potgieter, Head of the HSRC's Gender Unit in the Office of the CEO. A task team, headed by Potgieter, has been set up and Dr Kwandiwe Kondlo, Executive Manager and Head of Research and Policy at the NPA, will head the NPA team.

One of the first projects commissioned by the NPA is an evaluation of the Community Courts in the country. Projects, which will be undertaken early in 2005, include an evaluation of the Sexual Offences Courts, and a project on domestic violence. Potgieter has indicated that researchers from inside and outside the HSRC will form part of the research team.



HSRC RESEARCHER APPOINTED TO MINISTERIAL REFERENCE GROUP

Professor Linda Chisholm, Research Director in the Child, Youth and Family Development Research Programme, has been appointed as a member of the Ministerial Reference Group on Gender Equity of the Department of Education.

The Reference Group will support the work of the Ministerial Committee of Gender Equity. Part of its task will be to produce a critical review of progress in the education system since the 1997 Gender in Education Task Team Report. The review will also make recommendations on strengthening the Ministry's work to ensure greater equity in and through education.

HSRC POSTS RECORD GROWTH IN RESEARCH EARNINGS

The Human Sciences Research Council (HSRC) has posted a 69% increase in research earnings over the previous financial year, from R61m to R103m at March 2004.

The earnings are derived from competitive tenders, commissions, and grants from development agencies and foundations and substantially exceed the HSRC's Parliamentary grant of R70m. The annual increases have been a conspicuous feature of the organisation's transformation over the last four years, signifying a seventeen-fold growth from a base of R6m at March 2000.

According to CEO Dr Mark Orkin, the increase in research earnings has enabled the organisation to recruit new researchers, with an emphasis on both senior and black staff "to undo the legacy of a historically

white apartheid institution".

The increased earnings have also allowed the HSRC to expand its research services to users much faster than the Parliamentary grant would have allowed.

During 2003/04, 277 projects were completed, of which the fourteen largest projects contributed 60% of the total external research earnings for the year.

More than 60% of HSRC projects are undertaken in collaboration with outside researchers, spanning institutional or individual research partners in South Africa, the Southern African Developing Countries (SADC), and other African and industrialised countries. Nearly R30m was paid out by the HSRC for such research activities.



Minister Mosibudi Mangena, The Minister of Science and Technology, opens the HSRC's 2003/04 Annual Report launch



LEFT: Fieldworkers busy with surveys for the 2002 Nelson Mandela/HSRC Study of HIV/AIDS

RIGHT: Fieldworkers in training for the survey that would inform the 2004 Nelson Mandela/HSRC Study of HIV/AIDS

MADIBA URGES PEOPLE TO TAKE PART IN HIV/AIDS SURVEY

Fieldwork for the 2004 National HIV/AIDS Survey started on 8 November and 15 000 households in rural and urban areas across South Africa have been randomly selected. The survey includes people of all races and economic standing.

The Nelson Mandela Foundation commissioned the HSRC, in partnership with the Centre for Development, Research and Evaluation (CADRE), the Medical Research Council (MRC), the French Agency for AIDS research (ANRS) and the Swiss Agency for Development and Co-operation (SDC) for both the 2002 and the 2004 survey.

Former President Nelson Mandela has called on all South Africans to take part in the survey, which will help to determine the prevalence of the disease in the country. It will also help identify the social and economic factors related to HIV infection, including an understanding of individual behaviour.

In a statement from the Nelson Mandela Foundation, Mandela described the findings of the 2002 study as a "watershed in our fight against HIV/AIDS".

Before undertaking the 2004 survey, the HSRC met with a number of organisations, including the government, to determine the structure of the survey and the best processes.

"High participation in the study will increase the country's understanding of HIV/AIDS and will enable us to tackle the challenges brought about by the disease", said Dr Olive Shisana, Principal Investigator and Executive Director of the Social Aspects of HIV/AIDS and Health at the HSRC.

"I appeal to all South Africans to participate in this study because if we get the correct information we, as a country, will be able to plan our destiny, our future better. We honestly believe that by allowing members of your household to participate in this study, the information gathered will assist us to develop effective strategies and campaigns to combat the HIV/AIDS epidemic in South Africa", she said.

Shisana gave the assurance that persons participating in the survey will remain completely anonymous. The information will be gathered through undertaking two activities: a questionnaire, which is the primary focus of the study; and a dry blood spot sample. Qualified nurses will administer the questionnaire and they have taken an oath to maintain and protect the confidentiality of all the responses to questionnaires. All samples obtained during the dry blood spots test will be sealed and sent to a laboratory for testing and nurses visiting the households will not know the HIV result of the sample obtained.

South Africa has progressive legislation regarding disability rights and we are unusual in our region in making provision for disability grants. The rights of disabled people are constitutionally enshrined and disability is a recognised category within employment equity legislation.

In the past things were different. Disability was seen as a medical issue. It was assumed that the degree of bodily impairment determined how disabled a person was, and that the core of disability research was to cure or alleviate bodily impairments. Care for disabled people was narrowly defined as nursing or medical care and was linked, by extension, to religious care. Working with the disabled was



NOT WITHOUT US

By Leslie Swartz

the challenges in researching disability

charitable, undertaken by people who through their convictions or their professional training, were merciful enough to work with the “afflicted”.

Though much good has been done through the interest of medicine and religion, there has been a dramatic world-wide change in perspective. Disability work is now seen, fundamentally, as addressing issues of social exclusion, and promoting access for all citizens to full participation in society – including work, recreation, creative pursuits, and the health and justice systems.

A key slogan of the disability movement internationally is “Nothing about us without us” – a slogan which has been taken up by Disabled People South Africa. This slogan, in keeping with the doctrine of self-representation for disabled people, is an important counter-balance to earlier paternalistic beliefs that “experts” knew what was good for disabled people.

This approach links clearly to issues in feminist, black and gay studies, all of which emphasise self-representation by women, black and gay people respectively, in their own research agendas. There are, however, divergent interpretations of what “Nothing about us without us” implies for disability research in practice.

At one end of the spectrum, there are those who say that the only legitimate disability research is that in which disabled people themselves ask the questions, conceptualise

and conduct the research, and interpret and disseminate the results. At the other, more cynical end, some feel that a token nod to disabled peoples’ views at some point in the research process is sufficient.

Navigating the complexities of producing disability research that is both credible and policy-relevant is not easy. But it is also very exciting. Some key principles are helpful here:

► **Consultation.** Even when disabled people themselves do not primarily define a research issue, it is important to have a credible consultation process with representatives from the disabled community. The disability sector in South Africa is well organised and experienced at providing constructive and invaluable feedback.

► **Participation and leadership.** Wherever possible, disabled people should have meaningful roles in research concerning disability. Research leadership by disabled people should be a goal.

► **Capacity-building and workforce diversity.** We face major challenges in the developing cadres of disabled researchers, of whom there is a shortage. This relates partly to “downstream issues”. Many competent disabled people in South Africa have been denied access to adequate education, even at school. A good example is that of a colleague who had a keen interest in electronics, but was advised at school that, since he was blind, he could not study mathematics. This colleague has now excelled in an area of the humanities, but

South Africa has lost the potential contribution to the “hard” sciences of a person who had both the interest and aptitude to study further in this area. There are many people of talent who have been denied any hope of tertiary education, let alone specialist research careers. Stereotypes still abound, such as the idea that blind people should become telephonists, wheelchair users should become call-centre operators, and that deaf people should become stock controllers. We have a long way to go before it is universally accepted that it is not the disability which should determine a person’s career path, but the person’s talents and abilities.

An interesting feature of disability research is that it can combine fascinating technical questions (such as the design of computer software to increase disabled people’s access to print and other media) with questions about how to change social attitudes (such as how to assist companies and departments to develop an integrated, skills-based workforce).

It is important for researchers, and for all concerned with building a cohesive society, to realise that research which brings us closer to the goal of what is called, a “barrier-free society” in disability literature, is not only necessary for our social role, but is also very intellectually stimulating. •

Professor Leslie Swartz is a Research Director at the Child, Youth, and Family Development Research Programme, which has as one of its foci the area of Disability Studies.

FARMING TOGETHER

the triumphs and failures of joint farming ventures

By Simphiwe Mini and Rendani Randela

How have joint venture schemes helped farm workers and other beneficiaries to enter commercial agriculture and improve their livelihoods? Who initiates these schemes, who benefits from them, and who makes the decisions?

These are some of the questions addressed by a new research report entitled *Joint Venture Schemes: KwaZulu-Natal, Western Cape, Mpumalanga, Eastern Cape*, compiled by the HSRC and the Surplus People's Project.

The report looks at four main types of joint venture schemes:

- ▶ Share-equity schemes without land transfer
- ▶ Share-equity schemes involving land transfer
- ▶ Joint-venture schemes on municipal commonage
- ▶ Contract farming.

Most share equity schemes are found in the fruit and wine farming industries, but a range of other enterprises, including vegetables, olives, cut flowers, dairy and eco-tourism also boast such schemes.

"All commercial farmers in this country have prospered as a result of the hard work and positive contributions of many reliable people in their employ" – Estate Manager, Cape Olive share equity scheme

Commercial farmers generally initiate the first type of joint venture scheme, and share equity without transferring land. In these business ventures the farm workers' share is financed through land reform subsidies. In order to participate in the scheme farm workers have to develop a constitution and establish a legal entity.

In most cases the farmer appoints a service

provider to do the work, which is paid for by the land reform grants. This raises questions about the accountability of service providers.

The policy on share equity schemes does not provide clear guidelines on the kind of pre-settlement support that beneficiaries should receive. Farm workers are often not fully aware of the options available to them and their implications, and of the legal complexities of trusts and partnership agreements. Service providers and/or farmers usually provide training on these matters.

In the second kind of scheme, share equity with land transfer, farm workers use their land reform grants to buy part of the farm on which they are employed, or part of a neighbouring farm. In other cases beneficiaries get land through a restitution process, or through a transfer of state land, and then enter into an agreement with the previous owner or a neighbouring farmer.

In general, these schemes have the same problems as equity-share schemes without land transfer, except that they are more varied and

complex in design. This increases the difficulties facing farm workers in understanding the rights and obligations of the parties. A major difference is that the land transfer gives the beneficiaries greater security, especially in the case of business failure. Land transfer is rare, however, in areas with high-value agricultural land, such as wine and fruit farming areas.

In both kinds of share-equity schemes



membership is usually voluntary. In some cases, though, farmers set criteria for joining the scheme. Farm workers who do not join may face uncertainty about their continued role on the farm. Members of these schemes are predominantly male, reflecting the structure of farm-worker households.

Motives given by farmers for setting up share-equity schemes include a mix of commercial and humanitarian reasons. They emphasise poverty alleviation and food production through giving farm workers access to good quality land. Land transfer schemes also contribute to land reform objectives. Other motives include increasing workforce commitment and performance through participation in decision-making, reducing labour costs, improving market access (particularly in international markets) and moral and socio-political considerations.

Farm workers, on the other hand, see share-equity schemes as a way of improving their standards of living and securing their jobs and homes on the farm. But wages have generally remained the same, and many schemes have not paid dividends because of low performance, or for other reasons.



Above: KwaZulu-Natal Province, Harburg, 06 September 2003. Small-scale sugar cane farmer Hlohlokwake Masangu in his sugar cane field next to his house at a communal area bordering the sugar plantation of Heinz Witte. Witte and other commercial cane farmers in the area help these small growers with know-how and machinery. (Photo: Henner Frankenfeld / PictureNET Africa)

The economic performance of share-equity schemes has been varied, with some on the verge of collapse, or struggling, while others are doing well. This shows that joint ventures expose workers to market forces and business risks.

Farmers see share-equity schemes benefiting labour relations through a sense of ownership and greater commitment. But in most cases farmers continue to make management decisions and workers see labour relations as being much the same, except for those who have been given new titles or management positions. The limited financial benefits can also lead to tension and conflict. While some schemes have led to increased employment, this is not always the case.

Although they are shareholders and in some cases landowners, many farm workers still find that differences in capacities, skills, expertise, knowledge and insights mean that their relationship with the farmer remains unequal. The situation becomes more difficult

when farmers themselves rely on consultants to make decisions about, for example, international markets.

A key element here is the constraint placed on farm workers' participation by their lack of access to education and training. Although this problem can be addressed, only a few of the present generation of farm workers can be trained to the level where they can participate effectively in complex business decisions.

Some schemes fail because of the long delays in setting them up and in accessing finance. These delays lead to a deterioration in the farming infrastructure and require considerable investment to get production going again, landing shareholders with a heavy debt burden. Share-equity schemes involving financial institutions and development agencies linked to government, such as the Industrial Development Corporation (IDC), Development Bank of Southern Africa (DBSA) and others, have been more successful than those that have relied on private commercial

banks. Allowing commercial banks to administer land reform grant finance might enable them to play a more positive role.

The third type of scheme, municipal commonage, does not transfer land but provides access to municipal commonage for agricultural use. The designs and institutional structures of schemes in different localities are varied. In some cases, municipalities have helped to draw in financial institutions and development agencies with positive effects. In others, local people have come together and approached the municipality to secure land for group production. In general, the latter have had less public or private sector involvement.

These schemes have played a positive role in providing people with income and increasing employment, but not all municipalities have the capacity to initiate and run them, and some do not have commonage with which to start such schemes.

Contract farming, the fourth type of scheme investigated, is an agreement between a farmer who contracts to produce a specific crop in certain quantities and to quality standards, and a processor or marketer who undertakes to provide support and buy the crop.

In South Africa contract farming is most common in sugar cane production in communal areas, but it is also found in timber and chicken production. Corporations or companies usually start contract farming with the aim of limiting their involvement in the less profitable stages of production. Contract farmers receive a number of important benefits, including market access and credit and extension services, but they have little power to determine the terms of the contract. Tight profit margins can lead to the exploitation of family labour.

Joint venture schemes offer an important means for beneficiaries to enter into commercial agriculture and for commercial farmers to play a role in promoting this. But unequal power relations and limited access to resources and education can cause relationships between commercial farmers and potential beneficiaries to remain exploitative.

Government can play a more active role in promoting the interests of previously disadvantaged farm workers by becoming more involved in initiating projects, setting clear guidelines, providing timely access to funding and other resources and monitoring their use.

Professor Simphiwe Mini is a Chief Research Specialist and Mr Rendani Randela is a Chief Researcher in the Integrated Rural and Regional Development Research Programme.

Less than 40% of learners who enrolled for Grade 1 in 1991 reached Grade 12 in 2002. And only 13.7% of those who make it to matric, proceed to higher education. These are two of the startling findings in two papers presented to a colloquium at which policy-makers, implementers, the HSRC and university-based researchers presented their current research on the matric year.

But who makes it in matric? Papers by Ms Helen Perry and Professor Brahm Fleisch (School of Education, University of the Witwatersrand), and Professor Michael Kahn (HSRC), used 2002 datasets and found that although girls' enrolment and participation in schooling and matric is higher than for boys, African girls in particular perform less well than boys. But white, Indian and coloured girls outperform boys at the higher levels in all subjects.

But whose purposes is it serving? Presentations by Professor Cheryl Foxcroft (Department of Psychology, University of Port Elizabeth) and Professor Nan Yeld (Business Centre for Higher Education Development, University of Cape Town), questioned the predictive validity of the examination and suggested that matric is no longer serving the selection function for higher education that it did in the past. This raised big questions for the imminent Further and Education Training Certificate (FETC), which will replace the Matric Certificate in 2008.

A paper by Ms Peliwe Lolwane from Umalusi placed the debate within a sobering historical context. The annual drama around matric, she shows, would be familiar to our grandmothers. She shows that many of the challenges that currently confront Umalusi in establishing and maintaining standards have

changing the nature of the examination. "We are the only country in Anglophone Africa," she remarked, "that did not hang onto the Cambridge exam and developed our own".

Her paper drew attention to the silent and invisible changes that shape the school-leaving examination, its ongoing evolution in the context of history and the inevitable changes and continuities that will mark its further development into the FETC.

A number of papers highlighted issues that require attention if the FETC is to enjoy public confidence and credibility. Ms Matseleng Allais of the South African Institute for Distance Education (SAIDE), pointed to the confusing policy and institutional environment created by the NQF, as well as the potential challenge posed for examiners in assessing outcomes that have very little content.

Mr Morgan Naidoo, Department of Education, KwaZulu-Natal, and Professor

MARKING MATRIC: Overview of the Debate

As Kahn put it in the discussion, "we have information that shows that girls can and do outperform boys on even the hard subjects, but we do not know what the drivers of under-performance amongst African girls in poor communities are."

His paper shows that "this phenomenon is not random, but clearly systematic" across the years for which he had conducted his analysis. Such analyses have only become possible very recently, when earlier scruples about the collection of statistics on a racial basis disappeared and they once again became routine.

Matric has a decisive influence on the fates of those who do make it to matric – depending on whether they do Higher or Standard Grade and whether they achieve an exemption or not. Research by Umalusi, the quality assurer in the General and Further Education and Training bands of the National Qualifications Framework (NQF), confirmed the suspicion at the end of 2003 that the majority of students are now sitting for Standard Grade examinations, and writing examination papers whose quality has varied and in some cases declined over time.

historical precedents in the history and influence of the Joint Matriculation Board (JMB) from 1918–1992 and of the South African Certification Council (SAFCERT) from 1992–2002.

Over the course of the twentieth century, the JMB established a process of setting and maintaining standards that included statistical standardisation processes from the 1960s. Its successor, SAFCERT, was established as a response to the education upheavals of 1976. Through it, the JMB also drove the centralisation of the standards control function, having unsuccessfully attempted a decentralised provincial model. Universities' participation in SAFCERT declined in this period. Statistical standardisation procedures were adjusted in such a manner as to support the view that homelands were working. Norms were defined, as they had been all along, according to the racial departments.

Since 1994, the terrain in which the matric examination has operated has changed substantially. Lolwane documents the curricular changes and how they began "percolating upward to the matric syllabi", influencing and



By Linda Chisholm

Matric is no longer serving the selection function for higher education that it did in the past

Johan Muller, School of Education at UCT, both questioned the potential elimination of differentiation within the examination altogether when the Higher and Standard Grade are dissolved and called for sensible and clear forms of grading and benchmarking.

Dr Mbithi wa Kivilu of the HSRC provided a salutary warning that if anyone was hoping that the FETC might solve the standards question, they might need to think again. For if there is one thing on which there is conclusive evidence in the literature, it is that, even within an outcomes-based understanding of standards, there is no one model standard. Ultimately, his paper showed, deciding on a standard is a matter of judgement and not of numbers and statistics.

Papers at the colloquium ranged from those that discussed policy issues relating to the matric and the move to the FETC, to those that analysed emerging trends in matric results and those that questioned the nature and purpose of matric. The papers provoked vigorous but constructive debate over its gate-keeping role, the reliability of the results, whether standards are falling or not, how reliable the matric is as a measuring tool, what in-depth analysis of the matric results over time shows us and whether and how the FETC will improve it or not. Underlying all this was a frank, critical discussion about outcomes-based education and its implications for assessment at the Grade 12 exit level. •

Professor Linda Chisholm is a Director in the Child, Youth and Family Development Research Programme.

MARKING MATRIC: the project

By Vijay Reddy

In January 2004, following the heated discussions about matric performance, education specialists at the HSRC came to the conclusion that the essence of the debate was whether the increased performance rate meant that the education system was improving, or not. And so a Matric Project was born. The purpose of this project was to, on an empirical basis, deepen the discussion around the matric examination and quality of the educational system.

The Matric Project has brought together research from five HSRC Research Programmes: Assessment Technology and Education Evaluation (the project home); Child, Youth and Family Development; Human Resource Development; Knowledge Management; and Surveys, Analyses, Modelling and Mapping.

We knew that a number of researchers were already working on the different questions about the matric. We saw it as timely to bring the work together through a colloquium. Of course, the question was asked, “why matric, as matric exams will be phased out in 2008 to make room for the Further Education and Training Certificate (FETC)?”. Our response was that educational quality and a school-leaving examination would still be relevant in the new structure.

A colloquium, Marking Matric, was held in early November 2004 at the HSRC. The colloquium included participants from the National and Provincial Departments of Education, Umalusi, the HSRC and university researchers. Seventeen papers on different aspects of matric were offered.

The discussions were enlightening, lively and robust but not divisive. We recognised that participants came from different types of organisations with different responsibilities: some responsible for policies to ensure the delivery of quality education; some responsible for the implementation of policy while others had the luxury of criticising the system without the responsibility of managing it. But all participants recognised the importance of a collaborative, critical engagement to raise the relevant issues around the matric.

The papers from the Colloquium are being edited and published in a book: *Marking Matric: Proceedings of the HSRC Colloquium*, edited by Linda Chisholm and Vijay Reddy. This collection will be available at the end of February 2005. We hope that this collection contributes to deepening the discussion around quality of the educational system and the school-leaving certificate. •

Dr Vijay Reddy is a Director in the Assessment Technology and Education Evaluation Research Programme.



MAKING SENSE OF MATRIC PASS RATES

By Anil Kanjee



The matric pass rate is seen as an important benchmark to measure learners' performance and the standard of education in the country. But can the pass rate actually tell us that? With some modifications to the current matric examination system it is possible to draw accurate conclusions about the pass rate, performance and educational standards.

In the last five years, the pass rate in the matric (Grade 12) examination has increased significantly. In his press announcement of the 2003 matric exam results, the Minister of Education noted that since 1999, the national matric pass rate improved by 24,4%. Increases in 2003 pass rates were also recorded in all nine provinces.

Credit for the steady improvement in the pass rate was rightly claimed by the provincial and national Education Departments who saw it as a direct result of their targeted intervention strategies to break the "cycle of underperformance". It signalled an improvement in the overall education system and indicated that the new government was succeeding in their efforts to provide quality education that addressed the needs of all South Africans.

But the increase in the matric pass rate also drew other comments. To some, it signalled that the examination papers were becoming "easier". To others, the increased pass rate

was merely a result of: holding back Grade 11 learners who weren't adequately prepared; requiring learners to take more subjects at the Standard Grade; lower cut-off scores that are used to make pass or fail decisions; and of greater leniency in the marking procedures.

What then is the practical significance of the pass rate? What does it tell us about our education system? What do our learners know? What can they do? How can learner performance be increased?

The current format of the matric examination dates back to 1996, when the 18 apartheid-based education departments were merged into a single national education ministry. This meant the opening of all schools to all races, a new curriculum and new policies.

The nine provincial departments were given full responsibility for the matric examination, with the national Department of Education setting the "norms and standards" and Umalusi (formerly known as the South African Certification Council) maintaining quality control. This meant that learners in the nine provinces all wrote nine different examinations for each of the subject areas offered.

In 2001, the first set of common national papers was administered in Mathematics, English Second Language, Physics, Accounting, and Biology, with History added in 2003. Learners in the nine provinces have

thus since been writing the same examination paper in each of these five subject areas. In addition, the use of the year mark for calculating the final grade of learners was also introduced. This comprised an aggregate of scores obtained through classroom tests, homework, practical work and assignments.

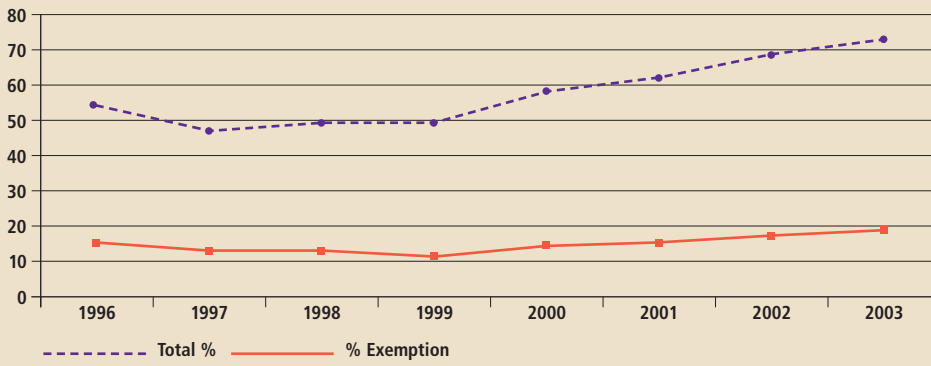
Teachers with subject area expertise and experience, mark the papers at provincial level. Umalusi moderates the question papers and the marking of the examination papers. It also standardises the marks of learners in accordance with agreed statistical principles. This process is aimed at ensuring that learners of equal ability, who write different examination papers under different circumstances, will obtain equivalent results.

The practice of comparing the matric results continues: firstly, across different years to trace increases or decreases in pass rates, and secondly, between the provinces to determine which province recorded the highest or lowest increase or decrease in pass rates.

But I contend that one cannot compare pass rates across different years as this would entail comparing two different sets of learners and two different sets of examination papers – which leaves one with no common elements to compare. Even more disturbing, is the trend among researchers and academics to compare matric results from 1996 to 2003 (Figure 1) without taking into account that before 2001, no year marks were used in determining the final matric scores for any learner.

What is needed is to find a common base from which to compare – in this case it can only be the examination papers. I propose the use of a matrix sampling method, where an unusually large set of questions is administered to a large group of learners with different learners taking different sets of questions. As shown in Figure 2, learners A to E take questions q1 to q5 and questions q11 to q15

Figure 1: National trend in matric pass rates and exemptions: 1996 to 2003



while learners F to J take questions q1 to q10.

This means that, for example, if we need 200 questions to cover the entire matric mathematics curriculum, we can administer as few as 20 different sets of questions to 10 different learners and still obtain reliable, valid and relevant information on how learners performed in the different sections of the curriculum. (In practice, the number of learners would, of course, be very much greater than 10, more in the order of 1000s.)

The Learner Achievement Monitoring Project (LAMP) is a classical example of this method. For this project, the HSRC developed 315 questions, requiring a total administration time of 1 080 minutes, to assess learner performance on the entire Grade 9 Mathematics, Science and English curricula.

Because it is impractical to administer all 315 questions to any single learner, these questions were organised into several booklets and then administered to different sets of learners.

It is crucial to note here that, firstly, different sets of learners take different questions, and secondly, that each individual learner takes some questions that are common to other learners – thus providing some common basis for comparison.

This means that, in a reasonable time and without jeopardising the reliability and validity of the test questions, one can obtain scores that are comparable for all learners. This can be done even if different sets of questions were taken at different times (e.g. across 3 to 4 years).

The disadvantages are that analysis of the papers can only be done using specialised software and that large samples are required to obtain valid and reliable results. However, all these challenges can be addressed given the availability of relevant resources as well as the experience and expertise at the HSRC.

Of course, the implementation of any such system should be done with extreme caution

to ensure that no learner is adversely affected. Any revision of the current system should be thoroughly studied and tested before large-scale implementation is done. This requires a process through which this very result is guaranteed.

The introduction of a South African Matric Monitoring and Intervention (SAMMI) system provides such a process. The idea is to integrate the matrix sampling design into each examination paper without affecting the performance of the learners. I propose that each paper will now contain an additional 20 to 30 questions, requiring approximately 40 minutes' additional testing time.

The learners should not be able to tell the difference between their "usual" questions and the "SAMMI" questions used for monitoring. The marking process should also be extended to accommodate the SAMMI system.

For the system to be successful it is crucial that the monitoring questions should not be disclosed and the current practice of releasing all examination questions after the examination will need to be revised. The effect of changing the structure, form and content of the examination paper on learner performance still needs additional investigation before any final decisions are taken. I therefore propose that several pilot studies be conducted in two or three provinces during the matric trial examinations.

SAMMI offers several practical advantages. It could include diagnostic items to identify common errors, which can be used in the development of relevant intervention strategies. Also, if a large enough pool of items exists in a subject area, a percentage of the items can be used to compile support material for the teachers to use in assessing their learners during preparation for the matric exams.

Most importantly, this approach provides the ideal opportunity to monitor trends in the matric pass rate. In particular, this model provides relevant information about what our learners know, what they can do, which areas of the curriculum they are struggling with, and whether the standard of the matric examination papers is dropping. •

Dr Anil Kanjee is Executive Director of the Assessment Technology and Education Evaluation Research Programme. This article is based on a paper delivered at the Marking Matric Colloquium, and will be included in a book.

Figure 2: Example of a matrix sampling design

Item No/Learner	q1	q2	q3	q4	q5	q6	q7	q8	q9	q10	q11	q12	q13	q14	q15
A	x	x	x	x	x						x	x	x	x	x
B	x	x	x	x	x						x	x	x	x	x
C	x	x	x	x	x						x	x	x	x	x
D	x	x	x	x	x						x	x	x	x	x
E	x	x	x	x	x						x	x	x	x	x
F	x	x	x	x	x	x	x	x	x	x					
G	x	x	x	x	x	x	x	x	x	x					
H	x	x	x	x	x	x	x	x	x	x					
I	x	x	x	x	x	x	x	x	x	x					
J	x	x	x	x	x	x	x	x	x	x					
K						x	x	x	x	x	x	x	x	x	x
L						x	x	x	x	x	x	x	x	x	x
M						x	x	x	x	x	x	x	x	x	x
N						x	x	x	x	x	x	x	x	x	x
O						x	x	x	x	x	x	x	x	x	x

SOUTH AFRICA AND NIGERIA: Getting closer all the time

By Jessica Lutchman, John Daniel and Sanusha Naidu

"Like wildfire tearing through a dry forest, South Africa is rapidly entrenching itself in every facet of the Nigerian economy: from construction, energy, aviation, entertainment to revenue collection, South African companies loom large and are still growing."

Aminu Mohammed, *Weekly Trust*, Nigeria,
13 September 2003.

The end of apartheid opened up the African economy to South African capital. Isolated from that market for decades because of sanctions and its "polecat" status, South Africa was freed to exploit huge new investment opportunities in a stagnating continental economy. The speed and extent of the capital inflow into Africa has been impressive.

In 1991, Africa's share of South Africa's global export trade was 4%. By 2003 it had risen to 16.48%, overtaking that of the Americas and making Africa South Africa's third-largest export market (behind the European Union and Asia). The republic has also become the largest source of new foreign direct investment in the rest of Africa. South



Above: A giant poster of MTN adorns a building in Lagos, the commercial nerve centre of Nigeria August 8, 2002. REUTERS/George Esiri GE/CLH/NIGERIA TELECOMS LAGOS Photo by GEORGE ESIRI.

In the four-year period from 1999-2002, there was an approximate 540% increase in South Africa's exports to Nigeria

African businesses have actively entrenched themselves in sectors such as mining, financial services, retail, telecommunications and aviation across the continent.

Besides sector involvement, nascent bilateral relations between South Africa and other African countries have also become an important component in South Africa's growing involvement in the rest of Africa.

Of particular interest and significance has

been the flourishing of relations between South Africa and Nigeria. Politically, both countries are the dominant state entities in their respective sub-regions. They also both have a history of co-operation with and involvement in a range of continental projects, like the New Partnership for Africa's Development (Nepad), and both countries are led by presidents with a record of involvement in international and regional ventures.

Between the two there is also an economic synergy born from the fact that South Africa is Africa's largest economy, and Nigeria its biggest consumer market.

The boom in trade between the two countries stems from a 1999 bilateral trade agreement and the inauguration in 2002 of a Binational Commission. The Commission has facilitated co-operation between the two countries in areas such as defence and security, science and technology and education and culture. It has also reduced obstacles to trade with agreements on taxation and the protection of investments. It meets twice a year and is

chaired at Deputy President level.

The benefits flowing from these arrangements can be seen in the fact that in the four-year period from 1999–2002, there was an approximate 540% increase in South Africa’s exports to Nigeria. In 2003, two-way trade flows between SA and Nigeria amounted to R5,3 billion. Of that, South Africa’s exports were valued at R2,3 billion while its import share, 98.4% of which is oil, amounted to R2,7 billion.

As of mid-April 2003, an estimated 55 South African companies were doing business in Nigeria (Table 1 below). The single largest investor is MTN. Its entrance into the Nigerian market came by way of the first telecommunications auctions process in Africa in January 2001, when it was awarded one of Nigeria’s Global Systems Mobile licences for a fee of US\$ 285m. At the time, MTN’s entrance into the Nigerian market was the company’s single biggest investment outside of South Africa, and by the end of 2003 it had spent more than

By contrast, the Nigerian business profile in South Africa is modest and shrinking, given the sad demise of its most public investment in the form of *ThisDay* newspaper

off Lagos harbour, which is being spearheaded by Game, Shoprite, V&A Waterfront, and JHI Real Estate.

A second is the development of the Tinapa business and tourism resort in the Cross River State of Calabar. Standard Bank, Protea Hotels, Shoprite Checkers, Southern Sun, and the Industrial Development Corporation are the major stakeholders in this project.

Yet, while some companies are thriving in the Nigerian market, a handful have faltered. Vodacom recently closed its Nigerian operation when it was accused of using corrupt measures in its attempt to enter the market through a joint venture with the local cellular phone company, Econet Wireless Nigeria (EWN). South African Airways’ (SAAs’) bid for the national airline failed when the Nigerian government shifted position and reneged on an agreement with SAA and opted

Training companies, particularly in the area of IT, get a lot of business from Nigerians and there are thousands of Nigerians working in a wide range of fields such as academia, human resources, property, accounting and the medical field.”

And, then of course, there is the whole arena of organised crime and other illicit activities in which it is popularly perceived that significant numbers of Nigerians are involved.

Finally, what future is there for the Nigerian-South African relationship? On the political side, conditions for a closer strategic alliance are favourable. On the economic side, while Nigeria currently enjoys a positive trade balance with South Africa, the relationship is unequal and favours South Africa.

Nigeria’s trade link with South Africa is based almost entirely on oil, whereas South Africa’s trade is diverse and includes a range of products that Nigeria’s massive consumer market clearly wants. It is our view that, provided the Nigerian state holds firm and does not fragment in the face of sectarian violence, South Africa’s trade in the Nigerian market can only grow.

The opposite does not apply because, apart from oil, Nigeria has little or nothing to offer to the South African consumer. The inequality in the relationship will, therefore, grow and ultimately the trade balance will turn in South Africa’s favour. As the Chief Executive Officer of Vodacom noted in June 2004, “Nigeria is very important. It’s the second-most important economy in Africa and it’s very difficult not to be in Nigeria” (*Business Day*, 8 June, 2004). An increasing number of South African businesses are recognising that fact and, as they enter that market, the gap between Africa’s largest and second-largest economies will widen. •

Ms Jessica Lutchman is a Researcher and Professor John Daniel a Director in the Democracy and Governance Research Programme. Ms Sanusha Naidu is a Research Specialist in the Integrated Rural and Regional Development Research Programme.

This article is based on the chapter “South Africa and Nigeria: Two unequal centres in a Periphery” in State of the Nation: South Africa 2004-2005, published in November 2004. For information on how to order the book, see the back page.

Table 1: SA companies in Nigeria and Nigerian companies in SA	
SA companies in Nigeria	Nigerian companies in SA
MTN, Eskom, Stanbic, Stanlib, JHI Properties, Nu Metro, Game, Shoprite Checkers, Multichoice, Spornet, Woolworths, PetroSA, Umgeni Water, V&A Waterfront, Arivia.kom, Sasol, ACSA, IDC, Rand Merchant Bank, Johnnic Business Day, Grinaker LTA, Group 5, Murray & Roberts, Nampak, SABMiller, Broll, Famous Brands, St. Elmos, Aberdare, Transtel, Global resorts, Protea, Southern Sun, Fleet Africa	ThisDay Newspaper, FS African Standard, Union Bank, First Bank, Philips Consulting
<i>Constructed from the HSRC Corporate Mapping Database</i>	

US\$ 1 billion in infrastructural and other start-up costs in Nigeria. By then, its number of subscribers had topped the one million mark. Towards the end of 2004, its subscriber base has grown to 1.97 million. In 2003-04, MTN recorded an after-tax profit (ATP) from its Nigerian operation of R2.4 billion, representing 55.8% of its total profit from its non-South African ventures.

MTN’s success in Nigeria has sparked multi-million rand projects by a cluster of South African investors. One involves the waterfront development and rehabilitation of the Bar Beach area of Victoria Island, just

for Virgin Atlantic as a joint-venture partner with its national carrier.

By contrast, the Nigerian business profile in South Africa is modest and shrinking, given the sad demise of its most public investment in the form of *ThisDay* newspaper. However, according to Dianna Games, Managing Editor of the *SA Journal of International Affairs*, this paucity of companies only “masks the vibrant business relationship that Nigeria has with South Africa”. For example, she says, “Many Nigerian entrepreneurs have invested millions of rands in South Africa and source products from the country.

CONFRONTING THE DIVIDE: Attitudes to inequality

By Ben Roberts

The extent to which South Africa's political and economic transformation has benefited the previously disadvantaged is subject to much debate. As one of the world's most inequitable societies, increasing attention has been devoted to measuring changes in South Africans' incomes and income inequality over the first decade of democracy.

Empirical evidence suggests that poverty may have increased, despite a resolute commitment by the government to address pervasive poverty and inequality, and the policy responses adopted to this end over the decade. Overall, inequality may also be stagnating due to the combined effects of worsening intra-racial inequality and only a marginal decline in inter-racial inequality.

The HSRC's 2003 South African Social Attitudes Survey (SASAS) contained a set of measures for exploring attitudes to inequality in a fairly direct manner. The results provide some insight into South Africans' attitudes towards the changed circumstances borne by the post-apartheid period.

The statement, "in South Africa incomes are too unequal", elicited responses reflecting a high level of dissatisfaction with the perceived level of income inequality in the country. An estimated 87% of respondents "strongly agreed" or "agreed" that incomes are too unequal. South Africans therefore appear to be generally intolerant of the level of inequality in the country.

This situation is felt more acutely by black Africans than by white respondents. And those identifying themselves as being vulnerable or "just getting by" are significantly more likely to express an aversion to income inequality than those that consider themselves "poor", or "better off".

There are a number of possible explanations for these negative views on inequality.

Attitudinal differences to inequality are certainly likely to reflect the enduring apartheid legacy of pronounced income and wealth inequality. But this negative attitude could also be attributed to a perceived growth in social inequalities over the decade, a sense of personal material loss for certain respondents – especially due to rising unemployment, and a perception that the post-apartheid transformation process has been unfair.

That those that are "just getting by" express the highest level of aversion to inequality is not altogether surprising. The kind of market reforms and trade liberalisation that South Africa has embarked on under the Growth,

Responses reflected a high level of dissatisfaction with the perceived level of income inequality

Employment and Redistribution (GEAR) macro-economic strategy have been shown to not only create opportunities, but also new vulnerabilities, especially for the near poor or middle strata.

One would expect that the low levels of tolerance of inequality in society would produce an equally strong desire for governmental redistribution. And this appears to be the case, with 90% of respondents believing that government should take more responsibility to ensure that everyone is provided for. Compared with other countries, this result is exceptionally high when related to the perceived aversion to inequality. While dissatisfaction with the level of income inequality in South Africa approximates that in more developed countries such as Great Britain, and is somewhat lower than that in Central and Eastern European countries, South Africans express the highest levels of agreement with regard to government's responsibility for social justice.

Despite the uniformly strong sentiment favouring the role of the state in meeting the inequality challenge, there appears to be less agreement on the preferred means of achieving these gains. While 90% of respondents believe that government has a responsibility to provide employment, only 66% believe that there should be preferential hiring and promotion of black South Africans.

This may be ascribed to the fact that most population groups support government-driven employment creation, ranging from 92% of Africans to 79% of Indians, but affirmative action receives mass support only from Africans. Among the other population groups, the level of support for such reform is less than half the national average.

There is even less support for black economic empowerment, with only 60% believing government should provide preferential contracts and tax breaks to black businesses. Attitudes to land reform reveal a similar trend, with sizeable support from black African respondents relative to other population groups. Relative to the "better off" group, those classifying themselves as "poor" generally express a more favourable attitude towards redistribution.

What are the possible reasons for this paradox: widespread aversion to inequality

and yet polarised levels of support for different forms of redistributive measures along race and class lines? One feasible explanation may be self-interest among South Africa's elites. Their concern about the income disparity in the country might stem from the perception that inequality breeds crime and poses a threat to property rights. Social consciousness among elites could also explain their concern about the economic divide, but research suggests that such social solidarity is poorly developed among most elites in South Africa – a situation complicated by the geographical, social, educational, economic, and psychological distances between elites and the impoverished masses.

Resistance to redistributive policies may arise from the fact that, unlike the poor, many elites have not benefited directly from such interventions. Poor delivery, corruption, nepotism and possibly a fear of a Zimbabwean-style redistribution of assets may also have tainted the redistribution process.

Understanding social attitudes may help policy-makers assess and navigate their political economy contexts in designing social policies for a fiscally sustainable social contract. The observed attitudinal differences with regard to the government's role in service provision and addressing inequality is significant. They may be particularly relevant to levels of political support for redistribution

or other types of public assistance.

Differences in attitudes about redistribution yield insights into which social policies are likely to be successful and politically sustainable in a particular context. Dismissing or ignoring public attitudes is likely to result in unsustainable programmes. Strategies for implementing reform must attempt to navigate the constraints posed by such attitudes,

and to recognise windows of opportunity.

The debate about redistribution in South Africa cannot be deferred any longer. Since we are one of the world's most unequal societies, redistribution on a far greater scale than has been attempted to date is required if the twin challenges of poverty and inequality are to be surmounted. Based on the SASAS results, it seems fairly certain that such redistributive efforts, if attempted, will be resisted. Government therefore needs to find innovative ways of minimising resistance to redistribution while improving the targeting of social spending and the gains from growth towards the lower end of the distribution. •

By Population Group, percentage that "agree" or "strongly agree" that...

BY RACE	SOUTH AFRICA	BLACK	COLOURED	INDIAN	WHITE
'In South Africa incomes are too unequal'	87	88	79	94	82
'Government should take more responsibility to ensure that everyone is provided for'	90	92	88	85	84
'Government's duty is to provide employment'	90	92	87	79	83
'Government should ... redistribute land to black South Africans'	67	81	27	28	17
'There should be preferential hiring and promotion of Black African South Africans in employment'	66	80	17	31	15
'Government should ... give preferential contracts and tax breaks to black businesses'	60	72	20	26	13

Source: SASAS (2003)

By Self-Assessed Poverty Status, percentage that "agree" or "strongly agree" that...

BY POVERTY STATUS	SOUTH AFRICA	'BETTER OFF'	'JUST GETTING BY'	POOR
'In South Africa incomes are too unequal'	87	81	90	87
'Government should take more responsibility to ensure that everyone is provided for'	90	89	93	93
'Government's duty is to provide employment'	90	87	94	93
'Government should ... redistribute land to black South Africans'	67	59	75	84
'There should be preferential hiring and promotion of Black African South Africans in employment'	66	54	75	81
'Government should ... give preferential contracts and tax breaks to black businesses'	60	50	72	74

NOTE: Self-assessed poverty status is derived from responses to the following question: 'Would you say that you and your family are wealthy, very comfortable, reasonably comfortable, just getting along, poor or very poor?'. The 'just getting by' category corresponds to the original 'just getting along' response. Finally, the 'better-off' category represents a collapsing together of those that identified themselves as 'wealthy', 'very comfortable' or 'reasonably comfortable'.

Source: SASAS (2003)

Egalitarian attitudes by country (percentage that "strongly agree" and "agree")

COUNTRY	DIFFERENCES IN INCOME IN YOUR COUNTRY ARE TOO LARGE	IT IS THE RESPONSIBILITY OF GOVERNMENT TO REDUCE DIFFERENCES IN INCOMES
Bulgaria	96.9	85.0
Russia	95.5	86.2
Portugal	96.0	89.9
Hungary	93.1	80.1
Slovenia	91.0	84.8
Slovakia	93.7	74.5
Latvia	96.7	78.7
Poland	89.1	84.9
Austria	86.2	72.5
Spain	89.3	79.3
Czech Republic	87.8	71.9
France	87.4	67.5
South Africa	86.6	90.1*
Great Britain	82.4	68.7
Germany	82.2	61.2
Norway	72.5	61.9
Sweden	71.1	59.5
Japan	69.2	52.6
Canada	70.6	47.5
New Zealand	73.2	49.4
Australia	70.9	49.7
USA	66.2	35.3
Average	92.3	80.7

Source: Redmond et al (2002) using ISSP 1999 data

* The phrasing between the SASAS and ISSP modules was somewhat different, which may partially explain the observed differentials in relation to government responsibility.

Ben Roberts is Chief Researcher in the Integrated Rural and Regional Development Research Programme. This article is based on a chapter analysing the responses elicited by questions on attitudes to poverty and inequality in the 2003 South African Social Attitudes Survey, which will be published in a book early next year.

NEW HSRC COUNCIL

Mr Mosibudi Mangena, Minister of Science and Technology, has appointed the following members of the new HSRC Council, for a period of four years from 1 November 2004:



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BA, University of the Western Cape Independent researcher in gender and democratisation issues; Board member of the Development Bank of Southern Africa; Former member of the ANC Commission on the Emancipation of Women, and the Gender Commission.

Expertise: gender policy, development processes and political transition



DR PUMLA GOBODO-MADIKIZELA

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Expertise: cultural process, trauma and HIV/AIDS, inter-group behaviour and violence



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MR ENVER MOTALA

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MR MAX SISULU

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Expertise: public administration, political economy and development studies



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PHD, University of the Witwatersrand Professor of Sociology and Director of Sociology of Work Unit, University of the Witwatersrand; President of the Research Committee of Labour Movements for the International Sociological Association; Member of the University of the

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Expertise: workplace sociology, democratic transitions

EXAMINING PRIVATE HIGHER EDUCATION IN SOUTH AFRICA

By Glenda Kruss

A few years ago the debate around private higher education in South Africa centred on the issue of regulation: should private provision be allowed to exist in the light of its competition with, and potential impact on, the public sector? How should the state regulate it?

In an attempt to go beyond the logjam in this debate, a study was launched to determine what forms of private provision existed, and what demands they were meeting. The findings are set out in the book *Chasing Credentials and Mobility: Private Higher Education In South Africa*. It was assumed that such an empirical study would be able to inform the policy goal that private higher education should complement public provision, rather than operate in competition with it.

A few short years later, debate has shifted to issues of the quality of private provision. The HSRC study did not set out to study, systematically, the quality of private provision. But the conclusions of the study can speak equally to this concern, as they suggest terms of engagement with two distinct forms of private provision.

The first type of private institution claims to meet a demand for education that is “better” than that offered by the public sector. These institutions tend to be owned by large education holding companies and operate with a strong profit orientation that imprints on all their activities.

They function primarily to offer mobility to historically and newly privileged socio-economic groups, claiming to respond to a demand for education that will be profession and career-oriented and to prepare graduates directly for employment and the demands of the workplace in highly-skilled occupations, particularly in business and management.

They offer high-status undergraduate and postgraduate degrees, concentrated in the fields of business and management, comparable to public university and technikon qualifications.

For these institutions, questions about quality are closely linked to the regulation of provision to ensure that private interests and

the potential for competition do not prevail to the detriment of the social good. These private institutions claim to do better than the public sector, and to offer equivalent programmes.

It is therefore appropriate that their focus and quality should be judged alongside and be expected to complement and match those of the public universities and technikons. It is also fitting that they should be subject to state

Private institutions should be subject to state regulation to guard against a proliferation of lucrative programmes, and a racial or gender imbalance in student profiles

regulation to guard against a proliferation of lucrative programmes, or a racial or gender imbalance in student profiles, to the detriment of the system as a whole.

The second type of private institution offers education that is “different” to that offered in the public sector, in that it responds to a demand for recognised credentials with high status to ensure direct employability in a specialised occupational niche market.

Some of these institutions have existed on the periphery of tertiary education for some time, offering technical and vocational education through private colleges and professional associations. They target and attract non-traditional students to equip them with the formal credentials to enter new occupational fields, such as tourism and leisure, entertainment and the media, as well as new levels within occupational structures in business and management.

These institutions tend to be small, proprietarily owned and operating primarily for profit, but they also include a small number of not-for-profit providers, particularly those with a religious orientation. In their orientation and focus, these providers offer programmes mainly at the intermediate level, in the form of certificates and diplomas at National Qualifications Framework (NQF) levels 5 and 6, meeting a demand that universities and

some technikons and Further Education Training colleges do not.

For these institutions, questions of quality are more closely linked to the co-ordination of provision, to ensure that they meet their potential to complement existing state institutions, and to contribute to intermediate skills development in the public interest.

Private providers may tend to focus on a limited range of lucrative fields or may offer poor quality, narrow-skilling programmes that do not turn out students who are fully employable – leaving critical gaps in provision at the intermediate level in key fields, across the education and training system.

Understanding these two forms of provision enables us to consider the distinct terms of engagement with private higher education anew. If the private higher education sector is to operate in a way that complements the public sector, the two kinds of institutions should be treated differently in regulation, co-ordination and quality control. •

Dr Glenda Kruss is a Chief Research Specialist in the HSRC's Research Programme on Human Resources Development.

The book, Chasing Credentials and Mobility: Private Higher Education In South Africa is available from www.hsrcpress.ac.za, or through leading book-sellers.

Profile Dr Anil Kanjee



Executive Director of the Assessment Technology and Education Evaluation Research Programme

By Ina van der Linde

Born:	1964, Boksburg
Marital status:	Married to Madhu. First met at the University of (the then) Durban-Westville in 1983, and again 12 years later in Pretoria. Two children, daughter Sanam (5), meaning “beloved” and son Praveer (4), meaning “brave”
Mother tongue:	Gujerati; home language, English
Qualifications:	DEd in Research and Evaluation Methods from the University of Massachusetts Amherst, BEd from the University of Cape Town
Relaxation:	Plays club football and coaches at the Delfos Football Academy
Currently reading:	<i>Development as Freedom</i> , by Amartya Sen; <i>Dude Where’s My Country</i> , by Michael Moore; <i>Getting Things Done – The Art of Stress-Free Productivity</i> , by David Allen

Back from a postdoctoral fellowship programme in New Jersey, Dr Anil Kanjee is bristling with energy and new ideas. He has just spent eleven months at the world’s largest private educational testing and measurement organisation, the Educational Testing Service (ETS) in Princeton.

At the Centre for Statistical Theory and Practice, Kanjee conducted research into the use of national and international assessment studies for improving the learning and teaching process. His main focus was on the different technical aspects of large-scale assessment studies, in particular, the use of “item response theory” for implementing research designs that increase the amount and quality of collected data, and improving the reporting and dissemination of information.

“Since I was at high school it has always fascinated me how we, as students, thought we had performed in a test compared to the scores we actually got. And in almost every instance there were huge discrepancies between the two,” says Kanjee.

This fascination was channelled into the choice of his future career path while he was studying at the University of Durban-Westville – the only university to which Indians were admitted during the apartheid years. It was here that his Psychology lecturer

inspired him to further his interest in assessment studies. Had it not been for this, his career would probably have taken a very different direction: that of town planning and urban development, one of his other keen interests.

Today Kanjee’s field of research is the analysis of education systems, and ways to affect and monitor education change. “My area of expertise is assessment and evaluation. I am not a curriculum specialist or a subject area specialist. I evaluate education systems by looking at methods, techniques, and designs at the macro and micro level. This involves the development of models and frameworks, as well as the use of specific research designs and statistical methods to identify trends and predict what is happening in such a system and how it could be improved.”

To give a practical example: Kanjee and his team would try to identify possible reasons for children not performing well at school. Sometimes the solution is obvious – to provide a feeding scheme for children at a certain school because they are going hungry. Sometimes the solution is very complex – such as that provided by the Assessment Resource Banks (ARBs), a project in which he takes great personal pride.

The ARBs were developed to provide

additional support to Foundation Phase teachers (Grade R-3) to assess and monitor the progress of their learners. The ARBs, available in eight languages, comprise sets of assessment tasks linked to each outcome specified in the new curriculum. Teachers can use the ARBs to assess whether individual learners have mastered the outcome and identify any area that requires additional intervention.

In 2003 the ARB project was extended by the funders, US-based Research Triangle International. Kanjee and his team were asked to develop ARBs in numeracy and literacy for the Intermediate Phase (Grades 4 to 6) and to provide training for educators on their use.

Kanjee’s career at the HSRC started in 1997 with his appointment as Director of the Assessment Studies Unit which focused on developing educational and psychological tests. In 2001, after the restructuring of the HSRC, he was appointed as one of the first Executive Directors.

Although the basic tenets of the old research unit remained, Kanjee immediately saw the need for developing the capability to do systemic evaluation, involving large-scale studies that focused on all levels (regional, provincial and national) of the education system. The unit was restructured and replaced by the Assessment Technology and Education Evaluation (ATEE) Research Programme.



An outdoor concert at a school in Valparaiso, Chile, where Dr Kanjee attended a workshop during his recent stay in the United States.

“We have to develop good people, retain the people we have, and use best practice”

Assessment of Maths and Science in Africa initiative (AMASA), which he was instrumental in establishing in 2001, together with UNESCO’s International Institute for Capacity Building in Africa. This initiative was aimed at bringing together key role-players from Anglophone Africa to promote dialogue, share and develop assessment and evaluation capacity, and to promote effective Mathematics and Science teaching and learning.

ATEE is doing “a lot of exciting things”, says Kanjee, with results from at least two of its long-term research projects set to be available soon. The first is the Evaluation of the Quality Learning Project, which measures the impact of interventions in 524 schools. The second is the Learner Achievement Monitoring Project (LAMP). The project monitors trends in Grade 9 learner performance and is designed to demonstrate best practices for evaluating education systems, for reporting and using information, and for identifying factors affecting learner performance.

The emphasis of the analysis is on using data to provide information to South African policy-makers and practitioners. For example, researchers have incorporated data on poverty in their analysis, and examined how poverty affects achievement scores.

How does it feel to be back at a much smaller institution, with its own unique set of circumstances? Says Kanjee: “I have realised that in South Africa it will be difficult to super-specialise to the degree that it’s done in the USA. We will always have to be ‘general specialists’. I have also realised the importance of keeping experience and knowledge in organisations. The modern-day practice of moving on after five years is not very helpful.”

Another lesson learnt was that developing world-class research programmes requires a “high investment in time, experience, and producing quality work. We are learning by doing.” •

Also read the related article on monitoring learner performance trends in the matric examinations, pages 8 and 9.

ATEE’s function is to provide relevant information to decision-makers at all levels of the education system, policy-makers, district officials, principals, teachers and parents, and to address the government’s transformation agenda to ensure access to quality education for all.

To this end, the ATEE team has developed a model for evaluating and monitoring the functioning of the education system. The model, known as “AQEE (pronounced a-key)

took ETS many decades of development to reach the stage they are at now. His vision is to develop ATEE into a world-class programme that does research to meet national priorities, but also contributes to the field of theoretical knowledge.

“We have to develop good people, retain the people we have, and use best practice. And if you do quality work, you will attract the contracts and the money to be able to do that,” he believes.

Another lesson learnt was that developing world-class research programmes requires a “high investment in time, experience, and producing quality work. We are learning by doing”

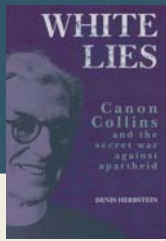
to improving learning”, is based on the policy goals of access, quality, efficiency and equity.

Based on its research, ATEE has also developed relevant material for teachers, for example the ARBs, to support the learning and teaching process at the classroom level. The team is currently developing a computerised version of the ARBs, called CARTS (Computerised Assessment Resource Tasks).

But developing such a research programme is a long and arduous process, Kanjee says. It

Another long-term vision is to establish closer ties with other developing countries from Africa, Asia and Latin America. “Links with Latin American colleagues are especially important, as their experiences would be especially beneficial to South Africa.” But as most of the material is available only in Spanish, language remains an obstacle. To overcome this Kanjee is now learning to read and speak Spanish.

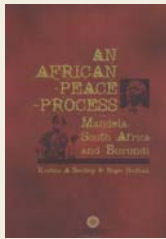
Kanjee is also keen on reviving the



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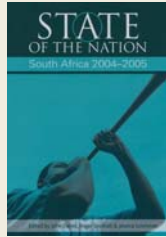


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Denis Herbstein

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392pp / 07969-2088-5 / R170.00 / October 2004

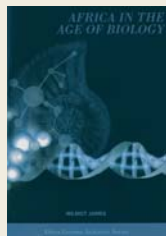


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Wilmot James

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