

# PRIVATE FURTHER EDUCATION AND TRAINING IN SOUTH AFRICA

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The Changing Landscape

SALIM AKOOJEE



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MONOGRAPH**

**RESEARCH PROGRAMME ON  
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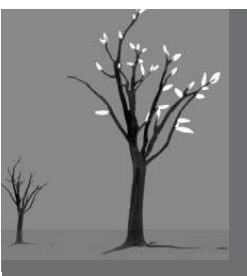
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# ABBREVIATIONS

ADEC	Association of Distance Education Colleges
APCSA	Association of Private Colleges of South Africa
cVET	Continuing Vocational Education and Training
DoE	Department of Education
DoL	Department of Labour
ETD	Education, training and development
FET	Further Education and Training
FTE	Full-time equivalent
GET	General Education and Training
HE	Higher Education
HR	Human Resources
HSRC	Human Sciences Research Council
ICT	Information and Communication Technology
ILO	International Labour Organization
iVET	Initial Vocational Education and Training
NBI	National Business Initiative
NGO	Non-governmental organisation
NQF	National Qualifications Framework
SAQA	South African Qualifications Authority
SETA	Sector Education and Training Authority
TVET	Technical and vocational education and training
UNESCO	United Nations Education and Scientific Council





# INTRODUCTION

Private provision of technical and vocational education and training (TVET) in the further education and training (FET) band has assumed national importance as the legislative process designed to enable national registration and accreditation gathers pace. This has recently been heightened by the perceived expansion of private provision and the consequent need to regulate the sector. Regulation has become increasingly urgent as the current climate allows for the proliferation of providers, leading to widespread concerns about 'fly-by-night' operators delivering poor quality programmes (DoE 1997 & DoE 1998). While on the one hand there is the realisation that the sector has an important complementary role to play as an alternative educational demand-driven role player, on the other, there is a need to ensure that providers deliver programmes of acceptable quality.

The first step to achieve better management of private provision is to develop a comprehensive picture of the sector. This study attempts to do just that. It intends to capture the complexity of the phenomenon of private FET provision in South Africa.<sup>1</sup> In so doing, it provides an in-depth look at what is a constantly changing landscape. It is changing because the very nature of the provision, it is argued, requires it to be flexible, responsive and appropriate for circumstance. For some, the very notion of private education is intrinsically antithetical to notions of national redress, equality of access and equity. For others, it enables the development of skills not provided for by other means.

In attempting to capture the complexity of provision, this project was undertaken in two phases. The first phase (component 1) provided a quantitative assessment of the sector in the course of 2002. The second phase (component 2) examined the provision of some providers in the course of 2003. Together these components provide the most up-to-date data and analysis of the sector at this time. The study was undertaken at a time of considerable policy development and provides an important source for understanding the sector.

Part One explores the background and methodology, while Part Two discusses the findings of both the quantitative and qualitative components of the study.

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<sup>1</sup> Additional data for this monograph is available at <http://hrdreview.hsrc.ac.za>.

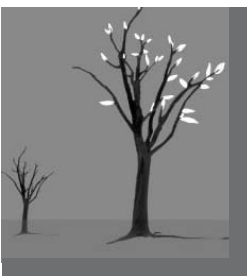




# PART ONE: BACKGROUND, DEFINITIONS AND METHODOLOGY

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1. Background
2. Definitions
3. Methodology



# I BACKGROUND

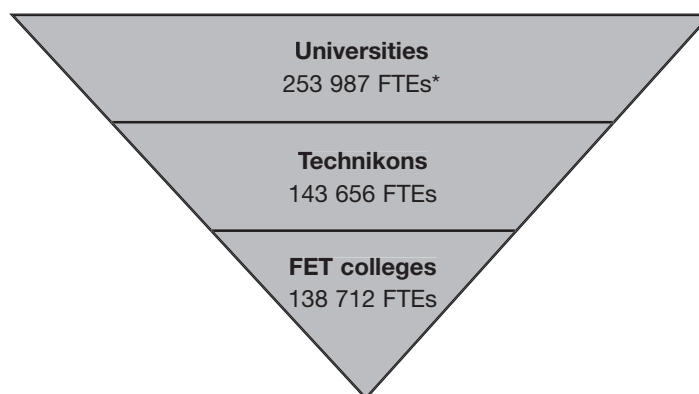
This section begins with a background to the issue of private provision as it pertains to technical and vocational education and training (TVET),<sup>2</sup> referred to as the Further Education and Training (FET) sector in South Africa. This background incorporates issues around private and public provision as it affects provision in the sector. The issue of regulation is discussed as it addresses the way in which the sector is currently unfolding. This leads to a discussion around definition in the South African context. The methodology incorporating both the quantitative and qualitative components of the study is then described.

## Background

No definitive study has been undertaken of private TVET-FET provision in South Africa. A previous study (Buckland, Jaff & Reid 1996) suggested that the private FET sector has an important role to play in providing the market with skills responsive to employer needs, which could not be provided by public institutions. Despite this, the report of the National Committee on Further Education (DoE 1997: 9) warned that any data on the sector 'must be treated as provisional' as information is 'patchy and imperfect'. Since then, little work has been done to examine the extent of the sector in South Africa. What has resulted is wide-ranging guesstimates of the extent and importance of the sector.

The skewed enrolment pattern at various levels in the public sphere reflects the extent to which the system needs to readjust in line with international trends. The *Human Resources Development Strategy for South Africa* (DoE & DoL 2001) highlights the skewed distribution of learners in South Africa across publicly funded universities, technikons and technical colleges – a pattern which goes against international trends where college and polytechnic (technikon) enrolments are usually far larger than university enrolments. This 'inverted triangle' of learner distribution is shown in Figure 1.1.

Figure 1.1: The inverted triangle of FET and higher education provision, 1999/2000



Source: DoE & DoL 2001: 30 (Figures updated from Fisher, Jaff, Powell & Hall 2003:333 and Subotzky 2003a: 362)  
Note: \* FTEs – full-time equivalent students

Updated figures, adapted from the Department of Education (DoE) and Department of Labour (DoL) (DoE & DoL 2001) figures, still reflect a skewed enrolment pattern. There were 253 987 full time equivalents (FTEs) at universities (Subotzky 2003a), a further

<sup>2</sup> More recently this term is replaced by the term 'skills development'.

143 656 FTEs at technikons (Subotzky 2003a) and almost 139 000 FTEs at public FET colleges in 1999 (Fisher et al. 2003). Private higher education headcount enrolments in 2001 were estimated at 85 000 (Subotzky 2003b). As such, post-school enrolments in South Africa are strongly biased towards university and are very low in the case of public technical colleges. TVET offered by private FET providers is considered by some to assist in rectifying this imbalance.

### The public/private debate

The notion of a private provider in which education is 'viewed as a source of profits in which curriculum becomes a product, students are treated as consumers and faculty relegated the status of contract employees' (Euban 2000 quoted in Giroux 2003: 187) is in sharp contrast to the view that it is an effective, efficient, more flexible and responsive alternative means of education provision than public provision (Hofmeyr & Lee 2002; Smit 2000; Yeomans 2001a, 2001b).

Critics of private provision in education argue that private education in general is contrary to the notion of education as a public good. However, studies such as that of Atchoarena and Esquieu (2002) argue that, in TVET at least, because there is limited responsiveness of public providers to the expressed skill needs of employers and individuals, there is both a market and a need for private providers to contribute to individual, enterprise and national skills development. Provision of private education, therefore, is considered to have a complementary role (Atchoarena & Esquieu 2002; Rose 2003; Stiglitz 1998). The international literature on TVET suggests that the private provision sector is increasingly becoming an important source of technical and vocational skills provision (Atchoarena & Esquieu 2002).

The primacy of the market gained prominence in international education and training debates in the early 1990s, led by economists and educationalists in the World Bank. They suggested that private provision and privatisation were a real alternative to wasteful and inefficient government provision (Middleton, Ziderman & Van Adams 1993; World Bank 1991). More recently this policy position has been replaced by a more considered role for the market in which private provision is considered a more complementary means of TVET provision (Johanson 2002; Johanson & Adams 2003). The positions of both the International Labour Organization (ILO 2002) and the United Nations Education and Scientific Council (UNESCO) (UNESCO & ILO 2002), while still confirming the need to revitalise the public sector, are consistent with this general move to see the role of the market as a significant means by which to complement provision. The joint UNESCO/ILO recommendation of TVET provision on policy, planning and administration, for instance, notes that, 'Technical and Vocational Education and Training is best served by a diversity of public and private providers. The appropriate mix can be found in many ways with the *responsibility of governments being to facilitate choice while ensuring quality*' (2002: 13, emphasis added).

In South Africa, the legitimacy of private provision appears inconsistent with principles of unfettered educational access enshrined in the Freedom Charter. The Constitution of the new political order nevertheless reinforces the private imperative. Article 29.3 of the Constitution (RSA 1996) upholds the right to provide private education services that do not discriminate on the basis of race. This constitutional right, however, has been

critiqued on the basis that class differentiation has replaced racial segregation, and that this is by and large still racially defined.

The public system is expected to respond to the national agenda for skills development within a context of equity, and to engage with human resource supply issues, while private providers concentrate on 'demand-side' imperatives. More recently, these very different agendas have converged to suggest that both the public and private sectors should be responsive to national concerns, with the state taking an active interest in and co-ordinating the development of private provision.

### Regulation

There are two imperatives that have underpinned recent attempts to regulate the sector. First, there is a need to ensure that people who attend these institutions are not exploited by so-called 'fly-by-night' operators, and second, there is an imperative to ensure that those institutions that are 'educationally sound and sustainable' (DoE 1998: 20) are not discouraged from continuing their provision. This means that regulation has a dual purpose – to ensure consumer protection as well as to create an enabling environment for the sector to exist.

Historically, there has been limited state regulation of private colleges. Colleges offering distance education were required to register with the Correspondence College Council under the Correspondence Colleges Act of 1965. However, private institutions offering tuition-based instruction were not required to register. Until 1998, two voluntary bodies regulated the sector: the Association of Private Colleges of South Africa (APCSA) and the Association of Distance Education Colleges (ADEC).

The Further Education and Training Act of 1998 (RSA 1998) establishes the need for registration, or conditional registration, as a precondition for offering FET training. Criteria for registration include financial capability, maintenance of acceptable standards (that is, standards not inferior to those at comparable public FET institutions), and compliance with the quality assurance procedures defined by the South African Qualifications Authority (SAQA).

Regulation represents the first step towards the achievement of two important principles: on the one hand, it recognises the existence of the sector, on the other, it requires the sector to respond to priorities considered appropriate from a national perspective. The regulatory framework seeks to ensure that both learners and reputable providers are protected from the negative effects of unscrupulous operators.

A pre-registration process was undertaken to begin the process of registration in the course of 2001. Private providers were required to provide institutional information to the national DoE.<sup>3</sup> This was followed in October 2002 by the publication of the draft Regulations for the Registration of Private Further Education and Training Institutions (DoE 2002). The DoE is currently in the process of putting in place the administrative framework for the registration process.

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<sup>3</sup> The results of this process have been consequently published as a 'Pre-Registration Report, 2001' (DoE, 2003).

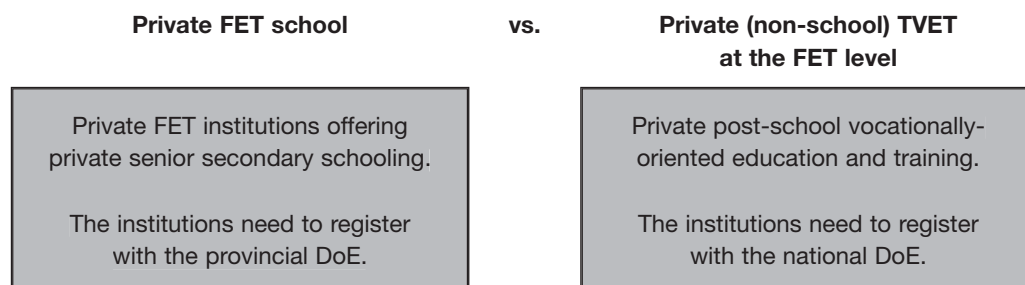
## 2 DEFINITIONS



There is no easy definition of private FET provision, especially since the FET level incorporates the last three years of academic schooling as well as vocational and career-oriented courses in technical colleges and institutions that are equivalent to Grades 10–12 in the academic stream. Both public and private providers operate in the academic and the vocational streams.

This study is based broadly on current conceptions of private FET used by the DoE, which refers to programmes offered by private providers at levels 2 to 4 (Grades 10–12) in terms of Regulation 8 of the National Standards Bodies Regulations on the National Qualifications Framework (NQF) (SAQA 1998). It deliberately excludes private school-based FET provision. The institutions included in this study incorporate those private non-school vocational education and training providers who, in terms of current legislation, will need to register with the national DoE as private FET institutions. This is in contrast with private schools, which register at the provincial level. Figure 2.1 describes this distinct focus.

*Figure 2.1: Definitional focus of the FET band in this study*



It is evident that providers who are registered for FET programmes are also likely to offer programmes at other levels – either at the level of higher education (HE) or general education and training (discussed later in this monograph). This is especially important since the NQF is expected to deliver institutions which are ‘programme’-driven resulting in, ‘greater permeability and articulation across boundaries between the differing sub-sectors of FET, and between FET and HE, thereby promoting progression and diversity of provision’. (Kraak & Hall 1999:52)

For reasons of convenience, the private TVET sector as defined above will now be referred to as private FET for the rest of this study.



## 3 METHODOLOGY

The research for this monograph was undertaken in two stages. The first was a quantitative phase geared towards mapping the landscape of private provision and the second was a qualitative analysis of selected institutions to provide details regarding the nature, typology and form of provision.

### The quantitative phase

The quantitative study was based on two sources. The first was the results of a pre-registration exercise undertaken by the DoE in 2001 and the second, a survey conducted by the Human Sciences Research Council (HSRC) in 2002. The information regarding provider size, location and typology was obtained from the DoE dataset (DoE 2003). This dataset was used as a sampling frame for the HSRC study, referred to as the 'HSRC 2002' study. This latter study elaborated on the nature and form of provision, including ownership profile, learner and staff composition, and nature of programmes offered. From a database containing 864 providers that pre-registered with the DoE in 2001, 238 providers responded to the HSRC's electronic survey. The 28 per cent response rate for the survey yielded valuable insights into a sector not hitherto investigated.

### The qualitative phase

Cases for the qualitative component were selected from among respondents to the HSRC survey. Ten institutions were selected as case studies on the basis of typology, location and size. The typology of for-profit, not-for-profit and in-house providers obtained from the Atchoarena and Esquieu (2002) study began the selection process and was supplemented by location (provincial, in city or outside) and size of learner component (as indicative of the extent of provision). The study began with a desktop documentary or electronic analysis, where this was available, of the selected provider after in-principle consent was obtained for the research to be undertaken. Documentary sources at this stage included the completed HSRC questionnaire, information from the provider's website and/or promotional material requested from providers where this was supplied. Researcher workshops were held before and after the visits to enable clarity of purpose and to ensure that appropriate issues relevant to the research questions were understood. A team undertook field studies of between two and four days at each of the sites. Individual interviews were held with the researchers after the submission of written reports. Field visits to two providers did not materialise for various reasons. Information on these two cases was obtained from an analysis of their responses to the HSRC questionnaire, from their websites and, in one case, from a colleague who had studied there. A brief profile of each of the institutions surveyed is provided below.

- *Provider A:* vendor training by a large Information and Communication Technology (ICT) multinational. This provider was initially located in the for-profit category on the basis of its responses to the survey. However, the field visit suggested that the training provided should be considered as part of the corporation's sales function. This ICT company, which trades in both software and hardware, requires that vendors be trained in the use of the products they sell.
- *Provider B:* a large multi-purpose provider. This for-profit provider with branches nationally is directed at the public and the corporate sector. It provides an interesting blend of provision encompassing general employee upgrading, programmes for jobless youth and corporate training. As an institution open to the public, it liaises

directly with clients (learners) in most cases, but also links into the focused needs of the corporate sector for specialised purposes. It offers a vast array of courses, many of which are directed at specialist labour market niches – for example, courses in ICT project management, game ranging management or call centre management.

- *Provider C:* a lean provider of NQF-aligned training to the corporate sector. This institution in the for-profit category caters specifically for the corporate sector. It provides short courses tailored to client needs that are marketed explicitly as being NQF-aligned. Considerable effort has been put into Sector Education and Training Authority (SETA) and SAQA alignment in order to provide a market niche for the provider. The provider makes considerable use of consultants and is pursuing a black empowerment link-up.
- *Provider D:* a rural provider of ICT training. This institution is based in a small business centre in a former homeland area and provides basic ICT end-user training to its local clientele. It also provides photocopying, fax and email services and has provided ICT support to some local institutions such as the nearby public hospital.
- *Provider E:* in-house delivery of continuous skills upgrading for the staff of a parastatal. This parastatal in the chemical sector provides ongoing training for its staff within the workplace. It uses computer-based self-paced learning programmes purchased from an international vendor, which are available to staff via strategically located computer terminals 24 hours a day. The programme is geared to automatically track learners and enable management to monitor progress. Training is linked to the performance management system of the company.
- *Provider F:* in-house training in a large food and beverage franchisee. This is an in-house provider located in one of the larger metropolises. It responds to the needs of employees by both providing relevant programmes and in-sourcing other programmes required. In keeping with a dual community and employee development focus, it also provides a number of scholarships to first-time tertiary and further education students.
- *Provider G:* empowerment via training at a large mine. Although this large mine, located in a remote area, provides in-house training to its own staff, the centre under study is a provider of skills development to the surrounding community. It offers programmes in areas such as plumbing, bricklaying, carpentry and needlework and promotes self-employment.
- *Provider H:* community development activities from a religious non-governmental organisation (NGO). This church-inspired NGO participates in national development by employing community outreach skill strategies. It has focused on teacher development in rural communities, and works closely with provincial education authorities. It is linked to a large public university, which certifies its post-FET level courses and allows postgraduate articulation. It also offers teacher development courses on an ad hoc basis as funding allows.
- *Provider I:* reaching out-of-school youth through the efforts of a small, local NGO. This provider is a South African NGO specifically targeted to respond to the skills development needs of out-of-school youth unable to access the labour market. The institution is based in the capital of one province, with branches in other less resourced provinces with significant unemployment. Learners are offered initial courses intended to provide skills necessary to access the formal labour market, or are supported in their efforts towards self-employment.
- *Provider J:* a private school with a vocational interest. This township-based private school has engaged in some technical skills-based programmes. It intends to expand to post-school provision. It has also offered computer programmes for the community.

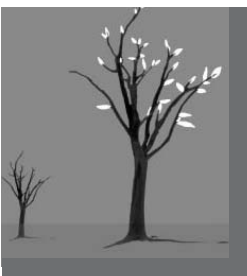




## PART TWO: FINDINGS

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4. Institutional landscape
5. Learner profile
6. Programmes
7. Personnel profile
8. Conclusion



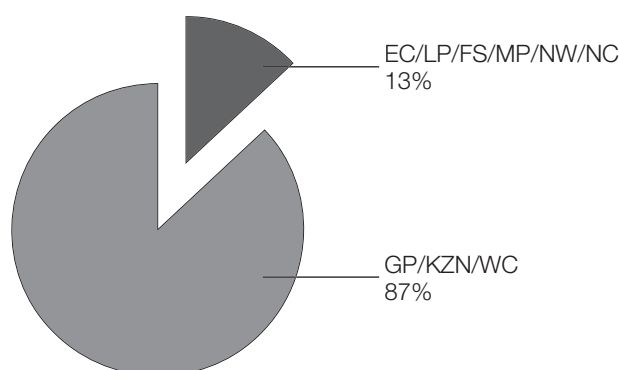
## 4 INSTITUTIONAL LANDSCAPE

This section reports on the findings of the quantitative and qualitative study of the private FET sector in South Africa. In terms of the quantitative component, the findings of the DoE survey of 2001 and the HSRC survey undertaken in 2002 are analysed. The qualitative component incorporates the case studies described above, undertaken in 2003. Results are reported under four broad areas: institutional landscape, learner profile, programmes and personnel profile. The extent to which the sector engages with the human resource needs of the country is also described.

### Provincial profile

The provincial institutional profile indicates a considerable predominance of institutions from the major urban metropolises of Gauteng, KwaZulu-Natal and Western Cape (see Figure 4.1). More than three-quarters of the combined national enrolment is located within the provinces that have a large metropolitan presence – Gauteng (57 per cent), KwaZulu-Natal (20 per cent) and Western Cape (ten per cent). The more rural of the provinces make up the rest – Eastern Cape (five per cent), Limpopo (four per cent), Free State (three per cent) and Mpumalanga and North West (one per cent each), with negligible enrolment in the largely rural Northern Cape.

*Figure 4.1: Provincial location of private FET providers*



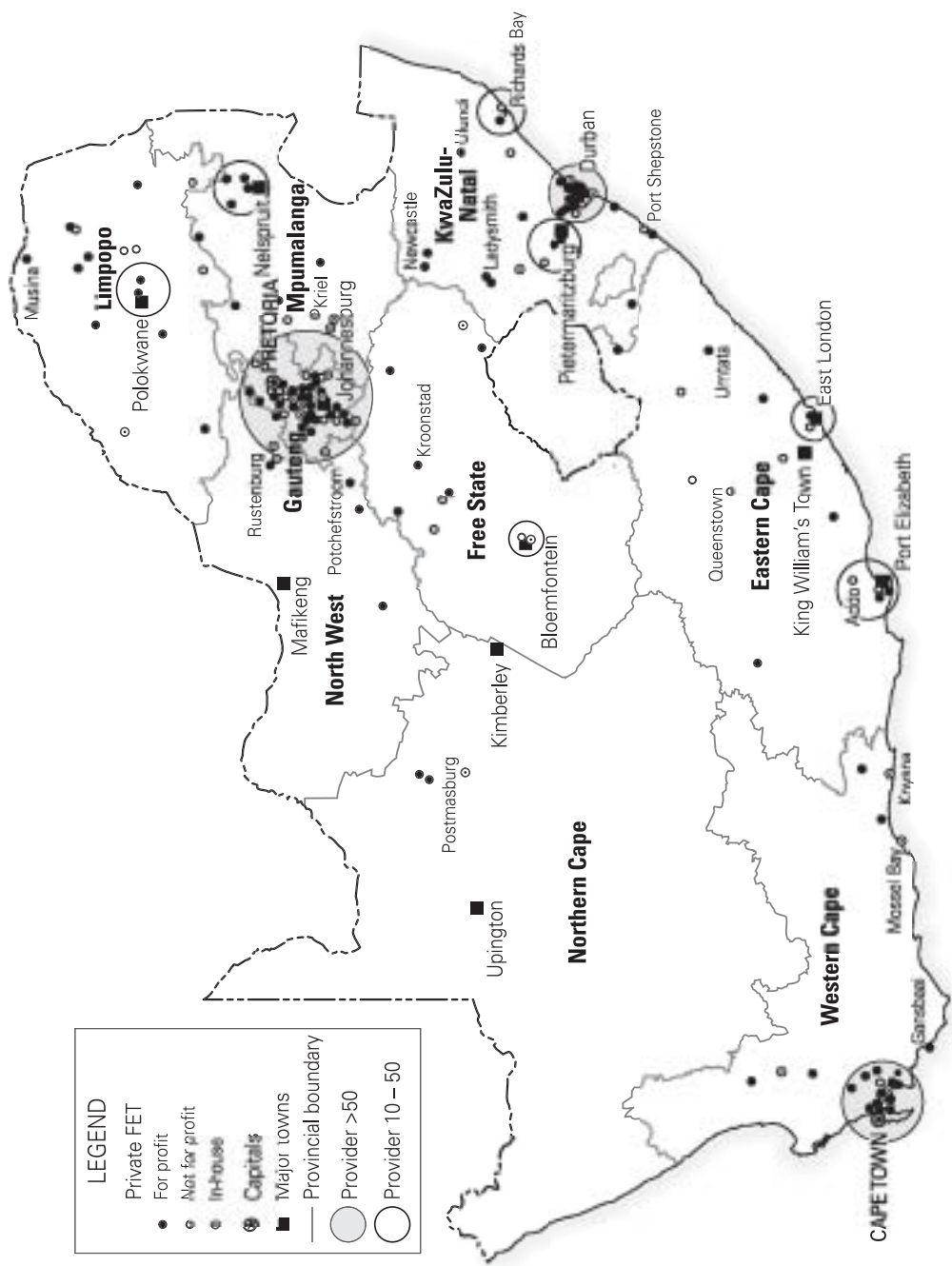
Source: DoE 2001

### Core and non-core areas

The map in Figure 4.2 shows the areas in which private FET institutions are located in South Africa. Most providers are located within provincial capitals. There is a significant spread of institutions in the Gauteng area. Significant provider presence is also reflected in the Pietermaritzburg and Richards Bay areas in KwaZulu-Natal, areas associated with considerable economic activity. The predominant provider presence in the Eastern Cape, Mpumalanga, Limpopo and Free State are in or near their respective capitals, that is, East London (close to Bisho in the Eastern Cape), Nelspruit (Mpumalanga), Polokwane (Limpopo) and Bloemfontein (Free State). These are considered core areas.

The map also shows the limited provider presence in areas outside the central areas (capitals and main cities), or non-core areas. There is a larger presence of not-for-profit providers located in the non-core areas of the Eastern Cape and Limpopo. In general, however, there is a large number of for-profit providers even in 'non-core' areas. Thus for-profit providers are also located in the 'non-core' areas of KwaZulu-Natal, Eastern Cape, Mpumalanga, Free State and Limpopo.

Figure 4.2: Distribution of private FET institutions in South Africa



## Core and non-core provider presence:<sup>4</sup>

Core presence providers are located within the metropolitan areas in South Africa – with high urban populations as well as high economic growth and development. Two core areas are presented in Figure 4.2:

- The unshaded circle represents a region containing between ten and 50 private FET providers. Areas include the Nelson Mandela metropole, East London (Greater Buffalo), Pietermaritzburg, Richards Bay, Nelspruit and Polokwane.
- The gray-shaded circle represents regions with more than 50 private FET providers, and includes the Greater Peninsula metropole, Greater Durban and Gauteng. Gauteng province has been included as a region due to the urban nature of the province.

Non-core presence providers fall outside the core areas as defined above, and include smaller urban areas, rural towns and rural areas. None of the non-core areas display a concentration of ten or more private FET providers within a relatively small land area.

The urban nature of provision is evident on the map. There is a significant rural presence of providers located in North West (33 per cent) and Mpumalanga (21 per cent). Admittedly, these are off a small overall base, seven of 21 providers in North West and seven of 34 providers in Mpumalanga. Interestingly, however, even in these areas most providers located in the non-urban areas are for-profit or in-house, indicating a significantly low proportion of not-for-profit providers in these areas. One explanation for this is that most not-for-profit providers have head offices in urban centres, when they actually provide services to those in rural areas, as evidenced in the cases of Providers G and H in the qualitative study. One of these not-for-profit providers had recently relocated to an urban location to access funding. This provider was also able to improve co-ordination of the services of the branches in rural areas.

## Institutional typology

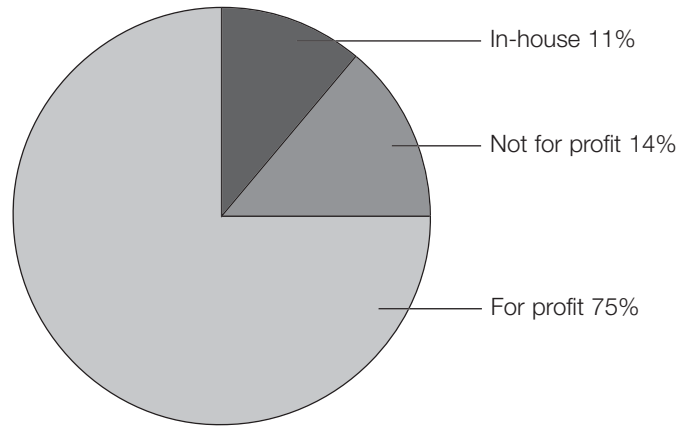
Figure 4.3 depicts the profile of providers in terms of their pre-registration submission. A working typology was developed by the HSRC and applied to the institutions in the DoE pre-registration database, based on the nature of ownership. The three ownership types were initially developed by the World Bank-funded study into private TVET provision in sub-Saharan Africa

- For-profit providers;
- In-house providers, i.e. employers taking responsibility for the provision of training themselves; and
- Not-for-profit or non-governmental organisations involved in skills development. (Atchoarena & Esquieu 2002: 46–7)

Figure 4.3 outlines the shape of the South African FET sector using this typology.

<sup>4</sup> The categorisation of urban/rural was done in terms of a representation of the Census 2001 enumerator area (EA) classification (Stats SA 2003). The HSRC Geographic Information System (GIS) Unit overlaid the private FET shapefile onto the EA 2001 shapefile in the GIS application, ArcView 8.1. Urban areas corresponded with EA 11, 12, 13, 14, while rural areas corresponded with EA 33, 37 and 38. This GIS application contains automated techniques to produce the map.

Figure 4.3: Private FET institution by typology



Source: DoE 2001

The large numbers of for-profit providers represents a significant feature of provision in the country. Understandably, the relatively insignificant presence of not-for-profits is the result of the difficulty of sustaining the sector in the context of a decline in external funding in the post-apartheid context.

The relatively small number of in-house providers (11 per cent) may be indicative of their perception that registration is not necessary. Another factor might be a possible trend to outsource training, or the tendency of South African business to reduce spending on training since the late 1980s. With regard to the latter, it has been reported that between 1990 and 1998 there was a drastic reduction in private sector workplace employee industrial training – from 344 907 in 1990 to 77 812 in 1998 (Badroodien 2003; DoE & DoL 2001: 36). Possible reasons for this decline identified by Bird (2001) include direct factors such as the withdrawal of tax concessions by government in 1990, and indirect factors such as the ‘privatisation of state-owned assets, political instability and student militancy requiring the redirection of funds, economic re-structuring associated with decline in engineering and manufacturing, and consequently a reduction in the need for skilled artisans’ (2001: 6). There was a reported decline in corporate training in the period after 1996 while the new skills development regime was being developed.

The qualitative study revealed considerable differences in the way this typology is realised in practice and suggested that there was considerable heterogeneity within these layers.

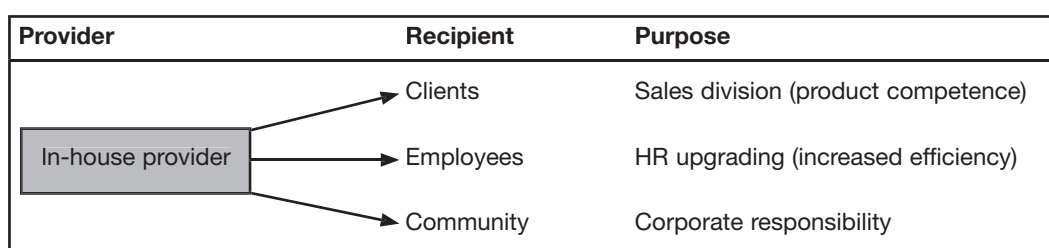
#### Types of in-house providers

Figure 4.4 identifies three different recipients of in-house training: clients, employees and community. The first category of recipient, the client, is intricately linked to the profitability of the concern. Training for clients cannot be dissociated from the product. For these providers, the success of their products is dependent on the extent to which clients understand these products. Some ICT software and hardware providers would clearly fit into this category, for example Provider A.

The second category is employees. Relevant training is provided in-house in order to enable employees to either be more effective in their current function or to upgrade their skills for promotion. This was observed in the case of Provider E.

The third category includes community outreach programmes as part of the corporate responsibility function of a company, as was observed in the case of Provider G. Large corporations in South Africa were encouraged by the King Reports of 1994 and 2002 (IDS 1994, 2002) to ensure the sustainability of the communities in which they were located or which they purported to serve. Some companies have also been engaged in skills development initiatives as part of their corporate responsibility commitment.

*Figure 4.4: Types of in-house provision*



There is also a degree of specialisation within each of the categories. Some providers are specialised in one of these functions, while others combine two or even three roles.

### Types of for-profit providers

One distinction among the for-profits, for instance, is to be found in their response to particular niche target markets (see Figure 4.5). There is a degree of specialisation amongst for-profit providers. They are normally responsive to a particular target market – they either cater for the ‘in-company’ training requirements or for the general public. Those that straddle both these groups have generally created different administrative units to deal with each target market.

‘For profits’ catering to the needs of the corporate sector target human resources (HR) divisions of large corporations, government agencies or parastatals which outsource either all or part of their training function. In this instance training is done in partnership with the commissioning authority, normally the HR division as evidenced in the case of Provider C. Training is focused, with a particular purpose, and is of shorter duration, normally one to seven days, sometimes spread out over a period. Since these courses are specifically developed to suit the particular requirements of the company, they are more expensive than those offered over a longer duration.

Those for-profits catering specifically to the needs of the general public target out-of-school youth and/or those currently in employment. Those out-of-school youth who attend these programmes are either unable to access the job market or are unwilling (or unable) to enter the public system as in the case of Provider B. For employed learners, there is motivation to upgrade their qualifications to increase their promotion prospects or to enable self-employment. These learners are self-funding except when training is deemed to fit in with company criteria.

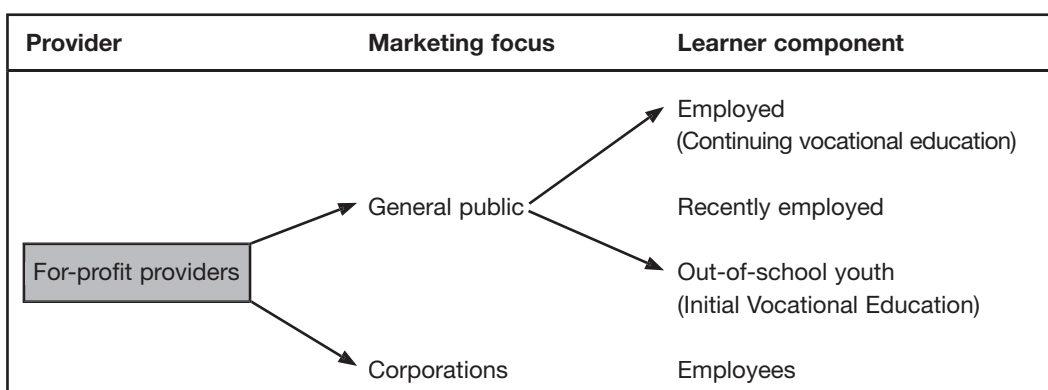
The distinction between the two groups is likely to be found in firstly, when tuition is provided and secondly, the cost of tuition. For employed learners, tuition is usually offered after hours or on Saturdays. For out-of-school youth there is a ‘full-time’

## INSTITUTIONAL LANDSCAPE

component undertaken during normal working hours. The courses offered for out-of-school youth are of a longer duration, normally running for at least 12 to 18 months, with possibilities of follow-up with the chosen provider. For employed learners, courses are normally of a shorter duration of between six to 12 months, with less need for advancement and follow-up.

The longer-term courses were normally less expensive when compared to the shorter, structured courses, presumably targeted at the employed learner, and which were likely to be more valued in the market. The longer courses aimed at self-funded learners have to try to keep costs affordable. This is the provider group most likely to be in need of regulation or support for sustainability. On the one hand, such providers may be the most aligned to governmental goals around equity and access; on the other hand, their low-cost model may make them the most likely providers of poor quality learning. If the state does seek to actively intervene in the area of private provision it may find itself facing hard decisions with regard to this segment.

Figure 4.5: Typology of the for-profit provider



### Types of not-for-profit providers

Not-for-profits are directed at particular niche markets, either out-of-school youth or recently employed (now unemployed) members of disadvantaged communities. The need to be more tightly focused is driven in large part by the decline in external funding for NGO initiatives that occurred after 1994, as was the situation for Provider H and Provider I. For these providers, there has also been an increasing move to charge user fees, if simply to secure commitment from learners to complete the prescribed course. Some not-for-profits are also located within larger corporations as part of their corporate responsibility imperatives, as in the case of Provider F.

### Institutional growth

Data from this quantitative study shows a massive growth in the private FET sector since 1990. Seventy per cent of providers were established in the period between 1992 and 2001 as compared with 14 per cent in the previous decade (see Table 4.1).

## PRIVATE FURTHER EDUCATION AND TRAINING IN SOUTH AFRICA

*Table 4.1: Growth of private FET provision, 1982–2001*

Year established	Number of providers established	Rate of growth over previous period (percentage)	Percentage of total number of private providers in 2001	
Before 1982	35		16	16
1982 – 1986	10	29	5	14
1987 – 1991	20	100	9	
1992 – 1996	70	250	32	70
1997 – 2001	84	20	38	
<b>Total</b>	<b>219</b>		<b>100</b>	<b>100</b>

*Source: HSRC 2002*

In broad terms this growth trend is consistent with the findings of the National Business Initiative (NBI) study of private FET colleges (Buckland et al. 1996: ii), which noted that total enrolment had increased by 44 per cent from 1993 to 1995, followed by a 34 per cent increase from 1995 to 1997 and a 94 per cent increase over the four-year period 1993 to 1997. This institutional growth trend is also consistent with trends in sub-Saharan Africa (Atchoarena & Esquieu 2002; Bennell 2000). The growth pattern, therefore, suggests a significant demand-driven imperative in the sector in the 1990s, associated with the twin processes of economic liberalisation and globalisation (Akoojee & McGrath 2004).

Atchoarena & Esquieu (2002) argue that the two reasons for the growth of private provision in sub-Saharan Africa are: first, the poor quality of the public TVET system which is unable to accommodate increased demand and, second, the perceived advantages of private provision, which is considered to be closer to the needs of the labour market.

This analysis, however, has weaknesses both as a general statement and in the specific context of South Africa. First, it implies a degree of choice that is unlikely to be the reality for many potential learners, whether in terms of geographical or financial accessibility of private providers. Second, the argument about the poor quality and limited access for expansion of the public system does not hold particularly well in the South African case. Indeed, the public system shows some possibilities for improvement in quality and evidence of expanding demand. Third, whilst it may be plausible that private provision is considered to be closer to labour market realities, there is no evidence that this is a major motivating force for access to private provision in South Africa.

The reasons for growth in demand for private provision in South Africa may better be explained by a range of factors including the renewed national focus on skills development and the skilled personnel outflow from public sectors.

It was noted earlier that there had been an apparent decline in corporate training expenditure during the 1990s. However, it is clear that the state has acted strongly to reverse this decline. Indeed, there is evidence that the National Skills Development



Strategy is now achieving a growth in training activity. This is supported by dynamics within both the public and private sectors since 1994, including the public sector focus on service delivery and the impact of affirmative action across both sectors.

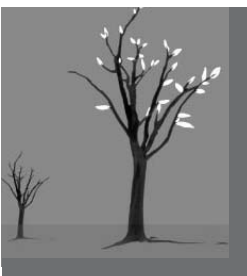
In addition to the need for skills development among those previously excluded, there was also a push by some corporations to accord with the commitment of the King Reports (IDS 1994 & 2002).<sup>5</sup> In the case of at least one provider in this study this laid the basis for the establishment of a community skills provision department.

The outflow of personnel from the public sectors, both from departments of education and the South African National Defence Force, complemented the growth of private provision. It is noted in case studies that a number of ex-civil service personnel were employed in the sector after having left the civil service in the mid-1990s; some were responsible for setting up institutions during this period. In the case of former public educators, the opportunity to leave was provided by the offer of 'voluntary severance packages' to personnel in March 1996, designed to reduce the absolute numbers of teachers and to deracialise the sector (Weber 2002). This made their skills available to the private sector. In the case of the defence force, one reason cited for leaving was unhappiness with the new order.

It is evident that this 'push factor' appears to be consistent with the general finding that the private sector in sub-Saharan Africa does benefit from the 'investment and experience accumulated in the public sector' (Atchoarena & Esquieu 2002: 22). However, it is not clear whether in South Africa it does so directly 'through the use of curricula and training materials' (Atchoarena & Esquieu 2002: 22). It is evident that the particular circumstances in the country during the 1990s benefited the sector in terms of personnel and so assisted in its rapid expansion. In South Africa growth in private provision has been spurred on by the increased demand for skills and enabled by the increased number of private institutions, which in part were staffed by personnel exiting from parts of the public sector.

While the perceived articulation with the needs of the labour market has always been an argument used by private providers to explain their popularity, this does not capture the complexity of the demand for skills. It appears that public TVET institutions were either considered unable or unwilling to provide for those most in need of upskilling in the initial years of transition, a period which required personnel from disadvantaged groups to take on positions vacated by departing civil servants in the shortest possible time.

<sup>5</sup> The King Report of 1994 (IDS 1994) was replaced with another report developed in 2002 (IDS 2002). These reports were developed to respond to the global trend towards responsible corporate governance in emerging economies. The South African version was widened to include 'an integrated approach to good governance in the interests of a wide range of stakeholders having regard to the fundamental principles of good financial, social, ethical and environmental practice' (IDS 2002:6). The need to be socially responsible was widely publicised as a positive unique response by corporations to link in with national development imperatives and with the 'profound social and political transformation' (IDS 2002:5).



## 5 LEARNER PROFILE

### Types of learners

The kinds of learners for which private providers cater are a major determinant of their sustainability. Learners can be divided into three main types, essentially determined by their employment status. These are ideal types and there is likely to be considerable overlap between these categories. Each category is described below.

#### Out-of-school youth

Out-of-school youth and marginalised individuals are those who have never been employed or have recently left school and have been unable to secure full-time employment. This group includes people in rural and urban areas, especially women and youth.

The motivation for this group is to become sufficiently skilled to either compete in the job market or to pursue sustainable self-employment. In keeping with their low fee structure, designed to accord with the affordability of their clients, for-profit providers targeting this group consider themselves to be most vulnerable to the 'vagaries' of the market. The challenge they face is to ensure that their provision is sustainable as learner numbers determine if they can meet their overhead costs. It is these providers that are likely to close their doors at short notice, and could be those referred to as the 'fly-by-nights', as in the case of Provider D in the qualitative study. Interestingly, these providers are most enthusiastic about the potential of registration to ensure sustainability of the sector.

The other provider type that services this group is the not-for-profits. As pointed out earlier, they have to survive on an ever-dwindling pool of funds as a result of the decline in international donor aid and a limited pool of corporate responsibility funding. More recently, corporates have targeted the larger NGOs which have a considerable public profile, such as the Nelson Mandela Fund and Umsobomvu, a largely government-funded poverty and skills development initiative. The smaller providers are well aware that their sustainability is not guaranteed and that they are by and large dependent on their ability to generate funds, as observed in the cases of Providers H, D and I.

#### 'Recently employed'

The second category, the recently employed, includes those who have been previously employed. They have re-entered the education system with the intention of either securing formal employment or creating possibilities for self-employment. These learners have an expectation that their enhanced skills and qualifications will enable them to re-enter the labour market. They are sometimes catered for by some not-for-profits which cater for the more mature learner, as in the case of Provider J. They are also provided for by those for-profits catering for the general public which charge lower end-user fees (as in the case of Provider D).

#### 'Employed learners'

The third category, employed learners, is catered for through in-house company training initiatives. Training is linked to internal company efficiency and the possibilities of internal mobility and promotion, as in the case of Provider E. The motivation for these employees is that their improved qualifications will enable them to access enhanced

## LEARNER PROFILE

opportunities in their current occupations or increase their marketability in alternative employment contexts. Some providers in the for-profit category, such as Provider C, also respond to the training needs of this group where companies have outsourced some aspect of their training. They are also served by more recognised service providers, possibly companies listed on the stock exchange, with considerable experience in training and who have a track record of sustainability, such as Provider B.

The for-profits that cater for this group are both specialist corporate providers as well as those catering for the general public. The for-profit specialist corporate provider offers training in skills designed to increase efficiency with the aim of improving employee functioning. It is also likely that this company-motivated training is responsive to a particular issue or perceived skill deficiency in the working environment. In this case, the primary motivation for learning comes from the employer rather than the learner, except when this is linked to a company's performance appraisal system, in which case the learner might well request training to improve internal mobility. This group of learners is likely to be funded directly by the company.

Other for-profits which service employed learners are those providers which target the general public. In this instance, employees access these providers either to improve their in-company promotion prospects or to increase their chances of accessing alternative employment. These employees are likely to be self-funded and the programmes they source are generic, rather than company-specific, as in the case of the specialist corporate provider sourced by the company such as Provider C. When funded by the company, the qualification obtained by this group is also likely to count for internal mobility and promotion.

This group is to a lesser extent also served by the not-for-profits' for short courses in training which is not related directly to their core function, for example first aid or computer courses for cleaning staff.

*Table 5.1: Learner 'market' by provider type*

Learner type	Motivation of Provider		
	For-profit	Not-for-profit	In-house
Out of school youth	Access to employment	<b>Access to employment</b>	Corporate community outreach
Recently employed	<b>Access to employment or self-employment</b>	Access to self-employment	Corporate community outreach
Employed learners	Improve current employment possibilities or find alternative employment	Short upskilling programmes in specific non-essential areas	<b>Improve performance/employment Progression Sustainability of operation</b>

*Source: HSRC 2002. Note: Those marked in bold suggest a predominant motivation of the particular learner type, with the others serving as subsidiary motivations.*

Table 5.1 summarises the situation as regards providers and their predominant learner types. They represent a broad categorisation of an ideal type, which might contain significant overlap.

To conclude, those entry-level post-school learners – out-of-school youth and marginalised individuals – are accommodated for essentially by the not-for-profits, and to a lesser extent by the for-profits. The for-profits catering for this sector are distinguished by a low-fee paying structure. Low-fee paying service providers who target out-of-school youth also see an opportunity to target those that have been recently employed, who see in training an opportunity to expand their skills for the possibility of re-entering the labour market. Employed learners as a rule are serviced by internal company training initiatives. Recently some companies have tended to outsource training to some for-profit providers catering for this group. There are also those in-house providers with a social development focus which are involved in provision at this level.

The distinction between these learner types is also evident in the type of programmes that each is offered. Initial Vocational Education and Training (iVET) programmes are typically provided to recently unemployed and out-of school youth, while Continuing Vocational Education and Training (cVET) programmes are typically offered to employed learners (see also Section 6 on Programmes and the distinction between iVET and cVET).

### **Learner enrolment**

Learner headcount enrolment in the private FET sector needs to be understood within the context of the nature of learning, curriculum design and the form in which learning occurs. This means that even an individual who has undergone a one-week training course, for example first aid, can be considered part of the total headcount, thus swelling numbers considerably. The full-time equivalent (FTE) calculation is not meaningful in this system, which is extensively reliant on courses of shorter duration (see Section 6 on course duration).

Additionally, the way in which at least some providers have defined learning suggests a considerable degree of flexibility has been built into provision. Learner numbers are difficult to determine for this reason. Thus, at one site (Provider E), reference is made to the number of courses completed in the calendar year, rather than the number of learners completing selected courses. This suggests not only a completely novel way of thinking about course completion, but also gives the impression of a considerable degree of course adaptability to learner needs. Of course, in this case the dominant mode of instruction was computer self-paced learning, which in itself might not have adequately addressed the issue of local learner contexts (see Section 6 on Programmes). In another case (Provider D), no accurate learner records were reportedly kept at all.

With this caveat illustrating the complexities of the sector, the quantitative estimate of the learner headcount enrolment of the private FET sector in the pre-registration process (DoE 2001) was 706 884 learners for the 864 providers. The estimated 4 178 delivery sites comprising this DoE database (2001) suggest that the sector is robust. In terms of this definition, this far exceeds estimates of the private higher education sector which currently comprises 86 DoE 'reporting institutions' with a headcount enrolment of 85 657 students in 2000 (Subotzky 2003b) These enrolments also exceed the public FET sector, reported to be 350 000 in 2000 (Fisher et al. 2003).

The figure for private FET is likely to change considerably as a result of the registration process should the lessons from the higher education registration experience be learned. After registration the headcount enrolment declined, and the absolute number of institutions appears to have been considerably reduced (Kruss 2003; Mabizela 2003). In addition, what makes this all the more likely is the fact that FET encompasses all levels of post-school provision, some of which are not strictly under departmental scrutiny.

### **Learner enrolment by NQF level**

In spite of being registered in the FET band, many providers are engaged in delivery in other NQF bands. The HSRC survey shows a 48 per cent headcount enrolment in FET (NQF levels 2 to 4), seven per cent in higher education (NQF level 5), and a significant 45 per cent enrolment in general education and training (NQF level 1).<sup>6</sup> This multi-band provision may lead to tensions with a regulatory regime that appears to be developing band-related registration and accreditation procedures.

Enrolment trends also suggest a significant convergence of provision at NQF levels 4 and 5. Kraak (2003) points to a tendency towards convergence between public and private provision of public FET and higher education (HE) at NQF level 5, as in the case of some public for-profit providers (Provider B and Provider C). The results of this survey confirm the overlap of provision from the side of private providers, which accord with the results of the study by Badroodien (2003). At the same time, this survey also revealed a tendency for private FET institutions to fill the gap in adult education and training by offering provision at the general education and training (GET) level. The impact of this convergence in provision is critically important as a means by which this sector responds to the intermediate skill needs of the economy.

Programmes currently pegged at the FET level might well be downscaled to the GET level (below level 2) or upgraded to HE once the registration and accreditation mechanism have been finalised. It might well be necessary to review the definition of this FET sector in the light of the current definitional imprecision. It may be appropriate to move to an internationally acceptable term like 'TVET' or skills provision as an alternative.

### **Learner race and gender profile**

#### **Race profile**

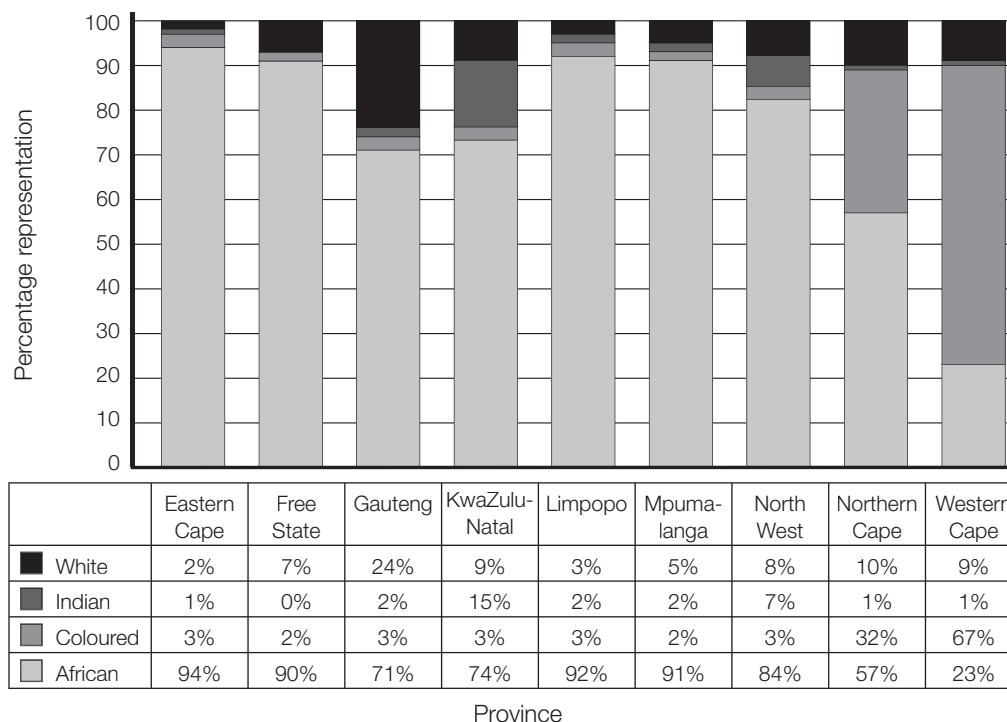
The enrolment profile of private providers as surveyed by this study corresponds with the demographic profile of the country: white enrolment stands at ten per cent, while black enrolment makes up the rest (African enrolment at 73 per cent, Indian enrolment at six per cent, coloured enrolment at 11 per cent).

Figure 5.1 provides a breakdown of demographic headcount by province. It reveals that the racial profile of learners closely follows the provincial demographic profile. The provincial average for African enrolment is 75 per cent. However, in the Western Cape and the Northern Cape, African enrolment is 23 per cent and 57 per cent respectively. In both of these provinces, coloured enrolment is significant at 67 per cent and 32 per cent respectively. Indian enrolment is found mostly in KwaZulu-Natal, accounting for 86 per cent of nationwide Indian enrolment. In KwaZulu-Natal itself, Indians make up 15 per cent of the total enrolment, with African enrolment at 74 per cent.

<sup>6</sup> At least one provider (Provider J) surveyed in the qualitative component of the study offered courses at school level. Another provider also offered entry-level in-company courses in first aid and life skills.

## PRIVATE FURTHER EDUCATION AND TRAINING IN SOUTH AFRICA

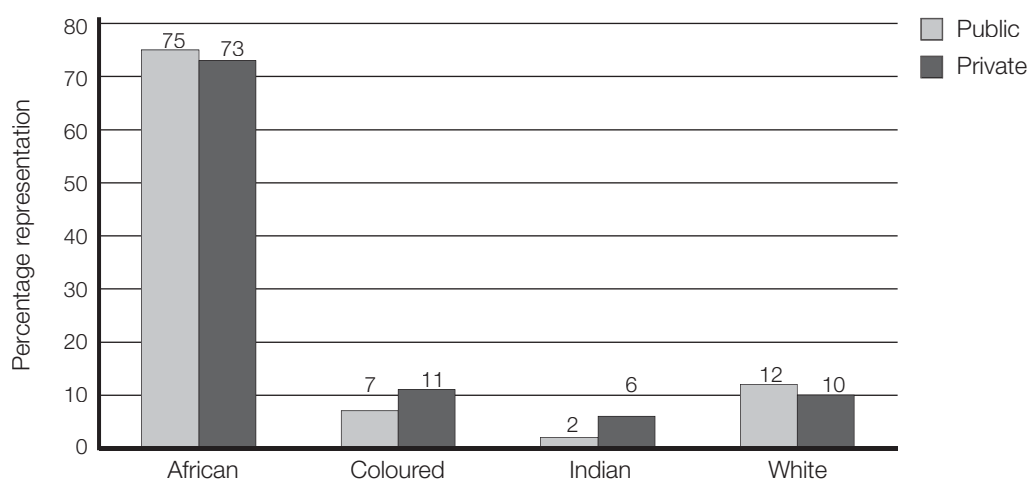
Figure 5.1: Enrolment at private FET institutions by province and race, 2002



Source: HSRC 2002. Note: Due to rounding percentages may not add up to 100.

Figure 5.2 compares the racial profile of learners in the public and private FET sectors. Although data for the two studies are separated by two years, there is nevertheless a marked similarity between the two profiles. Private enrolments are slightly lower than public enrolments for Africans and whites (both by two per cent), but slightly higher for coloureds and Indians (both by four per cent).

Figure 5.2: Comparison of headcounts between public technical colleges (2000) and private FET providers (2002)



Source: HSRC 2002; Fisher et al. 2003

## LEARNER PROFILE

**Gender**

The gender profile of learners in the HSRC study indicates a 57 per cent male component. This is consistent with enrolment in the public sector. It is also consistent with the National Business Initiative (NBI) study (Buckland et al 1996: 11), which found that females constituted 42 per cent of all learners enrolled in private colleges. The programmes for which females were registered in the private FET sector have not been determined.

**Learner age and employment status**

The findings in this study are particularly significant for outlining the age and employment status of the learner component. The age profile of learners in the private FET sector contrasts sharply with that of the public FET sector. In public FET, the majority of learners are in the post-school age group of 18 to 24 (Fisher et al. 2003), while this survey revealed that the majority of learners (58 per cent) are over the age of 25 (Table 5.2).

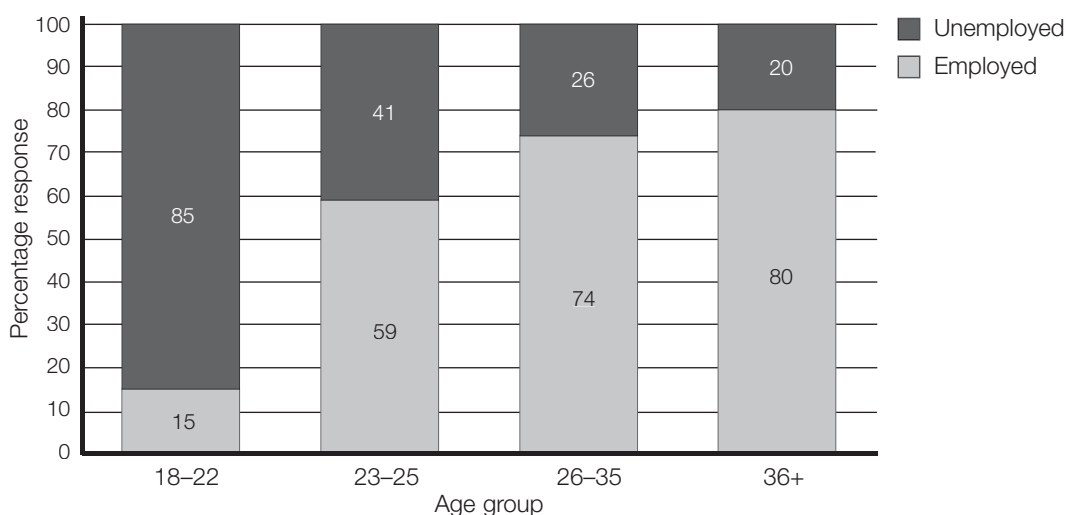
*Table 5.2: Learner age profile in private FET institutions, 2002*

Age profile	Age groups in years				Total %
	18–22	23–25	26–35	36+	
Enrolment proportion	25%	17%	35%	23%	100
	42%		58%		100

*Source: HSRC 2002*

In addition, 58 per cent of learners in private FET institutions were reportedly employed. Figure 5.3 shows that in the age cohort 36+, 80 per cent of learners are employed, compared with only 15 per cent in the age cohort 18–22.

*Figure 5.3: Learner employment status by age at private FET institutions*



*Source: HSRC 2002*

The data as provided in Table 5.2 and Figure 5.3 show that learners in private FET are largely adult and employed. Enrolment at private FET providers therefore is closer to the trends in the Australian public FET system, which demonstrates an over-25 age enrolment of 62 per cent as compared with 27 per cent for public FET enrolments in South Africa (DoE & DoL 2001: 26). The contrast between Australia and South Africa suggests that there may be nothing inherent in either public or private provision that makes one more appropriate to this age group. As the public system in South Africa is encouraged to be more responsive to the needs of the older, already employed group, it will be important to examine further the responsiveness of both types of provision to this constituency.

It is argued that private provision is already focused on being responsive to the needs of this clientele. For public providers this may suggest a need to focus on similar forms of responsiveness when dealing with those who are already employed. This includes ensuring that programme duration, location and contact times are specifically responsive to client needs.

### Learner employment aspirations

Another aspect of the alleged better responsiveness of private providers is that their services lead to better labour market outcomes. This belief is supposed to motivate learner enrolments. Certainly, providers concur with such sentiments, as Table 5.3 shows, in regard to their accounts of the reasons for learners choosing their institutions.

*Table 5.3: Perceptions of private FET providers regarding learner motivation for choosing to study at their institutions*

Reasons	Response (percentage)
Possible job opportunities	42
Cost/value for money/affordability	30
Mid-career training	28
<b>Total</b>	<b>100</b>

*Source: HSRC 2002*

### Possible job opportunities

At least from the provider point of view, learners view the possibility of employment as an important factor in their decision to access private training opportunities. Provider B and Provider D articulated this in their public marketing endeavours. Providers who regarded this as an important feature of provision were likely to be those who serve the general public, rather than those who target the corporates. However, the capacity of these providers to actually secure employment for learners has not been conclusively determined. Indeed, there is a dearth of research in this area. It is also these providers who consider that 'cost/value for money/affordability' is also a significant reason for learner enrolment, while the issue of 'mid-career training' is likely to be particularly important for those already in employment. Each of these factors is elaborated below:



*Cost and value for money:* While the issue of the cost or value for money is important for all types of learners, it is particularly so for learners who are self-funding. This issue is less important for employed learners than the possibility of employment opportunities for those outside the formal employment sector. For-profit providers providing 'mid-career training' opportunities for employed learners are less concerned with making their programmes cost-effective, and more concerned with ensuring that their programmes achieve the purpose for which they have been designed.

For-profit providers who serve out-of-school youth cite 'personnel' and 'programme costs', together with locational costs (such as rent and others) as an important determinant of cost. The opportunities which the skills developed provide for the learners are less important for this group when compared with the 'employed group'. It has been found that the more costly programmes are those providing short-term vocationally specific skills, for example for the South African Police Service or the equivalent in the ICT sector.

*Mid-career training:* For employed learners, mid-career training is either commissioned by the company or sourced by the employee. In-house or for-profit providers cater for this group for short duration skill-specific upskilling. Learners are motivated either by promotion possibilities or possibilities for alternative employment.



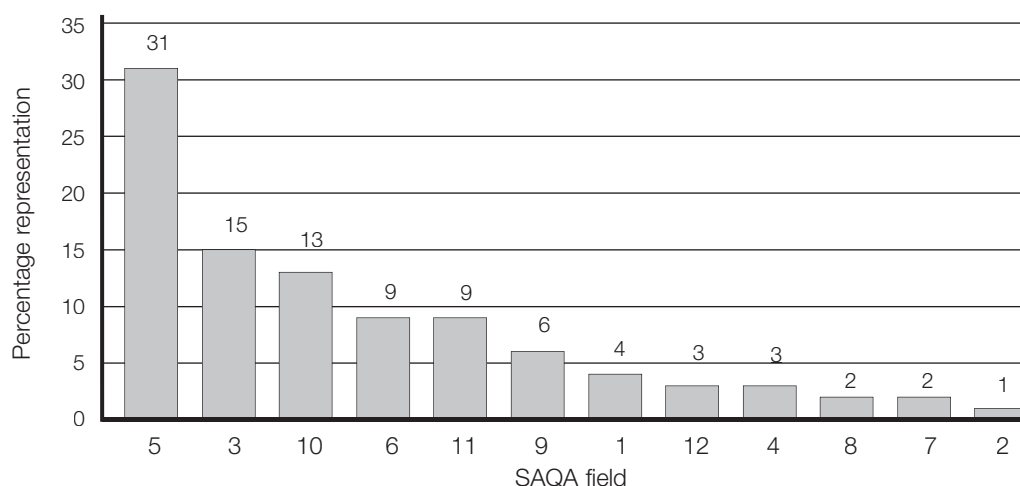
## 6 PROGRAMMES

### Programmes by SAQA field

This study confirms the trend of private TVET provision in Africa mainly to ‘concentrate on “light” vocational skills in business, commercial and service subjects because of the high capital costs involved in providing more industrial-type skills’ (Johanson & Adams 2003: 55). Studies in Senegal and Mali (Atchoarena and Esquieu 2002), Zimbabwe (Bennell 2000) and Botswana (Mudariki et al. 1997) confirm this finding.

In this study 31 per cent of learner enrolments are in the SAQA field called education, training and development (ETD),<sup>7</sup> as depicted in Figure 6.1. This is followed by a 15 per cent enrolment in business, commerce and management studies, which is followed closely by 13 per cent in the field called physical, mathematical, computer and life sciences. Together, these three fields make up 59 per cent of the total learner enrolment in the 12 SAQA fields.

Figure 6.1: Programmes offered at private FET institutions by SAQA field



- 1 Agriculture and nature conservation
- 2 Culture and arts
- 3 Business, commerce and management studies
- 4 Communication studies and language
- 5 Education, training and development
- 6 Manufacturing, engineering and technology
- 7 Human and social studies
- 8 Law, military science and security
- 9 Health sciences and social services (including basic medical programmes, social work)
- 10 Physical, mathematical, computer and life sciences
- 11 Services (including hospitality, tourism, consumer services, transport, retail and wholesale, and personal care)
- 12 Physical planning and construction (including architecture, town and regional planning, and building construction)

Source: HSRC 2002

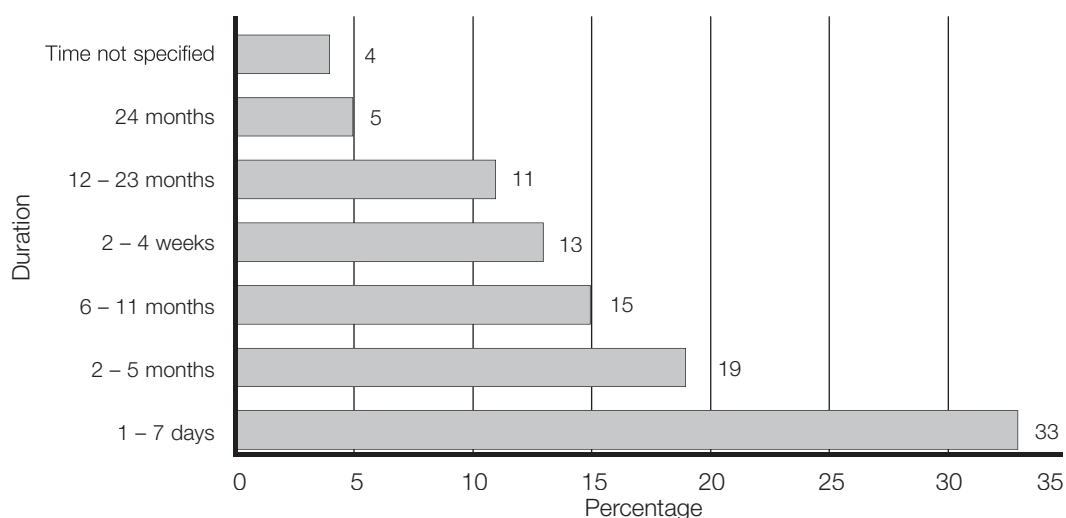
<sup>7</sup> ETDP courses strictly include general education and training school-level qualifications for those wishing to complete formal schooling, adult basic education and training courses and early childhood development training. The evidence, however, from the qualitative study suggests that since legislation had just been developed, providers were uncertain about the exact nature of the SAQA field direction to which their programmes conformed in the context of the developing policy framework. The information provided in the survey suggests the envisaged programme direction. This is likely to be resolved with registration.

The private sector appears to differ markedly from the public sector in this regard. In public FET colleges, over 50 per cent of the enrolments at FET level are in engineering studies (Powell & Hall 2000: 29), whereas enrolment in the private FET sector in manufacturing, engineering and technology constitutes only nine per cent. It is possible that the cost of initial start-up and maintenance of these programmes makes it either unprofitable or unsustainable for private providers. This suggests an important market niche for public provision and implies that private provision cannot respond in a meaningful manner to this important component of the intermediate skill requirements of the South African economy (Kraak 2003).

### Duration of programmes

Programme duration serves as a significant characteristic feature of private provision. Figure 6.2 shows that 33 per cent of programmes are of short duration, between one and seven days. In addition, almost two-thirds (65 per cent) of programmes are short modular courses with a duration of less than six months. The figure shows that only 15 per cent of programmes are between six and eleven months duration, a further 11 per cent between 12 and 23 months, and only five per cent last for two years. This confirms the findings of an earlier private HE study, which noted 'the trend towards providing a wide range of programmes to attract non-traditional students and to capture market opportunities in income generating short-cycle courses' (Mabizela, Subotzky & Thaver 2000: 7).

Figure 6.2: Programmes offered at private FET institutions by duration, 2002



Source: HSRC 2002

Course duration is linked to the purpose and the learner. Those companies and organisations that outsource parts of their training function to for-profit institutions tend to commission specific courses of shorter duration (1–7 days), while courses offered to out-of-school youth are of longer duration (6–18 months). However, this distinction with respect to duration makes less sense for some in-house providers which rely extensively on computer-based self-paced learning for employee upgrading, as in the case of Provider E.

Findings suggest that there is a clear demand by employed learners and their employers for short vocation-specific courses designed to respond to a particular vocational direction. The appropriateness of these courses is therefore significant from the perspective of value, perception and maximisation of resources. For the employee the aim is to receive qualifications that are likely to secure employment progression, while for the employer such training enables the attainment of employee skills in a short time without an extensive effect on productivity.

The extent to which these short courses are able to deliver what Kraak (2003) regards as 'broad and polyvalent' skills necessary for national skills development is less clear. However, if these courses are designed to respond to specific skill needs identified by the employer for employee upgrading and or increased efficiency, that is cVET (discussed further below), then training is likely to address a lacuna in national skills development. Even if these short courses are considered to be 'narrow and functionally dedicated to a single activity' (Kraak, 2003: 664), they are likely to play a vital role in upgrading employee skills. However, the impact of these skills for the individual in progressing up the ladder in the NQF needs to be better evaluated.

There is a widespread perception that short courses are inevitably narrow and of limited quality. However, a study into learners' evaluation of 3- and 6-hour ICT courses found that they benefited from the experience when they were provided with adequate individual support by tutors (Kirk & Kirk 2002). This has been confirmed in this study.

### **Delivery**

#### **Modularisation**

The survey component shows that the majority of providers (89 per cent) offer modular courses. Of these, 79 per cent report that these courses lead to further qualifications. This serves as an important backdrop to the 'flexibility' principles envisaged in the NQF.

#### **Distance versus contact tuition**

This study also shows that the dominant mode of instruction is contact or instructor-led tuition (for 76 per cent of providers). Only four per cent of providers reported that they used distance mode exclusively, while 20 per cent reported that they used a mixed mode of delivery (see Table 6.1). This finding is in sharp contrast with the study by Buckland et al. (1996), which showed that more than three-quarters of learners were enrolled in distance programmes. However, it is consistent with the data on the private HE sector (Subotzky 2003b), which found that 75 per cent of institutions offered tuition in contact mode as compared with 15 per cent in mixed mode and nine per cent in distance mode.

*Table 6.1: Description of educational mode at private FET institutions – distance versus contact tuition*

Mode of delivery	Response from providers (percentage)
Instructor-led education (contact provision)	76
Mixed mode (distance and contact)	20
Distance education (via materials and supplementary tutorials)	4
<b>Total</b>	<b>100</b>

*Source: HSRC 2002*

Where the mode of delivery was dominated by either ICT or pre-packaged material mediated through non face-to-face contact, learners expressed the need for more interaction. This is consistent with Unwin's cautionary note from the British experience:

And when flexible learning actually means being left alone in front of a computer screen or simply being shown where the library is, most learners will crave time with a knowledgeable teacher. (2003: 9)

It is important to note that provider interpretations of 'instructor-led' delivery included those where contact took place intermittently, or not at all where it was perceived to be unnecessary. The differing interpretations of 'instructor-led tuition' suggest that in reality the notion incorporates a range of quite diverse pedagogic practices. For example, in the case of Provider E, in which learners were expected to engage quite extensively with a pre-programmed computer-based learning programme, delivery was considered by the provider to be 'instructor-led', with the understanding that the information in the self-paced programme was of sufficient quality to be instructor-led. In this case, the course co-ordinators were on stand-by for assistance should it be required.

### **Time and space flexibility**

Timing of delivery is often considered to be a distinctive feature of the private FET sector. For employed learners for whom 'face-to-face' interaction was the preferred mode of learning, the company ethos and attitude to training determined when training happened. It was often preferred that training happened outside of working hours. Much non-contact learning also takes place after hours, although one case study did illustrate the practice of learning being considered as an integral part of the working day.

In general, providers preferred to use working hours to provide training, except when specifically commissioned to do so by the 'accountable commissioning authority'. Those who catered to community or public needs generally used working hours. For those employed learners who paid for training themselves, training was structured for after-hours and on Saturdays. In this situation, the clientele determined the time at which instruction happened. Where there was no motivation to train after-hours from the learner or financial authority, there was little evidence of preference for training after-hours.

The kind of provision has implications for the kind of location and space considered adequate. One for-profit provider confidently declared that all they required was a 'spot' from which to operate. This encapsulates the extent to which this provision differs from the brick-and-mortar reality of public education institutions. Understandably, the kind of courses provided enables provision at different sites, including the employer's premises.

Space requirements are also determined by the kind of clientele. Those providers dedicated to responding to out-of-school youth and marginalised individuals require dedicated premises from which to operate. Interestingly, this sector also uses the general working times used for public providers, except for Saturday tuition to fit in with transport schedules.

The form of provision also determines the space required. The in-house provider that used a 24-hour accessible work centre to enable continuous training, for instance, required workstations in accessible locations within the company. Although this was very convenient from a time/space perspective, it had some shortcomings regarding the level of individual support and relevance to South African conditions (see below).

### **Content, assessment, quality and legislation**

The programmes of private providers are typically based on minimal to low costs in order to ensure sustainability and speedy cost recovery. Content and curriculum process are heavily influenced by the employment context and are focused on 'practical' and hands-on skills acquisition. The mission and general thrust of the provider often underpin these. In general, for in-house providers the results of the training need to be borne out by practices, which necessitates that programmes link in to the needs of the employment context. The programmes of in-house providers and those for-profits catering to the corporate sector are, therefore, focused on the immediate needs of 'on-the-job training'. The extent to which programmes are directed at skills that are considered 'multi-functional (and that are) broad and polyvalent' (Kraak 2003: 662) has not been determined.

#### **Programme 'in-sourcing'**

It is sometimes feasible for providers to purchase programmes from an outside vendor, what we refer to as programme 'in-sourcing', rather than have them developed within the organisation. Providers argued that this serves to achieve a degree of programme integrity and gives learners some security about the nature of the provision. They argued that 'in-sourcing' enables quality assurance to be built in to the programmes since the programmes were already appropriate for purpose. This has implications for the kinds of skills required of educators in this sector. For instance, they are not expected to be skilled in curriculum development (see below).

In-sourced programmes include, for instance, the International Computer Driving Licence programme, which certifies learners' computer competence, and the Pitman's international secretarial qualification. However, a concerted effort is necessary to ensure that these learning packages are responsive in the South African context. It was found, for instance, that programmes bought from outside the country were directed at learners for whom English was a first language. At least one in-house provider studied had purchased

programmes from an international vendor. While these programmes had the attraction of saving development time and costs, there was concern that such packages were not relevant for South African conditions.

The degree of programme specialisation associated with increased institutional growth in the 1990s is explained by two mutually reinforcing trends, one global and the other local. The current discourse about job placement – that increased job-specific training will provide greater opportunities for placement – has translated into specific programmes for specific purposes. Thus providers have created programmes in very specific employment niches, such as call centre management or game ranging management, although the distinction between the two in terms of management skills is hard to identify clearly. This at least creates a perception that those out-of-school youth who complete these programmes are more likely to obtain employment in these sectors. For those within the sector, such programmes are a response to the opportunities created for upskilling and increase their chances for progression.

These programmes also create the expectation that the skills obtained can be immediately utilised by those who require them. However, there is no clear evidence to back this up, not least because the empirical proof of impact of training is particularly challenging.

The popularity of tightly focused short courses in private provision is linked to a broader trend both nationally and internationally in terms of long courses in the public sector. There has been a shift of delivery in HE, in some instance towards degree programmes intended to be more clearly linked to the labour market. These are expected to offer expanded employment opportunities. However, it has been argued that these particular labour market programmes close off, rather than open up, employment possibilities, especially in the context of a highly competitive labour market where many employers still place considerable faith in traditional academic programmes as a marker of quality.

There is a focus on knowledge transfer where programmes were purchased from elsewhere. In this case, the engagement with the information is favoured above more critical association with the knowledge – the focus is on ready-made recipes for successful integration of the learning into practice. The purchase of programmes and the duration of programmes from vendors makes the characteristics of the ‘facilitator’ materially different from that specified in the ‘norms and standards for educators by the Department of Education (2000).<sup>8</sup>

The function of educator as curriculum developer, facilitator or assessor has been re-defined. Often the facilitator is one who by their very nature takes on a consultative role in the private sphere.

What is provided in the private sector is, therefore, often systematically separated from who provides it, to whom and where and how it is provided. The nature of provision is associated with ‘best practice’, which tends to conceptually close off and eliminate debate about relevance and appropriateness for South African contexts. However, it could be argued that the transnational nature of some manufacturing practices requires a degree of

<sup>8</sup> The seven roles are: learning mediator; interpreter and designer of learning programmes; leader, administrator and manager; scholar, researcher and lifelong learner; assessor; a community, citizenship and pastoral role; and, a learning area/subject/discipline/phase specialist role.

uniformity in production practices, irrespective of national circumstance. In addition, the new globalisation discourse of 'world standards', in keeping with conceptions of 'world-class manufacturing', suggests universal applicability immaterial of context. By and large, this is consistent with the transnational movement of capital to which Castells (2001) refers and the national push to encourage its attraction for national benefit.

Providers argued that their provision is driven by a concern for quality as compared to the public provider. However, it was evident that private providers emphasised features of provision other than those found in the public sphere. Only 38 per cent of providers responded that they had 'external moderation' mechanisms in place. This suggests a materially different conception of quality as compared to that of the public provider. They based their conception of quality on individual learner support and the relevance of programmes based on labour market responsiveness, rather than internal (or for that matter external) moderation procedures.

Seventy-four per cent of providers responded that the dominant assessment procedure in place was either 'end-of-course test or examinations'. This is consistent with findings in the qualitative study. Interestingly, often the assessment procedure was pre-defined. When courses were purchased for instance, the assessment procedure was built in. Even where this was not the case traditional assessment was favoured. This often meant that assessment was removed from the hands of the facilitator/educator. The assessment procedure in use is to use either tick-boxes or computer-generated methods of response. According to providers, this not only made the assessment 'objective', but also enabled speedy response to learners. In some cases, programmes that were required to be assessed long after the course was delivered normally required the insertion of the experiences of the working environment. Where end-of-course assessment was not conducted by tests or exams, the provider provided a certificate of attendance. In the latter case, training was expected to result in improved employment competency. In the case of corporate clients, feedback was provided to the HR department. In some instances, where there were no complaints this was assumed to mean quality.

Conceptions of 'efficiency' are based on the shorter duration of the courses. Providers suggest that their provision is not only better, but also more efficient with respect to duration. Short duration of courses, however, cannot be indicative of efficiency in itself. It may be that short duration is more effective in terms of cVET but that this cannot easily be compared with the provision of iVET, which has far broader learning objectives.

In the quantitative study, 59 per cent of providers had no job placement programmes in place. There is no evidence to suggest that private providers are better able to provide work experience to the non-employed than public providers.

### **Conformance with legislation**

The extent to which providers have conformed to legislation has been a critical feature underpinning the study. Legislation has been directed at, on the one hand, weeding out unsustainable providers, and on the other hand enhancing the quality of provision. In terms of the current stipulations providers are expected to:

- Only offer programmes registered on the NQF;
- Not exceed enrolment that the facilities can reasonably be expected to accommodate;



- Provide adequate space, equipment and instructional material of a particular standard;
- Engage the services of the necessary academic and support staff with appropriate qualifications and experience to achieve the objectives of a particular offering;
- Implement a quality management system including assessment policies and procedures appropriate to the programme; and
- Maintain student records (adapted from DoE 2002).

While there was little evidence providing feedback about the institutional rationale for registration, the qualitative component revealed some interesting features for complying with official requirements. By far the most sustained reason for pre-registering and attempting to respond to official imperatives amongst all providers was the need for some official recognition to enable future survival and to prove legitimacy. While for some there was an inevitable need to ensure that providers conform to legislation for legitimacy reasons, there appeared also to be a more determined effort by some for-profits to acquire an institution number in order to secure large contracts which required official recognition. Those providers catering to the public saw in the pre-registration process a means by which to respond to the requirement by some fee-paying learners for official legitimacy.

For the not-for-profits, the rationale of survival was less significant, and there was a sense that the registration process was arduous, bureaucratic and unnecessary. While some in-house providers also considered the registration as a necessary bureaucratic hindrance, others saw it as an opportunity to re-invent the existing curriculum. The latter were often to be found represented on Standards Generating Bodies and were thus able to impact on the development of an alternative programme structure.

There has also been a considerable degree of confusion about the nature of the registration process. Some providers were unclear about which authority to use for registration. Some used what was the most relevant SETA, while others claimed that they had made extensive enquiries without success. The unevenness of SETA processes and their efficiency has meant that some providers have shopped around for the quickest route to accreditation rather than going to the most appropriate SETA. For instance, one provider who was training truck drivers was in the process of applying to the Services SETA, rather than the Transport SETA, because they were considered more efficient.

There was evidence that providers welcomed the conformance to legislation despite the increased bureaucracy that might result. Nonetheless, there was a sense that registration needed to be much more clearly defined and the respective roles of the DoE, Umalusi and SETAs made more understandable.

### **Programme purpose**

Private provision is clearly focused on the needs of the labour market. This singular purpose means that all activities are clearly geared towards this end, thus giving private providers a specific take on 'responsiveness' that is more closely aligned to industry needs. This also ensures that their goals are perceived to be closer to learner goals. Learners are clearly goal-driven, motivated by the need to secure access to the formal or informal labour market and therefore they expect programmes to deliver skills that are immediately useable.

This suggests that the objective of skills development is given a specific interpretation in the private sector. Programmes are expected to deliver on skill needs, to respond to some immediate objective, and to have some immediate functionality. Thus for learners the value of the training is questionable if the functional application of the skill is not immediately recognisable.

### **Nature of client**

Private FET providers have to sometimes engage with specific interests – the party to whom the training is directed is considered for purposes of identification as the ‘accountable authority’. This ‘accountable authority’ determines the nature of provision – not only what kind of programmes are appropriate, but when and what form provision should take. In the public education system, either parents of learners or the learners themselves represent the ‘accountable authority’ as they have agreed on the kind of provision in which they will be participating. This varies for different learner types in the private education sector.

For employed learners in either in-house or for-profit providers, the accountable authority is represented by the company division that has commissioned the training intervention, that is either the company’s HR division in the case of outsourced training vendors or the immediate supervisors of the employees in the case of in-company provision. They determine the nature of programmes and the times at which facilitation is to be undertaken if this is the preferred mode.

For the not-for-profit provider the accountable authority is represented by the funder or governing body. While the nature of appropriate programmes is often devolved to people who are operationally active, very little learner or community engagement is sometimes possible or even considered necessary. In this instance, the administrators take the role of ‘experts’ and determine what is required, with considerable impact on the centrality of the learner in the learning equation. Thus in the case of the ‘self-employment’ objective, the market for the products is sometimes located outside of the community, which threatens the viability of the self-employment initiative.

In the case where learners pay their own way, similar to the public technical college sector, the accountable authority is almost always a real or perceived labour market with which the provider is expected to engage. However, for public providers the issue of responsiveness needs to go beyond labour market responsiveness and incorporate national concerns as well (Unwin 2003). Thus in the private FET sector, the market serves not only to determine what is to be learnt, but how it is done and to what degree of sophistication.

In this way programmes are not only shaped by the complex nature of the labour market in the private FET sector, but also by the direct needs of the accountable authority. The accountable authority, therefore, in many cases determines the demand for, purpose, form and nature of programmes that are delivered in the sector.

As regards process, the limited time available and the need to ensure that particular content is covered suggests that there is very little opportunity to engage with the material. It is therefore difficult for learning to be consistent with the ‘constructivist perspective’. Learners are unable to engage with issues of purpose and thus interrogate

the more substantive theoretical elements of the content, which will make meaningful the impact of the skill being developed.

### Admission requirements

Table 6.2 shows the response of private FET providers to the issue of entry requirements. It suggests that only 38 per cent of these providers require a school certificate as an entry requirement. A large number of providers used either 'on-the-job experience' (32 per cent) or 'recognition of prior learning' (RPL) (30 per cent) as criteria for learner admission. This is especially interesting because the practical mechanisms for evaluating 'prior learning' have not been finalised. It may be the case that some learners attend private institutions because they are unable to attend public institutions owing to more stringent admission requirements. However, it is not clear as to what extent this is to be seen as a positive flexibility that is pro-equity or a market-driven disregard for the appropriate learning foundations being in place. In addition, there has been little evidence in the qualitative study to suggest additional support for those who are unable to cope with existing programmes.

*Table 6.2: Admission requirements at private FET institutions*

Admission requirements	Percentage
1 School certificate	38
2 On-the-job experience	32
3 Recognition of prior learning (RPL)	30
Total	100

*Source: HSRC 2002*

When corporate training was required, it was often left up to the financing authority to decide who was appropriately qualified. It was evident that on-the-job experience and the issue of skills requirements served as a powerful means by which to decide on entry requirements. In addition, since assessment practices were not exclusively in the written mode, verbal proficiency was considered to be more important than written expertise. Interestingly, it was also felt that the level of reading and writing proficiency was not sophisticated enough even to require matriculation level – the focus was on enabling the appropriate skills to be developed.

### Initial versus continuous vocational education and training

It is important to differentiate between initial and continuous vocational education and training to further identify the very different nature of learners and their contexts (see Section 5 on learners). iVET is considered the training required after an essentially academic schooling, while cVET is the training provided after the period of initial vocational placement. This has implications for the type of learners, the learning and programmes offered. The differences are illustrated in Table 6.3 below:<sup>9</sup>

<sup>9</sup> It might be worth remembering that these are ideal type formulations that have necessarily to ignore some of the complexity of the real world. It is a useful conceptual tool to understand different programmes offered by the different providers in South Africa at the present moment.

## PRIVATE FURTHER EDUCATION AND TRAINING IN SOUTH AFRICA

*Table 6.3: Distinction between iVET versus cVET*

Category	iVET	cVET
Predominant institutional base	Public colleges	Private providers
Personnel	Trainers with extensive theoretical expertise	Trainers with extensive practical experience
Learners	Post-school youth	Employed learners
Learner motivation	Access formal employment	Employment progression
Type of programmes	High cost and extensive range of courses	Low-cost and concentration on in-house equipment requiring less maintenance and infrastructure and consequently cost
Practical/theoretical mix	Predominantly theoretical with some practical hands-on work	Predominantly practical with some theoretical components
Admission requirements	Emphasis on formal schooling	RPL – as the predominant criteria
Duration	Longer (24–36 months)	1–7 days (up to 18 months.)
Mode of delivery	Instructor led-tuition	Distance and instructor-led
Predominant assessment	Written, with some practical component on course completion	Ongoing practical and verbal – project based
Programme development	Programmes developed at institution under (official) departmental guidelines	Programmes ‘in-sourced’ by private vendors or developed for particular purpose

There is evidence that the differences between public and private FET institutions can be described as variances in terms of both who they serve (that is, their learners), and the kind of programmes provided to suit particular purposes. Thus, for instance, the current focus of public institutions on post-school youth is in sharp contrast to that of the private providers with their emphasis on employed learners. This does not mean that there is an absence of not-yet-employed youth in the private sphere, but that the sector as a whole appears to be more responsive to the employed learners and to focus on continuous rather than initial VET.

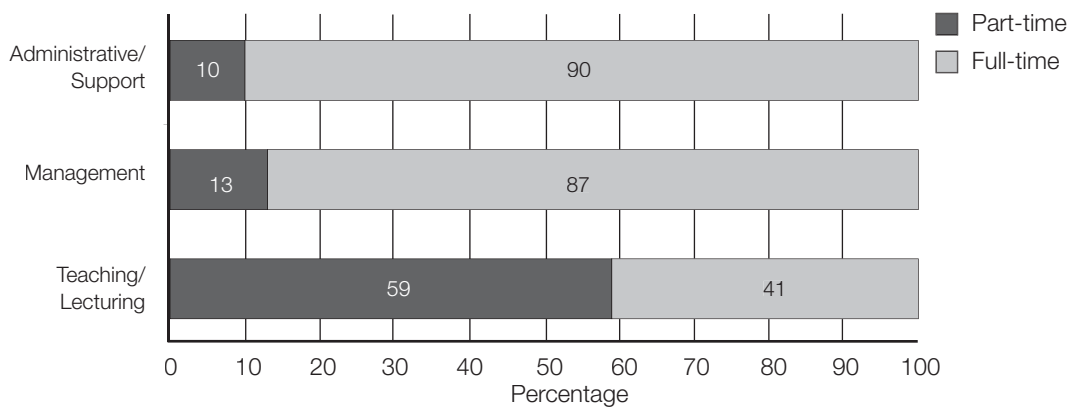
## 7 PERSONNEL PROFILE



### Employment status: full- and part-time

This study reveals that the majority of teaching staff are employed on a part-time basis (59 per cent), while the majority of management (87 per cent) and administrative personnel (90 per cent) are full-time (see Figure 7.1). It is evident that the full-time personnel take care of the day-to-day functions of provision. The part-time teaching component allows not only flexibility of provision in terms of tuition, but also allows for this to happen on a cost-efficient basis so that skills are borrowed from other sectors, both public (such as educational institutions) and private (workplace trainers) where private FET teachers are most likely to be employed on a full-time basis.

*Figure 7.1: Staffing ratio in private FET institutions - part-time and full-time staff per employment category, 2002*

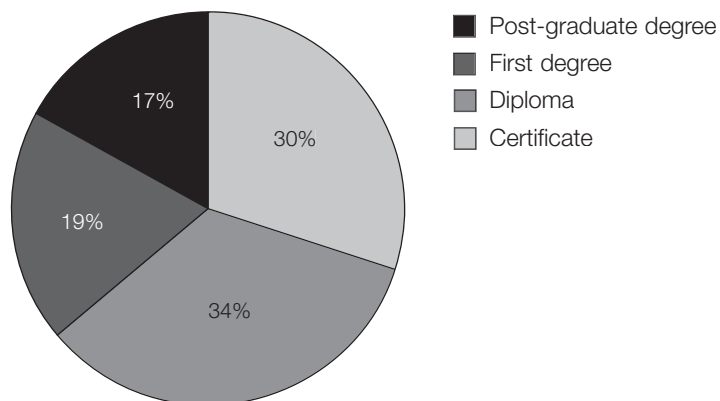


Source: HSRC 2002

### Formal educational qualifications

Figure 7.2 provides an analysis of the formal qualifications of staff at private FET institutions. It shows that 64 per cent of staff have either a certificate (30 per cent) or a diploma (34 per cent), while 36 per cent of the staff have university qualifications. Seventeen per cent have a postgraduate degree.

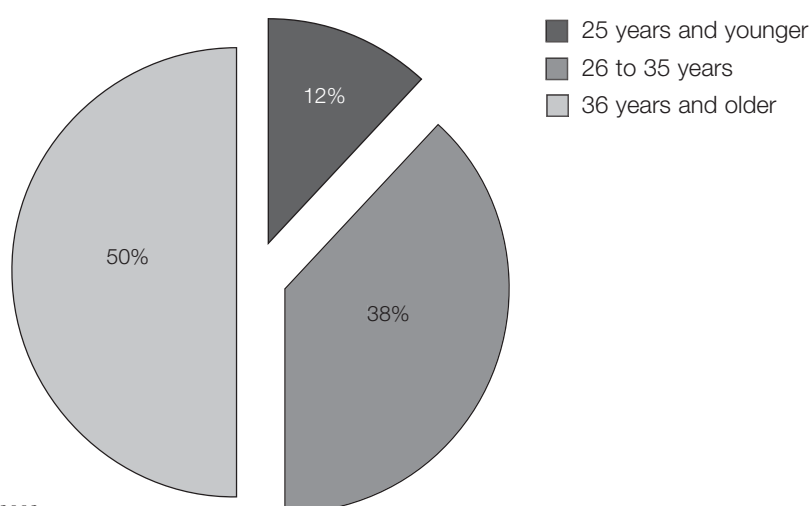
*Figure 7.2: Formal staff qualifications at private FET institutions, 2002*



Source: HSRC 2002

Providers in the private FET sector do not consider formal teaching qualifications as either necessary or effective in providing quality instruction. The extent to which this enables practices has, however, not been assessed. It would be necessary to explore more completely the experiences or the training expertise of staff to assess the adequacy of delivery. The practical experience of teaching staff within their vocational sectors can be considered an important determinant of their capacity to provide instruction appropriate to the market. However, the age profile of staff in the HSRC study (2002) reveals that 50 per cent of staff is in the 36+ age group, suggesting the likelihood of reasonable experience within their vocational sector (see Figure 7.3). As discussed, the nature of providers does not require formal teaching qualifications or expertise, unless specifically requested by the accountable authority. In some cases, students who had presumably done well and were graduates from the institution were given the opportunity to facilitate further learners. This is consistent with the characteristics of the sector that distinguishes, in some respects, between the various roles of the educator as programme developer, facilitator and assessor.

*Figure 7.3: Age profile of teaching staff at private FET institutions, 2002*



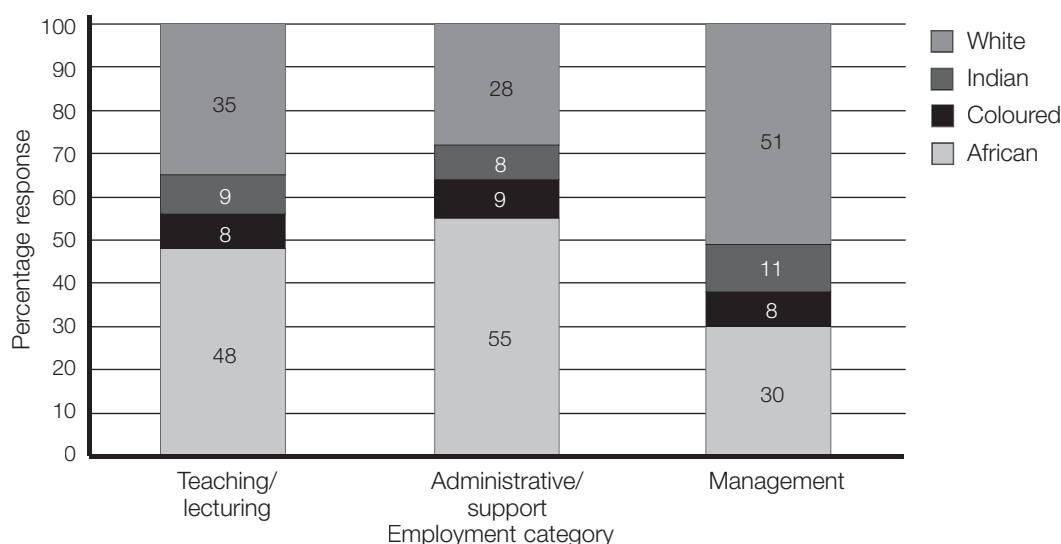
Source: HSRC 2002

## Race and gender

### Race

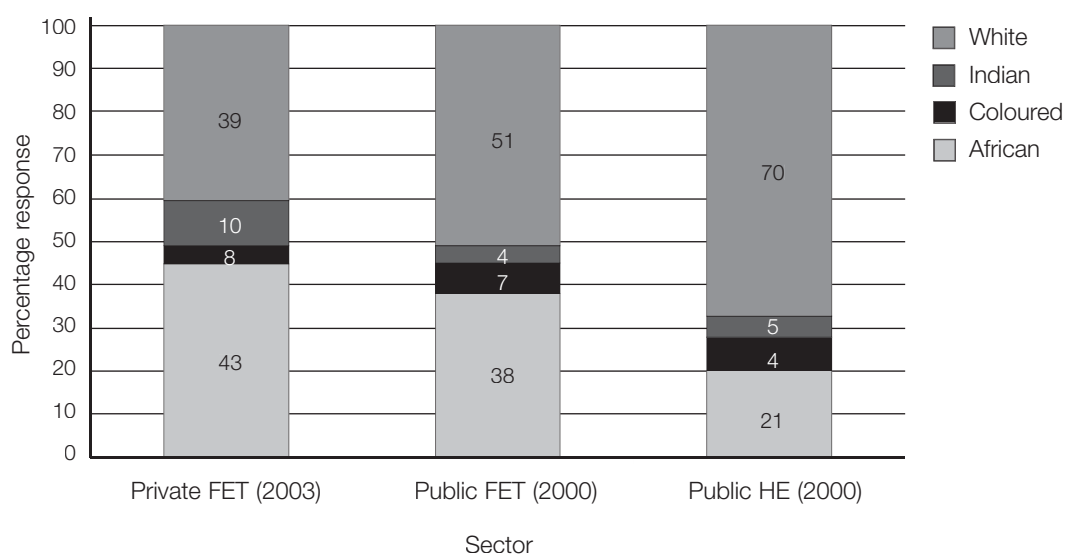
Figure 7.4 compares the racial profile of staff at various employment levels. Although there are more African teachers (48 per cent) than whites (35 per cent), Indians (nine per cent) and coloureds (eight per cent), there are fewer African managers (30 per cent) than white managers (51 per cent). This suggests that historical inequalities are still evident to some extent in terms of staffing.

## PERSONNEL PROFILE

*Figure 7.4: Demographic profile per staffing category in private FET institutions*

Source: HSRC 2002

However, if the teaching profile of the private FET sector is compared with the public FET sector and the public HE sector, there is evidence of significant racial diversity in private FET institutions. Figure 7.5 shows the highest proportion of African staff (43 percent) is in private FET as compared with the public FET and public HE sectors. However, it is important to remember that the private data is more recent than the public, and that staff demographics in the public college sector are very dynamic at present.

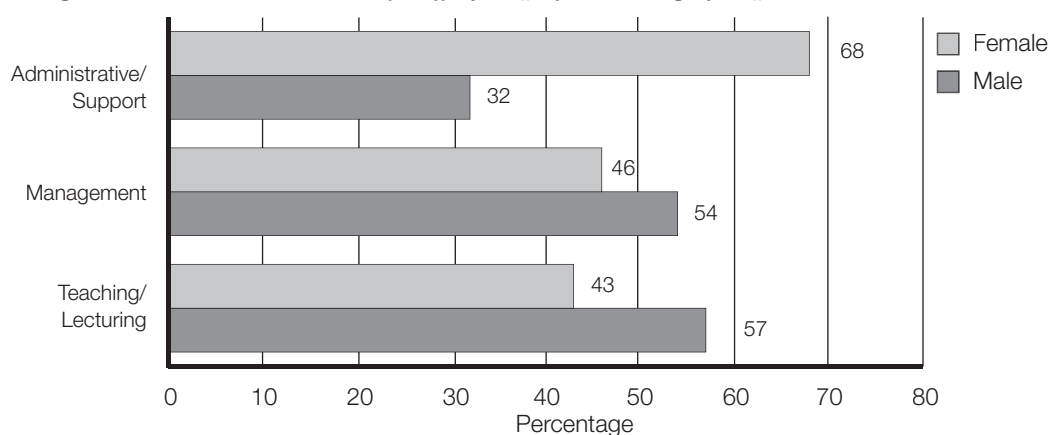
*Figure 7.5: Comparison of race profile of teaching staff at private FET and public FET and HE institutions*

Sources: HSRC 2002; Fisher et al 2003 &amp; Subotzky 2003a

## Gender

Figure 7.6 shows the gender distribution of staff in private FET institutions by the various employment categories. There is almost parity between the total number of men (48 per cent) and the total number of women (52 per cent) employed in the sector. However, men occupy 54 percent of management positions, while the administration component is 68 per cent women. There is a gender imbalance among the teaching staff, which comprises 57 per cent men and 43 per cent women. There is a need for the sector to address the current gender imbalances and respond to national priorities in this regard.

Figure 7.6: Gender distribution of staff by employment category at private FET institutions



Source: HSRC 2002

## Occupational stratification: blurring and specialisation

The kind of programmes offered by private FET providers, which are often 'in-sourced', suggests the need for a particular kind of individual for a particular purpose. It is for this reason that the kind of personnel required for facilitation is not expected to be well-versed in curriculum development issues. This justifies the use of both managers and ex-students for facilitation purposes. This also allows for extensive use of experienced personnel from business and industry for course delivery. The latter are clearly expected to enhance course material with anecdotes from their own experience. Thus, providers in this sector require people who are at least able to mediate the learning material. This means that the services of a vast number of ex-teachers would be particularly useful for the delivery of softer skills, especially computer- and business-related. This kind of requirement also presupposes a particular notion of knowledge that is required of facilitators, which is different from that required of educators in terms of national 'minimum standards' (DoE 2002).

It is evident that the 'in-sourcing' of pre-packaged skills also provides a niche market for another type of expertise for the purposes of facilitation – that of the technical specialist. This is especially so when learning is mediated by ICT technologies. Thus for pre-packaged computer-related teaching programmes (such as the International Computer Driving Licence), an assistant *au fait* with the technical aspects of computing is often used to 'double up' for facilitation. Providers considered this an efficient deployment of personnel as these individuals would be able to deal with problems of a technical nature



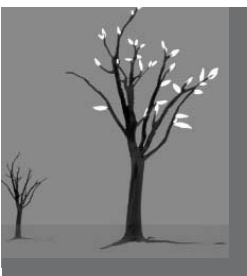
when they arise. The implication of this personnel deployment for effective and relevant programme delivery, however, still needs to be assessed.

The need for a specialist with facilitation expertise is therefore mitigated in this sector. This also explains the formal qualifications of staff. This is borne out by numbers of teaching personnel with formal qualifications acquired presumably in the public system – only 34 per cent of staff in this sector have degrees. Thus it was considered that for the provision of pre-packaged course material even an individual with rudimentary facilitation skills would prove more than adequate.

In contrast to this finding, there were some private providers that allowed for a degree of specialisation of personnel unlike that found in the public sphere. One for-profit provider that developed courses for particular corporate purposes ‘in-sourced’ the services of a specialist researcher and programme developer whose task it was to customise programmes for client needs. In this case, modules were comprehensively compiled for both learners and facilitators.

In order to ensure quality, the kind of checks and balances in place resemble that of a manufacturing process. In some cases, modules designed for face-to-face instruction specify in significant detail what skills are to be acquired, and outline in the minutest detail all that facilitators are expected to engage in. So, for example, some learner and educator manuals identify: possibilities for the initial ‘ice-breaker’ designed to enable effective communication amongst participants during the session; what should happen during breakaway sessions; and assessment tasks set for learners. The resonance with the franchising and subsequent ‘commodification’ of education therefore cannot be ignored, although its purpose is to guarantee consistency with the need for uniformity of provision and quality enhancement.

The attention to developing extensive manuals specifying exactly what skills are to be developed is a peculiar feature of the sector. These serve not only as evidence of what is to be provided for recording purposes, but also represent the product of the mediation between institution and accountable authority. It is this feature which enabled at least one for-profit provider in this study to speak of provision in terms of ‘back-end’ and ‘front-end’ parts of the business operation, where back-end represented the operational side (including the programme development and facilitation), while front-end referred to marketing and liaison with clients, in this case corporate clients. The separation of these features suggests that the actual curriculum is decided outside of the educator-learner relationship – suggesting a particular role for the personnel involved in the relationship.



## 8 CONCLUSION

This HSRC study provided the first account of the size and shape of private FET provision in South Africa. Provision appears to be strongly user-driven and informed by high learner interest, particularly amongst those already employed. The study has shown a heterogeneous sector in which provision sometimes exists outside of the brick-and-mortar reality of public provision.

This study has found evidence that this sector is large enough to be considered seriously in any effort for national skill development initiatives. The current size of the sector – 706 884 learners – suggests that it can play an important role in supporting the achievement of national development goals. The fact that most institutions are located in the areas of Gauteng, KwaZulu-Natal and Western Cape reflects the predominantly urban user-driven nature of provision.

The typologies identified by Atchoarena and Esquieu (2002) – for-profit, not-for-profit and in-house – have been used as a starting point to categorise provider types in the sector. Nuances to this categorisation have been identified in each of these broad groups. The for-profit sector is also associated with a degree of specialisation based on their clientele. Some for-profits specifically target the general public, while others target the corporate market. Those that do both generally have separate units to engage these target markets. The not-for profit group is distinguished by its particular focus on social development – sometimes run by religious organisations or by companies as part of their community development initiatives. There is evidence of some international donor support for this group. The in-house provider is associated with a clearly defined mandate to ensure skills development for employees for the benefit of both the company and the individual. Some in-house providers fulfil the key task of delivering training linked to the complexity of their business product, and this group is more comfortably categorised as for-profit. Other in-house providers provide training as part of their corporate responsibility programmes.

The presence of a large for-profit component (80 per cent) in the sector suggests a strong element of supply-led and user-driven provision. Programme specialisation associated with increased institutional growth in the 1990s is explained by two mutually reinforcing trends, one global and the other local. The global phenomenon of ensuring that programmes need to articulate with the labour market is complemented by the qualifications-based NQF which expects that the linkage between education and the world of work need to be more direct. This has created a niche market for providers to offer a variety of programmes for particular employment needs. For out-of-school youth this has created the perception that there are particular employment gaps that need to be filled, while employed learners appear to feel the need for these programmes to respond to particular skill needs.

The novel approach of contact and distance delivery of material, often integrated, is an important feature of private provision. The study has shown that private provision has not been overly dominated by distance modes and has shown the indispensability of face-to-face contact tuition. However, the appropriate balance between contact and self-taught material needs to be maintained.

While there was awareness in the sector that providers need to be responsive to the market in order to ensure their survival, very few providers reported that they had established links with industry and business to secure employment for learners. The high proportion of learners who pay their own way indicates that this sector is largely

## CONCLUSION

user-driven, with learners believing that their newly acquired skills will be marketable. Whether this is borne out in reality is unknown at present, and this issue needs to be interrogated in future research.

The programmes of most private providers are of shorter duration than their public counterparts, ranging from one to seven days to less than 24 months. There is also a tendency for private providers to present programmes that are less capital-intensive, requiring only facilitators in some instances.

In general, curriculum is a pre-packaged phenomenon, normally 'bought' from outside vendors, called programme 'in-sourcing'. Where programmes are developed internally, use is made of curriculum specialists who are involved in extensive development of written manuals for learners and facilitators. The relevance of programmes purchased internationally needs to be assessed in the light of the significant skills and linguistic deficits that need to be addressed in the post-apartheid context.

Most learners in the sector are African, male, over 25 and likely to be employed. Learner types discerned in this study include out-of-school youth, 'recently employed' and 'employed learners'.

Learner types determine not only the programmes offered, but also when and where provision takes place. Where the employer commissions training, learners were catered for at times outside of working hours and at venues suitable for the employer, either at their place of employment or an alternative venue. Venues for out-of-school youth and those recently employed, on the other hand, are normally located in premises supplied by the provider with training taking place during normal working hours.

Learner motivation is also different for different categories of learners. For employed learners the need for improved employment opportunities, either within or outside the company, is important, while for out-of-school youth the need to access formal employment is an important motivation for accessing provision.

Employed learners are often able to source the 'best' provider. Out-of-school youth and the recently employed, on the other hand, are not as fortunate as regards choice and often opt for the 'cheapest' vendor available. It is in this arena that 'fly-by-nights' are to be found and consequently this is the point at which state protection is most required. Such learners access the sector because they are either unable or unwilling to access the public FET system.

In most instances teaching staff is employed on a part-time basis. While there is gender parity in terms of total staff employment, there are more men employed in teaching and management than women, whereas women constitute the majority at administrative level.

While the sector has shown clearly the useful deployment of experience and skill in programme delivery, there does appear to be a need for skill upgrading in the sector in line with national educator guidelines. There is, for instance, a need to improve the facilitation skills of those employed in the sector to ensure that programmes are not only consistent with the particular skill needs of the occupation, but also with those values considered appropriate for effective citizenship, outlined in the NQF as core

competencies. Including these competencies on paper qualifications, however, is no guarantee of these being actively included in programmes.

Task-oriented training is an important feature of provision. Important insights were uncovered regarding the relationship with the new legislative regime. While in some cases there was a sense of conformance for survival, in other cases there was a need to adhere simply as a necessary bureaucratic procedure. In yet others, there was a sense that legislation provided a degree of coherence to a system that needed to be reformed. It is evident that there is some confusion associated with the new legislative order as regards relevant authorities and lines of responsibility. The development of a coherent national administrative registration system is needed if policy intentions are to be realised.

The sustainability of the sector will depend on how the state responds to sector needs and sets about regulating its growth. The key features that will presumably ensure sector growth include levels of responsiveness to market demand, institutional sustainability, programme flexibility, articulation with public sector providers, and labour market conditions. The ability of the sector to compete with the skills training initiatives of other components of TVET will also determine future growth. It is contended that those most vulnerable are those that respond to the most disadvantaged communities. The sustainability of these providers should be an important area for future policy direction.



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