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Transforming the Labour Skills Arena in South Africa : The International Dimension

Michel Carton et Kenneth King

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Transforming the Labour Skills Arena in South Africa: The International Dimension

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Background and Main Findings

The idea for the following study, written in 2000, derived from a request by the South African Department of Education to one of the authors to look at the role of international development co-operation in relation to the education sector in South Africa in 1996 (King 1996). The conclusion of that activity suggested that South Africa could provide valuable insights to the policy community more generally, and particularly in the related Training Sector, associated with the Department of Labour. What was especially suggestive for external donors looking at the New South Africa which was beginning to emerge even before majority rule was achieved in 1994 was that the new planners were very clearly emphasising many of the priorities that had recently become so central to the development assistance community.

Thus, South Africa illustrated the key importance of national policy development and national ownership of the policy development process. Also, long before the idea of Poverty Reduction Strategy Papers (PRSPs) were developed by the World Bank, with their very strong emphasis on the need to consult with a multiplicity of stakeholders, South Africa had been a shining example of the consultative process in action with civil society. For instance, their new education and training policies had been developed in the very early 1990s in a highly collaborative process which was termed the National Educational Policy Initiative (NEPI). At a time in this same period of the early 1990s, when UNDP,[1] DAC (OECD),[2] the World Bank and other bodies were underlining the importance of national capacity building (OECD 1991; King 1991), and the danger of over-reliance on external technical assistance, South Africa seemed a powerful example of exactly what Japan had sought to do after the Meiji Restoration of the mid-nineteenth century – seeking out relevant external knowledge and capacity – but selectively adapting and incorporating those global trends into their own national requirements. In other words, South Africa seemed a persuasive demonstration of the axiom 'Scan globally, reinvent locally'.

South Africa also illustrated, so very clearly in the early and mid-1990s, a policy determination to innovate and reform. This, of course, had been driven by a determination to move dramatically away from the apartheid legacy. But what it meant in practice was that South Africa was able seriously to contemplate radical transformation in the education and training sectors. Many years before countries such as England and Wales had sought to integrate Education and Training into the same ministry – the Department for Education and Skills (DFES), South Africa had launched a series of key policy initiatives which were founded on the assumption that the once separate Education and Training sectors needed to be reconstructed as a single system of provision and qualifications. Equally, the timing of South Africa's reconstruction and reform coincided with new thinking in the OECD countries about a concept of 'skills development' that went beyond the older work-related technical and vocational skills of earlier decades.

One of the most significant shifts in support to training has been at the level of language. In 1990 the basic term used was still that of 'technical and vocational education and training' (TVET – or sometimes just 'vocational education and training' [VET]). Now there is an increasing use of the term 'skills development' (SD). This is

[1] United Nations Development Programme.

[2] Development Assistance Committee (Organisation for Economic Co-operation and Development).

reflected in the name change of the donor co-ordination group in this area – the Working Group for International Co-operation in Skills Development (WGSD) – and in the SDC,[3] DFID,[4] World Bank and Danida[5] shift in their policy papers and policy development from VET to SD.

This shift in language reflects a move of deeper significance. Part of the effects of globalisation has been to bring about a rethinking of the nature of both knowledge and skills. Both these 'outcomes-oriented' terms have become relatively more important in policy and practice. At the same time, the more 'input-oriented' terms of education and training have seen a relative decline in usage. The notion of training was linked to a narrow range of sectors and levels of employment. It was linked to separate institutions or seen as a distinct part of schooling. In either case, it was seen by many as lower status than education. It was typically to be done in youth or early adulthood. It formed part of the transition to both adulthood and employment. However, this was not universal and the transition also had strong class and gender dimensions. In India it was closely tied up with caste; in South Africa, with race.

The 1990s saw a softening and broadening of the notion of skills. Skills are now seen as important because they are part of education's role in labour market preparation. Thus, we see an emphasis on problem solving, communication, teamwork and other 'core' skills. The growth of information and communication technologies (ICTs) has led to an increasing focus on skills relevant to this area. Even in technical areas there has been growing attention to the softer elements of design, and attempts to include more 'generic skills' in the organisation of specialised, technical apprenticeships (e.g. in Germany and Switzerland). Rapid technological change has reduced the weight given to pre-service training. Instead, notions of re-skilling and lifelong learning are given greater priority. Technological change also has encouraged a narrowing of the divide between education and training. This has led to the emergence of a common discourse about life skills, core skills, or generic skills that are to be found both in school systems and in national training provision.[6] The sharp division between education and training makes less sense within the post-industrial emphasis on services over production. It also has reduced relevance when the stress even in the productive sector is on becoming 'cleverer' and more 'knowledge-intensive' in order to be globally competitive.

These trends have been largely confined to the OECD and Newly Industrialising Countries (NICs). However, they have come to shape the understandings of many policymakers and practitioners working in the developing world, both in agencies and their partner organisations. This has nowhere been more evident than in South Africa. The political requirement dramatically to shift from the racially-defined technical skills of the apartheid era fitted in well with new thinking about constructing an inclusive human resource development system.

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[3] Swiss Agency for Development and Co-operation.

[4] British Department for International Development.

[5] Danish Agency for Development Assistance.

[6] See for instance the WGSD's focus for 2003 on 'Life Skills: A Bridge between Education and Training'.

The Challenge of Change

The last decade of the twentieth century witnessed a dramatic series of changes in the architecture of skills and of training policies in South Africa. The first year of this century has seen key elements such as the skills development levy and the sectoral authorities responsible for education and training being put into place; there will doubtless also be an increasing number of initiatives involving the development of learnerships and skills programmes – as the new training standards begin to spread and to be adopted in many different economic contexts.

The skills revolution is a crucial part of the reconstruction of South Africa. It is seen to be central to facing the challenge of globalisation, to reversing the shedding of formal sector jobs, and to making more competitive the untapped potential of both rural and urban micro-enterprises. Like the parallel reform in the education sector, the training reform has had to face two ways; for the majority black population, it had dramatically to redress the legacy of the decades of job segregation and exclusion from skilled worker status; and at the same time it has had to accompany an industrial and commercial restructuring made necessary by trade liberalisation and the rapid removal of protection. These in turn, as we shall see, have resulted in a very substantial rise in unemployment at the very time that aspirations for more rewarding work have been kindled by the end of political apartheid.

Both the education system and the training system have sustained far-reaching organisational and structural reforms, but, understandably, in both cases in the last years of the previous century the very currency of their curriculum content has been radically rethought to fit the new South Africa. Hence both the schools and the training systems have to absorb and digest new ways of teaching, learning and assessing that differ starkly from the traditional. This dual challenge would be a tall order for any society. It is doubly so, when the revolutions have to encompass a curriculum for competitiveness[7] and a curriculum of national inclusion.

The architects of these massive changes have been South African. The series of Green and White Papers that underpin the reforms are some of the most thoughtful and persuasive that have appeared in any country emerging from minority or colonial rule. But what this present paper wishes to explore is one relatively small element of this whole canvas of change, and that is the role that international co-operation and assistance have played in support of the labour skills revolution.[8]

In approaching this topic, we are aware that by the time that official development assistance was finally available to the new South Africa, many of the bilateral and multilateral agencies – as well as the Northern non-governmental organisations (NGOs) – had had some 30 years of experience of assistance in many different political environments.[9] Over time, their own strategies and policies had changed substantially. Inevitably, the offer of official aid to South Africa was conditioned by the learning experience and the knowledge base of the agencies in the mid-1990s. But we shall argue also that the final shape of the training world-as-aided in South Africa was materially affected by the particularity and diversity of the skills development history

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[7] The idea of a 'curriculum for competitiveness' is developed further in Afenyadu et al. 2000.

[8] It is anticipated that there will be a parallel study carried out by colleagues in the University of Cape Town and the University of the Western Cape on the role of international assistance to the education sector.

[9] This is not to say that aid had not been available to South Africa prior to majority rule in 1994, but that aid to NGOs, trade unions and other civil society organisations had been provided under very different circumstances. See King 1999.

of South Africa itself and by policy people in many different constituencies in that country.

We shall look at the special challenge of South Africa to the donor community; the way that the South African government has itself sought to analyse external co-operation, and then a variety of ways in which support to skills training has been developed with external assistance.

The Particularity of South Africa

Analysing international co-operation with South Africa in the field of skills development over the last decade cannot be carried out in the same way as has been common in other 'aided' countries. Without even referring either to the middle income status of South Africa according to international economic development standards or to its continuing dual or triple society character, the apartheid heritage would in itself confer on South Africa a unique position. The very fact that President Mbeki's state-of-the-nation speech, of 4 February 2000, could explicitly refer to some ongoing brutally racist tendencies in the country demonstrates that the political changes of 1994 may well take decades to modify the economic and socio-political face of South Africa.

It is in such a context that any consideration of the history, the present situation, and the future perspectives of international co-operation with South Africa has to be made. We can accordingly raise some key issues concerning the ways that the aid actors may have taken into account the uniqueness of the South African context when defining their policies, partners, instruments, timeframe and modalities of aid. This task must surely have been difficult, since the specificity of the aid challenge in South Africa is bound to have been affected by the numerous developments that the aid and co-operation agencies have been involved with elsewhere in recent years. A selection of these changes should be mentioned as they may have made more complex the aid response to the peculiar challenge of South Africa:

- The growing importance of the poverty agenda to aid donors, and their attempt to accommodate the often-conflicting objectives of growth-oriented development with the reduction of socio-economic inequalities in the South
- The necessity of reaching a certain level of coherence amongst the different policies of Northern governments relating to the South – and not least the portfolios of foreign affairs, private investment and international trade policy, and aid policy (Forster and Stokke 1999)
- Strong pressures to marketise the aid budgets outside the agencies through competitive bidding procedures amongst Northern consultants

Implementing all these innovations in aid projects and programmes has proved far from easy:

- The poverty agenda is more difficult to translate into specific programmes than to formulate as it reveals some tensions between its ideological and technical dimensions (King and Caddell 1998); furthermore, concerns have been expressed about the knowledge and skills capacities of some agencies to deal with this agenda (DAC 1999)
- The coherence objective can be resented by the development co-operation-oriented agencies and staff (who are increasingly integrated into the Ministries of Foreign Affairs of their respective countries) as a way to undermine their specific

'development' objectives and integrate them in the new global economic world order[10]

– The marketisation of aid has tended, in some cases, towards a capacity reduction in the agencies themselves both at the central and local levels. Consequently, despite the widespread agency emphasis on knowledge management at the institutional level (King 2000), their own individual knowledge creation and capitalisation are lacking for coping with the often changing process of definition of their policies and strategies, both in general and in specific countries. Furthermore, the technical assistance market, which is developing in the South, contributes also to a parallel 'capacity-debuilding' process in the national administrative, training and research organisations with which aid has to work

Having to face all these challenges, the agencies at work in South Africa must surely also have been obliged to confront these with the unique situation of the country, i.e. the devastating consequences of apartheid in the short, medium and long term. There is an intriguing question to be asked about the assessment the agencies must have made of the country situation before launching their aid programmes. Different hypotheses could be suggested about the content of any such assessment.

Despite the South African situation being unique, some agency policies and programmes have probably been based only on a light adaptation of those already tried and tested in other countries, since the costs of an ad hoc new approach would have been too high. Consequently, in some respect, the traditional discourses, policies and strategies may have largely been called upon with a minimum reference to the above-mentioned new trends or to the specificity of South Africa.

When looking at the numerous agencies intervening in the education and skills development fields, one could then construct two scenarios reflecting the adjustment of aid to South Africa. If we look more specifically at education and democracy as being two of the areas most devastated by apartheid, these two fields could be situated at either end of a continuum reflecting the vision the agencies had in mind after 1994 for the future of South Africa.

If one considers that the uniqueness of the country could rapidly diminish – thanks to globalisation – and that education could be one of the main instruments to deal with poverty, then aid to the devastated South African school system would become a major priority in all respects (social, political, ethical). Furthermore, the priority given by most agencies since Jomtien to basic education and the knowledge acquired over several decades in some of their large education projects provide the ground for intervening in this sector. More generally, the high-level political commitments made by the agencies to South Africa have also provided the immediate financial justification for support to education. In this scenario, a largely supply-driven approach could thus be applied for tackling a national situation the specificity of which is minimised.

At the other end of the continuum, arguably, the top priorities for a post-apartheid country must be to set up the institutional and technical instruments which could contribute towards returning to a 'normal' civil society (justice and police reform, institutional restructuring), to the construction of a nation and to the quest for foreign investment. In this scenario, a more demand-driven approach would be used;

[10] The Sida (Swedish International Development Agency) case is fascinating as the coherence concerns have been explicitly tackled in two reports dealing with Africa and Asia but, at the same time, challenged in South Africa when the aid and trade agendas were combined during a high-level visit at the end of 1999. See Ministry for Foreign Affairs, Sweden, 1997, 1999.

and the emphasis would be put on the human and institutional development dimensions of aid for setting up of a new governance mode adapted to the specificity of the country.

If these two situations reflect the extremes of a continuum, one can suggest that the country policies which have been produced by a good number of agencies do in reality reflect something of a compromise between them.

This view is in some way confirmed by the *Overview of Official Development Co-operation Programmes in South Africa* produced by CIDA (Canadian International Development Agency):

> Education and human resource development appears the sector of greatest priority among donors, as evidenced by the fact that all 18 [agencies] profiled in this report are involved, in one way or another, in education, vocational training and activities related to human resource development. Democracy, human rights/justice and good governance are the second most important priority among donors in terms of participation. It is not clear whether donors, in aggregate, spend more money in education or in democracy, human rights and governance. However these two sectors form the biggest areas of spending by donors. (CIDA 1999: 5)

Of course in the real world of agency choices about investment, it is not a question of supporting education *rather* than measures to support directly the democratic process, in a post-conflict setting. Most agencies' country strategies for South Africa propose to support both democratisation and human rights, along with education and training. Thus, *Danish Transitional Assistance to the Republic of South Africa* makes very clear that democratisation is Denmark's first aid priority, and the detail of its programmes and projects makes plain how important is the unique legacy of South Africa (see concerns with the prevention of violence, human rights, conflict resolution and victim aid). But inseparable from support to democratisation, and the allied programme of land reform, are very strong commitments to education and training, and to black business and employment. Indeed, the financial commitment to the last programme was larger than any of the other three (Danida 1998: 15).

The EU would add a further dimension to the mix of donor decisions, with its three-fold aim – of poverty alleviation, better integration into the world economy, and the consolidation of human rights and democratic processes (EU 1999: 6). It is interesting to note, however, in the current draft of its 'Country Strategy Paper for South Africa, 2000–2002', that support to education and vocational training 'should not be retained as an area for major programmes in 2000–2002' (ibid.: 7). This is an intriguing position in view of the major support to labour market skills development (see below).

Interestingly, DFID's 1998 *Country Strategy Paper: South Africa* is concerned with three areas: promoting sustainable livelihoods; better education and health; and better management of the environment. There is in fact a human rights and justice dimension in the first area, but its positioning has nothing of the salience accorded to Danida's transitional assistance programme.

A final example would be from the German Technical Co-operation Agency (GTZ), which delivers bilateral co-operation on behalf of the German government. Of the six areas of co-operation now agreed, it would appear that technical and vocational education and training (TVET) is one of the core concerns, and there is no explicit concern with democracy and human rights, but rather with public and administrative advisory services (GTZ 1997: 9).

But as we move now to look more closely at support to skills development, we shall note that because it straddles so many concerns – from historical exclusion to integration, from unions to informal sector, and from employment (and

unemployment) to international competitiveness – it is an area that in some ways connects the two sides of our continuum.

From Policy Formulation to Implementation: Challenges for South Africa and the Agencies in the Area of Skills Development

The previous discussion can now be used to underline the specific nature of the relations amongst national stakeholders and with international partners, which has been crucial for the preparation of the conceptual framework of the skills development policy, structures and instruments. This specific nature has strongly influenced the maturation and formulation process of a policy, which has been innovative, complex, and system-wide.

At the national level, the way the relations amongst employers, trade unions and the government will evolve in the new socio-economic context the country has been faced with since the June 1999 elections will strongly influence the take-off and implementation of the skills development policy. This take-off will depend on the willingness and capacities that the organised employers and employees (representing the 'modern' component of the work force) are ready to mobilise in favour of the tripartite management of this very complex training system. The success of the skills development policy will also depend on the organisational process that the 'informal' part of the work force might enter into during the next decade (not to mention the 35% to 40% of the work force which is said to be unemployed).

This situation is likely to influence agency decisions concerning the length, the nature and the amount of their support to skills development. And in turn these will depend on the analysis the agencies are going to make of the recent changes in South Africa, i.e. the knowledge base they are going to work on vis a vis the changing nature of the socio-economic situation of the country since the last elections. This most recent situation contrasts with the previous period in many respects.

The macro-economic policy of South Africa has altered substantially even in the short period since majority rule, and has been seen by many to be emphasising growth over poverty and redistribution. This trend has been intensified after the last elections in June 1999, and has tended towards a reformulated role of the state, following a more neo-liberal facilitative approach rather than a directly interventionist one (Barell 2000). Consequently, the processes of deregulation, privatisation and outsourcing have already started to hit the interests of some social actors like the trade unions, despite their being involved in a political alliance to support the government for the next five years. The process risks also affecting the numerous categories of the population (but especially the African majority) who had been expecting from the government the quick delivery of different basic public goods (Nxumalo 2000).

The aid agencies are thus faced in South Africa with the same type of issues as some which have been discussed for more than a decade in their home countries. Their policy concerning South Africa will then depend on their own national political context as well as on the way they are managing the new aid trends (poverty, coherence, aid versus trade, etc.) which we mentioned earlier.

The field of skills development is obviously strongly affected by these ongoing national and international changes. From 1994 until the launching of the levy-based Skills Development Fund in April 2000, the skills development policy, in all its different aspects, has depended largely on the state's support and direct role in the

functioning of the system through the Department of Labour at central and local levels. Yet the newly launched system is clearly also of a tripartite kind, and reflects the strong influence of the employers and employees' representatives in the numerous structures which are being put in place, from the top to the field levels.

The launching of the Skills Development Fund-financed training activities as well as the running and credibility of the system will depend consequently on the strength, the will and the capacity of *all* the stakeholders to play the new game. The ongoing debate about the different roles of the trade unions in the political and economic spheres, about the capacities of the administration to deliver and about the willingness of some employers to stick to the equity and black empowerment policies adopted since 1994, will influence the critical, first steps of the system's launch. And it is not certain that skills development will continue to be a common interest for all these parties.[11]

The government as well as the agencies have then to decide whether they want to provide the long-term institutional support allowing the financial and managerial sustainability of the training system, even though the latter will increasingly have at its disposal its self-managed fiscal resources through the Skills Development Fund. As far as the agencies are concerned, this situation fits very well with their on-going discourse on the importance of human and institutional development. But equally the success of the levy fund will allow agencies to argue that their initially critical support should become sustainable.

Before we turn to the detail on some of the specific external support to skills development, we need to locate this area of labour market skills training within the South African government's own attempt in 2000 to analyse aid flows across a number of key sectors.

Development Co-operation Reviewed

We have looked at some aspects of the agency vision which in the early 1990s had reached a number of general conclusions about its major priorities. We have suggested that these may well need adjusting in the changing economic circumstances of South Africa in the late 1990s and the early 2000s. We shall now mention briefly South Africa's own initiatives in the analysis of external aid. Then we shall look more closely at external support to skills development.

In the years immediately prior to majority rule in 1994, the UNDP had carried out a *Development Co-operation Report for South Africa* (UNDP 1993). It is probable that the UNDP would have liked to continue with this task of monitoring on behalf of the government the flows of external assistance to South Africa (as it has done in many other countries). However, the new government set up its own mechanisms for development assistance to enter the country, first through the Reconstruction and Development Programme (RDP), and then, from mid-1995, through the International Development Co-operation (IDC) directorate of the Department of Finance. External

[11] In fact it has been shown in other countries which have put in place some comparable apparatus (e.g. France, since 1971) that it takes at least ten years to make it work, through an empowerment process which develops a culture of training in the minds of actors who may ordinarily be more concerned by wages and work conditions (trade unions), productivity increases (employers) and administrative rules (government).

agencies, and in particular the UNDP, found the new mechanisms very cumbersome and time-consuming, and some agencies felt obliged, unwillingly, to resort to complicated, non-government modalities in order to get support to South Africa (King 1999). The government was also certain that it would itself deal with the monitoring and reporting on aid flows. However, it was not until May 1999 that there was a new report available, commissioned by the UNDP and the IDC, and this covered the whole period 1994–1998 on which there had been a complete absence of reporting.

This document (IDC 1999d; hereafter referred to as DCR I) provided very summary accounts of assistance to each of fourteen sectors (from Education, to Housing, to Private Sector Development). Labour Development was included, but with no indication of aid flows and with only two or three paragraphs on each of the fourteen sectors, there was no scope for detailed analysis of any trends. In fact, all that was said of aid to labour development in South Africa was that it was aimed at stabilising labour market relations, and that it had included a concern for workers falling outside the scope of organised labour (IDC 1999d: 17).

A much more analytical account was available from the same team of consultants, in the form of a Research Report of the Centre for Policy Studies in Johannesburg (Bratton and Landsberg 1999), but this made no mention of labour development at all; indeed the fourteen sectors were reduced to just six, and labour development was excluded from their tabulations completely.

For a variety of reasons, including a lack of sufficiently detailed and accurate data at the sectoral level in DCR I, UNDP and the IDC decided that a second phase of the review of development co-operation (DCR II) should be undertaken and, this time, be completed by early 2000. This was a very much more ambitious initiative than the first. It was designed to cover four cross-cutting themes (e.g. Gender and Environment) and six sectors, amongst these Education, Small, Medium and Micro Enterprise (SMME), Development, and Labour. The overall terms of reference indicated that Education would include primary education, adult basic education and training (ABET), schools building, and vocational training, while Labour would cover 'specifically the Labour Market Skills Development Programme'. From our point of view, this would have meant that skills development would have received attention both in respect of 'vocational training' through the Education sector review, as well as through the Labour sector.

In the event, the more detailed terms of reference for the Education sector specified that the sub-sectors to be explored should include primary education, schools development and ABET. There was no longer any mention of vocational training.[12] And, initially, because of pressures of design and implementation of its own main projects and programmes, the Department of Labour felt it could not collaborate on the review of the Labour sector. In combination, these decisions would have meant that in the final report of DCR Phase II, there would have been no extended discussion of external assistance to skills development, though the essential figures on aid to this sector would have been captured in the statistical data base, which is another of the elements in DCR II.[13] However, very late in the whole process, agreement was reached that there could be a review of aid to the sector of Labour, after all, but, as indicated

[12] Just before the Education sector study commenced in February 2000, 'National Qualifications' was added to the areas to be covered. This would clearly mean that aid to the South African Qualifications Authority (SAQA) should also be covered.

[13] The data base project is intended to involve the 'collection of comprehensive, disaggregated, accurate and usable data set of ODA [Official Development Assistance] to SA [South Africa] covering the period April 1994–March 99 and incorporated in IDC-PMS data base'.

above, this would concentrate on the large European Union support to the Labour Market Skills Development Programme in the Department of Labour.

It is not only the UNDP/IDC that have been seeking to put into place better data on development co-operation. A few months after the publication of DCR I, CIDA published its own synopsis of aid to South Africa under the title *Overview of Official Development Co-operation Programmes in South Africa* (CIDA 1999), which we have already referred to in passing. The CIDA document only looked at six main sectors, including 'Education and human resource development'. It noted that this umbrella term covers a great deal of donor activity, and that this is the single largest recipient of donor funding. Skills training is apparently included in this domain, but aid to skills development does not emerge at all clearly from the summary two paragraphs on this 'Education' sector. Indeed a casual reader would probably conclude that the Department of Education at the national and provincial levels is the principal beneficiary of aid under this broad category, 'as well as … NGOs, educational institutes, and the Department of Labour' (CIDA 1999: 5).

Beyond these, there is an ongoing donor and government data base being actively considered by the Human Sciences Research Council (HSRC) which has a great deal of information capacity already, and sees this as an area where they could provide a potentially important service, which would be complementary to the work of the IDC. A first outcome of this HSRC interest is a report entitled 'The analysis of government infrastructure and development spending in South Africa' by V. M. Makinta and C. Schwabe (1999).

And finally, in this area of data development on donors, the IDC has developed an activity that will be, if implemented in full, extremely detailed. The objectives of this Reconstruction and Development Programme Information System (which is being developed by a consultant supported by the European Commission) are to provide greater transparency and better decision-making for both grant- and government-funded projects. In the words of the summary project document:

> The inherently decentralised nature of international assistance makes co-operation and communication between recipient agencies difficult as well as among donors, often leading to wasteful duplication of donor projects. (IDC 1999b: 1)

This may indeed be true, but the RDP Information System's aim of providing a very detailed breakdown on each project, with timeframe, objectives, costs, documentation, and a great deal else, looks like it will place a very considerable burden both on the donors and on the resources of the IDC. If the intention is really to cover the population of several thousands of projects, in full detail for the most recent period, as well as what has been granted since 1994, this would be a prodigious task. Maintaining that degree of detail for each following year would be extremely demanding.

Whether this donor data base will move beyond its present design and pilot phase is not known at present. But it is already rather clear, from a *Report on Evaluations of Donor Assistance to the Republic of South Africa, 1994–1999*, which was carried out as part of DCR II (IDC 1999c), that accurate financial contributions from donors were simply not available, and especially for some of the earlier period.

All of this review activity by aid during the period 1999–2000 has underscored the need for quality data, but it is not yet certain that DCR II, or its data base project, will provide the template for all future work on aid flows. Paradoxically, what makes this more uncertain is that the bulk of these initiatives discussed above (with the possible exception of the HSRC) have themselves been funded by the donor community. The largest of them, DCR II, has cost approximately US $400,000. While this is not a great deal to pay for a first-rate baseline on aid, the sustainability of the

exercise on a yearly basis would certainly require some significant government commitment.

What seems likely is that stakeholder discussions associated with the workshops and reporting of DCR II – currently scheduled for mid-June 2000 – will put firmly on the agenda the importance but also the sustainability of tracking donor aid nationally. In the meantime, we shall turn to review in somewhat more detail the subject of aid to skills and labour development, which we have noted has been afforded only limited coverage in what has been collected thus far.

Assistance to Skills Development in South Africa: A Genuine Partnership

The Complex Arena of Skills Development

Thus far we have commented briefly on the specific challenge in South Africa to donor visions and priorities towards development, and looked at some of their consequent attitudes towards particular sectors such as formal education and labour skills development. We have noted that education, though divided between national and provincial responsibilities, has broadly a single point of contact for any level, whereas labour skills development in South Africa, as in other countries, involves government, employers and trade unions. This tripartite division of responsibility makes external assistance inherently more complex, as there are multiple actors who in South Africa have had strongly contrasting views about the skills development arena. And of course, beyond the sphere of organised, formal-sector labour, there is the large and much less well-known world of skills needed for the micro-enterprise sector. The latter had become a point of concern for policy in the late 1990s, as a result of the crisis in job shedding from the formal industrial sector, and the awareness that the absence of dynamic opportunities in this part of the urban and rural economy would pose a massive challenge to school-leavers as well as to the half a million workers already retrenched from formal jobs.

What makes the informal or micro-enterprise sector particularly challenging in South Africa, however, is that there has not been historically a process of development of local indigenous business associations and trade-specific associations which have been commonplace in West Africa. Hence, compared to the articulate and politically visible, organised labour movement associated with the formal economy, the informal economic sector has had virtually no voice in South Africa. We shall note shortly that one of the more exciting and dynamic aspects of the new skills development vision of South Africa is to seek to avoid the dualism of formal and informal sectors, which has been commonplace in many other developing countries; instead, the intention has been to construct a single national system that would include, for each of the 12 economic sectors, the whole span of skilled work – from the individual multipurpose mechanic in the rural areas to the most specialised technician in the mines (King 1999).

We mention the challenge of constructing an inclusive system, since for donors with concerns about poverty alleviation and the development of sustainable livelihoods for the previously excluded, such a focus on inclusion could be important as an opportunity for supporting this form of pro-poor training.

There are three further, general points to be made about the differential character of the education and labour fields which may well have a bearing on reform initiatives that attract external support. The first is that because education is organised under a

single authority, at national or provincial levels, it is possible to ensure that a curriculum reform or other initiative can be implemented across the entire system. Thus the massive (if controversial) education reform called Outcomes-Based Education (OBE) is being implemented in the whole school system, a grade or two at a time. Quality can differ dramatically, as can resourcing, but in a predominantly public school system, the new currency of OBE can begin to affect all schools within a very short time.[14] By contrast in the field of labour skills, training takes place in at least four very different settings – in the workplace under employer jurisdiction, in Department of Labour training centres, in private training centres, and through the labour unions. In the case of South Africa, an additional complication, historically, is that apprentice training made use of the technical colleges for a good deal of the off-the-job training, but these colleges are under the jurisdiction of the Department of Education.

In a national curriculum reform initiative affecting skills training, therefore, there are multiple settings to be influenced, and the workplace training of the very many different types of employer, large, small and micro, simply cannot be legislated for in the way that is possible for an Education Department. Implementing and analysing the impact of a labour skills reform must be acknowledged to be fundamentally different from one carried out in an educational setting.

The second general element that can prove to be distinct given the tripartite organisation of labour is that external assistance can itself take many forms. It can follow the government-to-government route like so much bilateral assistance, but equally it can take the form of union-to-union assistance, or firm-to-firm. And there can be combinations of these. For example, the traditional development assistance agency can find itself supporting twinning between small firms in its own country and those in South Africa (Danida would be an example), or the aid agency can support union-to-union training. Even more complex, an external facilitator such as the British Council (itself funded by the UK Foreign Office and DFID) with bases in South Africa can broker South African-British business support in favour of collaboration between South African and British technical and further education colleges (British Council 1999).[15]

One of the most multifaceted aid ventures ever attempted must surely be the Sweden-South Africa partnership of 1999. Following on the Swedish Ministry for Foreign Affairs' encouragement to develop multiple forms of twinning and alliances (Ministry for Foreign Affairs, Sweden 1997, 1999), this initiative covered trade and industry, local governance, cultural interaction, research and university co-operation, labour relations and many aspects of civil society. Both Sida and Scania and Ericsson were involved in its support; hence it illustrated some of the changing dimensions of aid and trade to which we have referred above.

These few examples are only the tip of the iceberg of a whole range of twinning and partnership opportunities that are essentially more likely in the complex field of skills training than in education. One of the unique elements differentiating South Africa from most countries to the north of it in Africa is the presence of a long-standing tradition of business itself creating funds and trusts for the support of social and economic development. Two of the more recent of these are the National Business Initiative (NBI) and the Joint Education Trust (JET). The range of JET's support to many

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[14] For a powerful example of this nation-wide implementation, see Jansen and Christie 1999.

[15] The complexity of this kind of multiple partnership can be seen in the fact that although the partnership involves the National Business Initiative in South Africa and British Training International, and further education institutions in four regions of the UK and technical colleges in South Africa, the linkage is to the Department of Education because these colleges are under its responsibility in South Africa.

different kinds of partnership projects in the labour and skills can be seen in its *Bulletin* no. 8 which focuses on higher education, job creation and workforce development (JET 1998).

The third general point to be made about the skills arena relates to the particularity of the challenge to external aid in supporting training and development in the informal and micro-enterprise economy. We shall return to that in discussing the Danish support to learnerships below.

Locating Skills Development in Agency Portfolios

Before we turn in a moment to something of the history of assistance to labour skills in South Africa, we need to say a little more, in general, about the changing knowledge base of the agencies which have supported skills development. In summary it could be said that in the 1960s and 1970s, support to different forms of technical and vocational education and training (in school and post-school; in Education Departments and in Departments of Labour) was commonplace. Several agencies, such as the World Bank, British ODA[16] (now DFID), Swedish SIDA (now Sida), Canadian CIDA, Danida and German GTZ,[17] had very strong capacities in TVET. Some of them (e.g. the World Bank) had a whole cadre of their own technical educators; others a whole self-standing section on vocational training (ODA, SIDA and GTZ); while others again (like the CEC – now European Commission) had strong priorities in support of TVET, but little or no in-house knowledge base on this field.

South Africa quite suddenly became a potential funding partner at a very particular stage in donor history. A month after Mandela went free in 1990, there was held the World Conference on Education for All, which had a rather strong influence on shifting aid priorities in favour of basic education. In addition, the World Bank's policy paper on the vocational and technical area discouraged the funding of school-related vocational education; but it was also read (or misread) to imply that training was ideally left to the private sector, or to private training providers. But whatever the influence, the actual presence of donor staff with expertise on labour skills had shrunk dramatically by the mid to late1990s. Sida had only one vocational in-house expert left by the end of the decade, and DFID had none. Meanwhile the once very large staff of technical educators in the Bank had almost disappeared. CIDA too had no in-house professional capacity left.

The only agency with significant in-house expertise was Germany's GTZ. Danida and Irish Aid, which were both to play important roles in relation to South Africa, drew more on the experience of Danish consulting firms and of FAS International Consulting (the commercial subsidiary of Ireland's Training and Employment Authority) than on their own staff.

Modalities of External Assistance

Over the 1980s and 1990s there have been many different pathways whereby local thinking about skill strategies has been reinforced by external support. It would be impossible here to cover the contours of the complex map of this support, but it may be illuminating to sketch out in some more detail a few particularly suggestive

[16] Overseas Development Administration.

[17] Deutsche Gesellschaft für Technische Zusammenarbeit.

mechanisms. The first is solidarity funding, prior to majority rule, in which through the support of targeted short study tours and home-based participatory workshops a space was created for selective borrowing and knowledge sharing to be pursued. A second – again prior to majority rule – is the role of external influence in the national policy development process. First, this is briefly looked at in what sounded like a conventional sub-sector review, but one which did not so much suggest or set policy as confirm the policies that were already becoming central amongst the South African stakeholders. Then the question of ownership and partnership in the influential National Training Strategy Initiative (NTSI) is briefly examined. A further illustration of partnership comes from the substantial German support to skills development over the whole of the 1990s. This is compared with certain aspects of the European Union project which has constituted – at 46 million euros – the single largest support thus far to the Department of Labour. And finally there is an illustration of support from Danida to the new modality of training – the learnerships.

An Early Aspect of International Solidarity and Partnership in the Skills Revolution in South Africa

There is a rich tapestry of connections to be stitched together behind the emergence of South Africa's national skills strategy, which was confirmed in the *Green Paper: Skills Development Strategy for Economic and Employment Growth in South Africa* (Department of Labour 1997), but which had in fact been coalescing in a creative alliance of trade union educators, progressive employers, academics and even individuals from government departments over at least the previous decade. Something of this prehistory of the skills development policy in South Africa will shortly be captured and made available by a few of its key contributors.[18] For this present purpose, therefore, we shall pay particular attention to just one thread, that of the international, 'aid' connections of this South African policy search. A fuller account of these multiple external linkages and support processes will be in the proposed history, but it is worth noting here that they are judged to be significant by Adrienne Bird:

> South Africa has received an enormous amount of international support in the process of developing its skills development policies and implementation plans. This account will provide a qualitative account of the uses to which their contributions were put. (Bird 2000: 2)

There were certainly a number of international connections in support of the unions, and to support worker access to greater skill and knowledge, that went back into the early 1980s and even the 1970s. These paralleled what had been happening also in the education sector, where local NGOs had received funding from Northern NGOs at a time when direct aid from Northern governments to South Africa was considered illegitimate. Such was the abhorrence of the apartheid state that all kinds of special programmes were devised to allow funds to reach committed individuals. Swedish Sida was probably in the forefront of these unconventional forms of support, but these were what could be called 'solidarity' funds, and were not coming from sections of the agency that had any particular expertise in education or labour skills. Other early initiatives came from the South African German Chambers of Industry and Commerce in the mid-1980s, in the form of workers' advancement through a special training scheme. And there was also early German support to unions. But what is

[18] There is actively under review a proposal to write a history of 'The Construction of Skills Development Policy in South Africa: 1988–2001'. Currently the weavers of this tapestry are Andre Diepenaar (employer), Bogoshi Tshetla (trade unionist), Sam Morotoba (trade unionist/government official), and Adrienne Bird (trade unionist/government official).

worth noting in these early initiatives is that they were isolated, and not part of a pattern of systematic support to a locally emerging skills strategy.

One of the threads that did run directly into the larger pattern of planned skill advancement came in 1986–7 from education secretaries in NUMSA, the metal workers' union. Alec Erwin and Adrienne Bird were involved in setting up research and development groups (RDGs) proactively to develop union policies on the key issues of the day, such as housing and medical insurance. One of these was identified as the need for a training response to the very severe constraints on skill and knowledge. The organisers were determined to examine a wider range of possibilities than had been associated with some of the offers of Adult Basic Education coming from Government, NGOs and even the white craft unions. This Training RDG, initiated at the end of 1988 and beginning of 1989, was to go about its work in a participatory way, drawing on some 26 workers at all levels of skill in NUMSA (Sam Morotoba was one of these), and getting agreement for them to leave their regular work for three training modules of three weeks. Judy Favish and Adrienne Bird were two of the catalysts in what was to prove a highly participatory process. But it is interesting to note that it was to the local organiser of an NGO funded by the Australian union movement, Australian People for Health, Education and Development Abroad (APHEDA), that the Training RDG went for support.

Mapping in a little more detail what is just one fragment in what was to prove a highly interactive next five or six years may help to illustrate the sheer complexity of this whole debate about local policy development and international influence. Its very specificity is deliberately designed to make the point that although international aid can be discussed in very general terms, as at the beginning of this article, something of the actual pattern of what gets agreed to and implemented (or not) is inseparable from specific actors in the agencies and in government departments.

The first three-week module was concerned with what the facilitators were thinking of as two ladders of opportunity – one in education levels and the other in skill and career paths. Both were artificially blocked off (for non-whites) by white craft trade union reservation or by lack of sufficient formal schooling to allow for entry to a particular skilled worker grade. These two ladders – with the upper ends missing completely – and with no connection between them – were one of the earliest sources of the thinking that would eventually lead to the notion of an integrated system of education and training. Equally the practice of grading as 'semi-skilled' even those black workers who were actually doing skilled work with the connivance of employers would lead directly to the ideas about the Recognition of Prior Learning (RPL). In a very real sense, therefore, the search for a national system that would integrate education, skills and existing experience derived directly from those early discussions about how to break through the glass career ceilings that were set above the black industrial worker.

The first module raised the problems – including how to arrange pathways for advancement for large numbers of workers, old and young, without simply waiting for the old, traditionally white craft apprenticeship system to open up to a few more blacks.[19]

Between the first and the second module (which was to involve travel in small groups to study training in Zimbabwe, Sweden, Italy, Britain and Australia) one of those critical incidents took place which ensured that there would be a substantial

[19] Black apprentices had begun slowly to be accepted in the mines in the early 1980s, but to the early strategists of a South African skills system, access to this traditional but already declining apprenticeship modality was not a realistic option for a national solution.

influence from Australia upon the problem of integration that was facing the early strategists.

This Australian influence on labour (and via labour on education) has already been remarked upon, and most recently by Jansen (1999), but without any analysis of *why* Australia might be a relevant source of policy transfer in the late 1980s.[20] The reason that Australia was to become a fertile source of ideas was simply that the timing was right, and there had been in that country a dramatic and integrated attempt to restructure an industry and an economy that had lost a quarter of a million jobs in the early 1980s. Like South Africa a few years later, the team that produced the bible of Australia's industrial and skills revolution, *Australia Reconstructed* (Council of Social Service of New South Wales 1998), had itself travelled to Sweden, Germany, the UK, Denmark, Belgium and Luxembourg. The message was clear (just as it was to be in New Zealand a year or so later[21]) – that high skills and high wages would be critical to Australia's global competitiveness, and that this would mean massive changes to its own version of 'apartheid' in which there was an extremely rigid skills system, with little or no flexibility or mobility of workers even within its own different provinces (Machin 2000 [oral interview]).

The Labour government's determination to implement the bible in Australia meant that its system of Industrial Awards (national level wage agreements) now gave incentives to the particular union and the relevant employers to adopt a fundamental restructuring of work organisation, grading systems, and new modules of learning based on unit standards. At the same time, the system of Technical and Further Education (TAFE) was reorganised so that the new system of skills training was available across the provinces, and could be acquired on site, in the workplace, with the appropriate links to TAFE, through the common currency of modules based on unit standards. In addition to the old time-bound apprenticeship, a traineeship of approximately one year was introduced, based on the new currency of modules and unit standards. One of the existing advantages that doubtless made these changes easier to carry through was that, unlike South Africa at that time, there was a single Department of Education, Employment and Training. This probably made it easier to ensure that there was educational content in the new unit standards.

The state allocated very considerable sums of money to putting this reform into practice, and one critical dimension of this was the allocation to the major unions of a substantial number of what were called 'workplace change agents'. One of the unions that had made most rapid progress was the Metal Workers. It had rethought its 360 different job classifications and constructed a new system of just 14 grades. It was to this union that a young Englishman, Alastair Machin, who had come out to Australia 15 years earlier, was allocated as a change agent, in 1987. He became intimately connected with the intensive retraining of shop stewards and re-orientation of employers that was necessary to participation in the Metal Industry Award.

And by one of the remarkable coincidences of history it was the general secretary of the Australian metal workers who met his counterpart from NUMSA, of the South African metal workers, at an international federation in Germany, and passed him a

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[20] Jansen (1999: 6) asserts the influence of Australia on the South African labour movement as follows: 'At this point, there was a rich intercourse of ideas between leading thinkers in COSATU [Congress of South African Trade Unions] (such as Adrienne Bird and Gail Elliot) and their counterparts in Australia. Frequent travel between these two countries witnessed an exceptionally high level of exchange of frameworks, proposals and experiences, as South Africa gradually moved towards an integrated system based on specified competencies.'

[21] See Donn 1998 for an account of the development of national qualifications frameworks, and especially in New Zealand and Scotland.

copy of the *Australian Metal Worker* which in this particular issue laid out the whole new system of career paths and educational linkages. Within days, this was on Adrienne Bird's desk back in NUMSA, offering one very relevant account of how to deal with the integration of education and skills ladders. It was no accident therefore that Adrienne Bird selected Australia for the second three-week module (which was studying different training systems abroad), with her small team of four, supported by APHEDA. A short time later, in February 1990, she was sitting in on the new forms of shop steward training, and before she left Australia, she had urged both Alastair Machin and his colleague, Chris Lloyd, to come and work with the union movement in South Africa to assist with the spread through the unions of the new ideas about skills, knowledge and career paths.

Before Lloyd and Machin arrived in July and September 1992, to work with NUMSA and COSATU respectively, a great deal more had happened on the ground. The RDG on Training had finished its work, and a new project, supported this time by SIDA, had been developed, the Participatory Research Project, which carried the new ideas about the integration of education, training and career paths, through shop steward training, into other unions. APHEDA covered the salaries of the two new-comers for their first six months, and thereafter Lloyd was directly supported by NUMSA and Machin by SIDA for the next two-and-a-half years.

Before we leave this illustrative episode in the international interchange of ideas, there are a few points that should be underlined. First, though individuals have been mentioned in this short account, it is clear that what would later be called South Africa's skills strategy was forged and beaten out in a highly participatory way, which shared ownership of the process with a large number of people. Second, the specifically 'aid' elements in this initiative of knowledge sharing could both be termed solidarity funding, by APHEDA and SIDA respectively. Neither APHEDA, the union-supported NGO, nor SIDA, the bilateral agency, were themselves the source of knowledge relevant to the emerging skills policy. However, thirdly, these two bodies facilitated the transfer of knowledge embedded in individuals (Lloyd and Machin). Certainly, there is an enormous difference between the exposure to new or parallel ideas possible in a brief study tour and the long-term physical presence of knowledge embodied in people. Fourthly, Australia was a potent source of ideas and practice in industrial and skills restructuring, but equally there were several elements of the Australian reform that had no parallel in South Africa, and not least the commitment of the state fully to fund the reconstruction.

Lastly, there is the element of pure chance and unpredictability in some aspects of policy transfer. It just happened that in both countries the metal workers' unions were in the vanguard of the thinking about strategy, and of course no aid project could have arranged that the *Australian Metal Worker* should illustrate one innovative version of grades, levels and career paths at the very moment that it could contribute to thinking in South Africa.

Internal and External Discourse in the Policy Development Process: The 1992 Sub-sector Review and the NTSI (1994)

It may be useful to look, much more briefly than in the last example, at one of the first illustrations of donor co-ordination in support of a sector review, *Towards a Unified Technical and Vocational Education and Training Sector* (October 1992). It can be seen immediately from the title that the review had taken on board something of the important thinking we have noted above about the planned integration of elements in education and training. It is also worth noting that the donors involved in the review included the Commission of the European Communities (now European Commission), the GTZ, the ODA (now DFID) and a large South African NGO, the Kagiso Trust,

which had already served as a conduit for EU funds going to NGOs. It would appear that the South African partners may well have encouraged what were going to be a series of separate studies to be co-ordinated in this single review. It is also very obvious from the character of the report that it was conceived as a 'partnership activity between South African participants and a group of donor agencies' (CEC 1992: 1), and not at all as a piece of sector work undertaken by the donors. The presence of leading South Africans in the review team, and a separate reference group of four South Africans already intimately involved in policy work would certainly have ensured alignment with the converging assumptions about education and training reform in the country.

The final document is probably a rather accurate reflection of the situation in mid-1992. The union's participatory research project, referred to above, was just getting underway, and the surety and coherence that would very shortly be associated with the National Training Strategy Initiative (NTSI) was not yet in place. What is clear from the valuable bibliography is that there were a number of important documents beginning to come out of COSATU in 1991 and 1992 that were early attempts by union policymakers to stake out the ground.[22]

If the 1992 document was by no means the kind of donor-led sector review that has been critiqued frequently by Samoff (1995), the key *Discussion Document on a National Training Strategy Initiative* (NTB 1994) was also an illustration of a strongly held South African position about the new approach to training, even though one of the working committees had taken account of a series of international comparisons in the training field. This document, coming out just before the dawn of the first majority rule government, is one of the earliest full expressions of the new vision of training, but it is also a clear expression of the notion of an 'integrated approach to education and training' which Bird and her colleagues had sought to locate in their research and development group in the late 1980s. Its 12 principles captured the essence of what would be re-affirmed some three years later as the *Green Paper: Skills Development Strategy for Economic and Employment Growth in South Africa* (Department of Labour 1997). But as far as external influence on policy is concerned, the position of the NTSI on 'indigenous' versus foreign models is well expressed as the first of its 'Strategic Elements':

> It must
>
> be *indigenous* to the needs of South Africa to suit our needs, cultures and values but take cognisance of other tried education and training systems.
>
> In specifying this element, the Task Team accepted that while elements of education and training systems and strategies of other countries could be applicable to the South African situation, the strategy as a whole would need to reflect the particular needs of South Africa. The 'importation' of an education and training system as a whole or in part without adaptation to the local needs was considered highly undesirable. (NTB 1994: 7).

If the need to ensure that whatever was learnt outside was 'South-Africanised' was one key aspect of the NTSI, the other critical characteristic was the very strong sense that any key national strategy had to be worked upon and then owned by all the main stakeholders. This emphasis on national 'ownership' was to become one of the common features of agency discussion about policies such as sector-wide approaches in the late 1990s, but the notion was very seldom defined. By contrast, the determination to listen to all points of view and achieve a consensus before coming to a decision was apparently a feature of the eight working committees that made up the NTSI. In a way, the very unrepresentativeness of the past apartheid government had

[22] Amongst these would be Bird 1992 and COSATU Human Resources Committee 1992.

almost ensured that there was very serious consultation in the new dispensation. To a greater extent than in other sectors, the field of labour skills training, of course, meant that employers, trade unions, the government, and also providers of education and training were the key stakeholders. In the words of the Report, these working committees 'became dynamic learning *partnerships*, a further lesson for the South Africa of the future' (NTB 1994: 13).

If the language of ownership and partnership was very much more concerned with achieving internal consensus than about the internal-external dimensions that were the concerns of agencies later in the decade, it must nevertheless be remembered that the external did hold great attractions for many South Africans in the early 1990s. Quite suddenly in the short period from Mandela's release till majority rule in early 1994, the outside world which had been unreachable through sanctions was open and available, and quite rapidly also the bilateral and multilateral agencies which had not been able to work directly with South Africa were able to do so. Part of their work was a readiness to make available to the newly emerging policy constituencies in South Africa the lessons and good practice that were associated with their own countries, or, in the case of the multilaterals, with their policy development. In other words, the exposure to foreign examples of 'tried education and training systems', which is often a feature of consultative commissions, was a very natural reaction in South Africa to the decades of isolation. A good deal of this international study tour activity went on in the fields of education and training, but it should not at all be represented as a one-sided attempt by external agencies to offer South Africa a whole series of unwanted models. There was interest on both sides.

This makes the tracing of possible influences in education and skills training very much more complex. Thus, for example, the 'integrated approach to education and training' which became such a central feature of the COSATU/ANC position papers in the early 1990s certainly owed as much to the desire to counter the disintegrating effects of apartheid as it did to particular models of (desired) integration in education and training to be found in New Zealand, Australia, England or Scotland (King 1998). That said, these early documents resonated with concepts and debates that were current in Europe, but had been reworked for the very particular context of South Africa. For instance, 'high skill, high wage, high quality and productivity are central components of the envisaged reconstruction of the economy' (Bird and Elliot 1993: 2).[23]

This language became part of the currency of aspiration towards a new deal in skills development in South Africa just as similar language had done in certain key policy papers in the UK – and doubtless in Australia and New Zealand. One of the attractions of Australia (and also of New Zealand) over the UK may well have been that in the former there were major initiatives to implement the new skills strategies, whilst in the UK initially the debate remained to a greater extent on paper.[24]

It is, however, vital to distinguish between the clear knowledge in South Africa of the critical debates in several of these OECD countries, on the one hand, and the aid or, indeed, trade interests of particular countries wishing to assist, influence or develop commercial relations with South Africa, on the other.

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[23] A useful source on whole series of debates into which South African policy became tuned is Kraak 1997.

[24] Werner Heitmann (of GTZ) has written (1998) that 'up to 1994, the strategy debate was unmistakably influenced by Anglo-Saxon examples (e.g. the NVQ and SVQ debate in England and Scotland, Australia and New Zealand)'.

German-South African Partnership in Skills Development

We move in this third section to estimate the significance of a very different form of external support than that associated with the possible parallelism and resonance in training and reform discourses between South Africa and those of several other OECD countries. Here, rather, we shall examine the role of a single external partner, Germany – represented by the Ministry of Co-operation's bilateral executive arm, the GTZ – in its support to the skills revolution in South Africa. While it would have been possible to have examined the activities of other agencies, notably the Irish aid in this same domain, no other external partner has had the length, breadth and intensity of support over the past decade comparable to Germany. Within a very short timeframe, German support has moved from an almost inevitable reliance on a series of individual skills development projects to an integrated form of support to the whole skills sector. We shall shortly thereafter turn to the European Union (EU) which at first glance might seem a competitor for the position of principal partner. But in terms of symmetry, we shall note that the EU is a rather different kind of partnership than that of Germany and South Africa.

Fortunately for our purposes, GTZ has itself thought long and hard about its partnership with South Africa in the skills reform. In a 1999 evaluation, it conceded that in a situation where the entire framework of training is being radically re-thought and re-worked, the attempt 'to assess the impact of the German contribution within the above context in a scientifically sound manner is difficult, if not impossible' (GTZ 1999: 18). Where there are multiple influences at work, it is hazardous to search for direct one-to-one lines of possible impact. Instead, the German team decided that a broad-based discussion of the Skills Development Strategy of the government set against the Skills Development Strategy Initiative Support Programme (SDSI) that Germany had sought to put in place would give some indication of the effectiveness of their interventions:

> The outcome may or may not be based on the German contribution. However, the closeness or similarity of the South African strategy and system to German advice might be an indication of the success of the project in that regard. (GTZ 1999: 18)

In point of fact the evaluation took in the broad sweep of German support to training in South Africa over the whole decade from its inception in February 1990. Valuably, there is also available a commentary on the process of building a new skills system in South Africa, written by one of the GTZ employees, Werner Heitmann (1998). One of the challenges faced by the new approach of the Department of Labour has been to propose a new learnership system, to take the place of the older systems of apprenticeship. The new one would compensate not only for the exclusiveness and narrowness of the old apartheid systems, which in the case of the African majority had at best involved unstructured learning on the job, but would also benefit from the much closer linkages of education and training. Hence, the learnerships would span much more than the traditional male crafts, and there would be both structured, off-the-job learning and structured learning in the workplace itself. The result of this radical re-thinking of the apartheid systems was something quite close to the German system, though this should not necessarily imply direct borrowing at all:

> With this learning mechanism, the South African debate on vocational education and training policy is moving towards what can be seen as the core of German vocational education and training philosophy: the combining of structured learning at vocational schools ("Berufsschule") with practical workplace experience in relevant enterprises… (Heitmann 1998: 14)

There were, of course, many respects, and not least the determination of the Department of Labour to incorporate the world of the informal sector into the single national scheme, which would differentiate the South African model from that of

Germany. What perhaps marked off the character of the German support programme was its readiness to act almost as a facilitator to the whole complex programme of the skills revolution. So there was no question of the Germans building a key national training facility – infrastructure was not the problem; rather, the German presence was essentially a kind of sector programme support.

Reading between the lines of their own account, it would appear that German support has been important, not so much for importing ideas, as for allowing key innovative schemes that were already in the overall plan to be tried out sooner rather than later. Thus, it would appear that their readiness to provide consultancy assistance at critical moments, or to support key pilot schemes in the new training system, has prevented major delays. This would be the case in their support of the Education, Training and Development Practices (ETDP) Project which fed directly into the standards and qualifications needed for educators and trainers for the learnerships in different sectors.

Similarly, German support was on hand when it was becoming clear that the training of the National Standards Body members would be critical to their role in relation to the South African Qualifications Framework; and hence no fewer than 35 workshops were held to take forward the capacity building of the members. A similar case could be made for German support to the demarcation of the Sector Education and Training Authorities (SETAs). Again, it was not that the new economic sectors could not have been eventually demarcated with local funds, but the timely provision of two rounds of consultant support allowed the overall timetable to be adhered to.

Even with the centrepiece – the Learnerships – Germany was ready to support work at all levels in the initial phases of sorting out the framework and detailed guidelines. They were also ready to finance learnerships in two industries. Their own analysis of this support suggested, as we have indicated above, that it allowed the momentum of the reform to be maintained.[25] Recognising the potentially critical role of incorporating the skills training requirements of the small, medium and micro enterprises to the skills reform, the Germans also provided consultant support to pilot work in this sector.

Undoubtedly, the main success in the German support programme has been creative, just-in-time support when needed to a whole programme of reform which had many resonances with German practice but which also drew on other developments, such as the notion of a National Qualifications Framework.

When therefore the European Union's large scale project in support of many different dimensions of the skills development strategy was developed, it complemented many of the sectors that the Germans had already supported.

We have suggested above that Germany has acted in a way that is broadly supportive of the whole thrust of the Department of Labour's skills reform, in what could be termed a kind of sector programme support.[26]

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[25] The Germans have not been alone in support to piloting the new learnerships. Arguably, the Danida support to implementing and evaluating learnerships in KwaZulu-Natal has been equally or more influential in raising issues about the costs and viability of the new system. See the very valuable *Review Report on the Implementation of Learnerships* (Department of Labour and Danish Government 1998).

[26] The Green Paper of the Department of Labour (1997: 85) in fact acknowledges the contributions of several other donors to the proposals in the Green Paper, and notably the Irish, Danish, Australian and Dutch Governments.

The Labour Market Skills Development Programme

When we set out to examine external support to South Africa in education and training, it seemed that the EU's support to the above programme would be an essential element of our analysis, and not least because the *Development Co-operation Report* II looked as if it would be unable to cover labour market skills. However, as was mentioned in the section on 'Development Co-operation Reviewed', there is now a separate account of the EU labour skills programme within the DCR process. Hence we shall restrict this section to a small number of comments.

First, it is clear that the EU programme is in some ways an archetypal sector programme support. Compared with the conclusions of the CEC/GTZ/ODA and Kagiso sector review of just six years earlier (CEC 1992), the EU in the later 1990s was able to consider a dramatically transformed policy universe for technical and vocational skills. EU consultants worked with the Department of Labour (1997) in the last stages of the *Green Paper: Skills Development Strategy for Economic and Employment Growth in South Africa*, but their role was not to develop the Department's policy, but rather to assist with an implementation cycle for seven of the twelve central projects of the Department's Skills Development Strategy.

Unlike the German-South African partnership, which we have characterised as facilitative and back-stopping, some of these EU projects, with their small teams of European consultants, appear to be relatively critical to the implementation, on time, of some of the key technical aspects of what is a highly complex labour training reform. Thus, one group was working on the technicalities of the levy grant system, with an awareness of the deadline of 1 April 2000 for the start of the system. But what seems clear is that although the EU project has brought significant numbers of external consultant expertise into the Department, these personnel remain in reporting relationships to their South African unit heads in the Department of Labour. There is not a feeling of their being an EU exercise separate from the Department. In this respect, South Africa would differ from the experience of many of these consultants who have been working elsewhere in the developing world.

Even if this EU project, despite its visibility within the Department, is essentially implementing departmental policy, it does appear to have been a necessary transitional mechanism to meeting the government's own deadlines. In other words, it raises the question of whether the sheer complexity of the reform necessitated this injection of European expertise, or whether it would have been better for the process of implementation to have been delayed somehat and for there to have been more reliance on local South African expertise.

At this point, however, it must be remembered that the downside of what Heitmann (1999) has called the 'comprehensive and ambitious plan' that was needed to react to the legacy of the apartheid skills crisis was the challenge to its very implementation. He had gone on to describe it as 'possibly one of the most advanced skills development plans developed by any nation in the world' (ibid.). But during the ten years of rethinking and developing policy, securing consensus amongst stakeholders, and putting the legislative framework into place, there had been a considerable gap in the actual training of skilled people. Hence it was probably tempting to resort to external assistance to get the basic infrastructure and framework in place. Indeed, the Green Paper (Department of Labour 1997: 86) itself had said:

> Donor funds will be used only to establish the infrastructure for a system which can be sustainably funded in the long term from domestic financing sources.

The extent of this huge innovation with the new system of national qualifications, the new modular curriculum, the new standards-generating bodies and the new Sector Education and Training Authorities – not to mention the new clienteles and target

groups – meant that it was in mid- to late 2000 that the framework was almost in place for the new learnerships to be tried out in regular rather than in pilot settings.

The EU project, which had a very large component of technical assistance, will need to be judged by whether the political end of speeding implementation justified the reliance on such extensive external consultancy. And this last is, of course, the other element that would make the German and EU variants of sector support somewhat different. The trans-European consultancy arrangements drawing on consortia from several different countries are different kinds of timebound partnerships than the GTZ SDSI Support Project whose duration was planned for twelve years. In addition, as was mentioned earlier, the EU does not draw on its own expertise in technical and vocational training for this kind of project, but must rely on expertise selected through competitive bidding amongst the Member States.

Piloting the New Learnerships: A Challenge for Danida

Perhaps appropriately, we end this exploration of different modalities of external assistance by one that took possibly the single most important aspect of the carefully developed skills policy – the learnership – and tested it in rather demanding conditions, in KwaZulu-Natal, in two different industries, construction and tourism. Because Danida was committed to a transitional pro-poor assistance strategy in South Africa, originally predicated on a termination of its aid by 2000, it was essential that they selected for their labour skills support one of the poorer provinces, and within the whole skills project, they chose the more demanding target groups – outside the urban areas.

Danida (through a consultancy firm in association with the Provincial Department of Labour) has produced an extremely insightful set of commentaries on this whole pilot process, from 1997 to 1999, and there is no need to reproduce the many important issues raised by these here.[27] But what this donor-funded piloting did demonstrate very clearly is that the process of translating the very exciting Green Paper vision of access to new skills, even for the rural unemployed, is extremely challenging. Again, as we argued for GTZ, the pro-active presence of Danida, ready rapidly and thoughtfully to try out one of the key components of the new training regime was undoubtedly an advantage. Within two years, a whole series of valuable lessons had been learned. But they had been learned in somewhat artificial conditions, by a donor who was prepared to pay for the experiment to be carried out and reported on before the end of their original period of transitional assistance, 2000. Danida was able to demonstrate that it was possible very carefully to select trainees from disadvantaged communities, and expose them to the new system of structured on-the-job and off-the-job training, but at quite a considerable cost. As a donor they were able to provide additional resources when unforeseen costs emerged. The process of telescoping this pilot into a very short period certainly made available some important lessons for what would shortly be the large scale efforts to develop learnerships across South Africa.

What would also be valuable would be to put together the lessons from the different learnership pilots, German-, Danish-supported and others, to see whether in very different settings similar insights had been gained.

[27] The reports of the piloting were discussed at public workshops in Durban and Pretoria in November 1999.

Conclusions

This paper has been about the role of external aid in the internal reform of skills training. It is appropriate now to draw some of the threads together, and to see if there is a pattern.

The first clear element that can be picked out is that by the time South Africans were beginning, in the late 1980s, to think ahead about the shape of the post-apartheid training policy regime, their chief requirement was knowledge rather than infrastructure. They were particularly looking for knowledge that would offer a solution to the fragmented world of apartheid training. It was natural that integrated systems should appeal, and that therefore countries like Australia and New Zealand which seemed to illustrate aspects of radical rethinking should be attractive. It was also natural, as the trade unions in South Africa were one of the leading edge institutions in the search for new structures, that they should gravitate towards examples where there could be co-operative learning. We deliberately picked out a single example of such learning (from Australia) to illustrate this.

A second element relevant to South Africa concerns the coincidence of the timing of majority rule in the early 1990s. By this point, external agencies were actively concerned with ensuring that the overall policies in recipient countries were appropriate, and they were no longer so ready to provide stand-alone projects without a parallel concern with the larger policy environment. In South Africa, there was considerable evidence of this donor interest in the education sector. Education policy units were established, with donor support, in different parts of the country, as well as in Johannesburg, in the Centre for Educational Policy Development. It is noteworthy that there was no comparable externally supported policy process undertaken for those planning the future of the labour skills area. Admittedly, there was the *Report and Recommendations of the Technical and Vocational Education and Training Sector Review* (1992) but this was a one-off activity, and was much influenced by the key South African actors already engaged with the policy process.

Thirdly, what is remarkable about South Africa, in many different sectors, is the sophistication of the policy development process. The Department of Labour may not have had as much external support for the policy process as Education, but already, just before majority rule in 1994, there had been produced the National Training Strategy Initiative, and then just three years later, the Green Paper. This paper does acknowledge 'significant management support through a project management cycle workshop' run by the EU, and equally the Irish, Danish, Australian and the Netherlands Governments are thanked for assistance in the preparation of proposals that are in the Green Paper (Department of Labour 1997: 85). But this is not to say that the Green Paper is an amalgam of externally proposed funding projects. Quite the opposite. The agencies have effectively been supporting the aspirations of the leading South African stakeholders. Hence our description of the German and EU role as a form of sector support to the entire labour skills arena.

What is clear is that South Africa has been very definitely in the driver's seat. It was looking for appropriate 'international best practice' principally in the OECD countries, although not neglecting what had been learnt in Sub-Saharan Africa. With the benefit of hindsight it can be seen that it sought to acquire knowledge from the World Bank but without entering a client lending relationship. Its new policy community has accepted technical assistance from OECD countries, but equally some of South Africa's knowledge acquisition in the skills arena has not been aid-dependent. The policy community has been informed of developments in those countries which they feel provided good examples of skills rethinking, and it has been possible to access this knowledge in a variety of symmetrical relationships. In other words, South

Africa's skills revolution in the 1990s has not been the result of a co-ordinated donor policy to organise a sector-wide approach (SWAP) to this arena, nor has it been the result of a planned donor introduction of a national training authority of the kind that has been seen elsewhere in Sub-Saharan Africa. It has been a highly autonomous search for instruments of reform. Donors have been very ready to assist from many different countries, but the overall negotiation for a new skills architecture has firmly been in South African hands.

A fourth dimension is a further aspect of the first. We have called the agency role facilitative rather than determinative, in the sense that they have facilitated the development or delivery of a particular feature, already decided upon by the Department, rather than determined policy. But, arguably, the sheer range of these innovative structures and procedures in the new training policy is so comprehensive and the timelines so tight that the technical facilitation by external consultants may have had the result of cutting a few corners when it would have been important for locals to work through the challenges for themselves. This must, however, remain speculative for the moment.

Finally, though agencies have been invaluable in this supportive role, the Green Paper recognises that training is also, in South Africa, a highly political process. The excluded must be included, the isolated must genuinely feel themselves part of a new system of training opportunities for all. So like health, education, housing, and health, the area of labour skills is not just a technical matter of organising a new system; it must also be a question of showing that there are X thousand younger and older people taking up the new learnerships.

It has taken virtually a decade to construct *de novo*, and then legislate for, the new training dispensation. This task is now complete, and the acid test of take-up and implementation is now in process in the year 2000. In terms of our original tension between aid for democracy and aid for education or training, we can perhaps restate this to say that a system that ignites the imagination of a very large section of the population in acquiring solid training in their career is itself a contribution to democratic participation.

The challenge of the last decade of intensive preparation for these new training horizons must be whether firms, formal and informal, will now feel that they have in their possession a national vehicle for their staff training ambitions.

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