



LEARNING AND 'BUILDING BACK BETTER'

An Early Research Response to
the Impact of COVID-19 on South
Africa's Education System

*James Keevy, Zaahedah Vally, Andrew Paterson,
Milisa Janda and Amina Osman*



The Commonwealth

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Abbreviations and Acronyms

ADSL	asymmetric digital subscriber line
ASISA	Association for Savings and Investment in South Africa
BBB	Build/Building Back Better
CEM	Council of Education Ministers
CHE	Council on Higher Education
CoV	coronavirus
CSI	corporate social investment
CSOs	civil society organisations
CSTG	civil society task group
DBE	Department of Basic Education
DHET	Department of Higher Education and Training
DHEST	Department of Higher Education, Science and Technology (formerly DHET)
DIRCO	Department for International Relations and Co-operation
DSD	Department of Social Development
ECD	early childhood development
ESG	environmental, social and governance
FSCA	Financial Sector Conduct Authority
GDP	gross domestic product
GIIN	Global Impact Investing Network
GRIA	Bridge Global Managed Growth
GSG	Global Steering Group
HEIs	higher education institutions
HHT	human-to-human transmission
ICT	information and communications technology
IFIs	international financial institutions
IIEP	International Institute for Educational Planning (UNESCO)
IPASA	Independent Philanthropy Association of South Africa

ISASA	Independent Schools Association of South Africa
ISRCC	Iranian Society of Radiology COVID-19 Consultant Group
JET	JET Education Services
MAC-COVID 19	Ministerial Advisory Committee on Coronavirus Disease 2019
NASCEE	National Association of Social Change Entities in Education
NCCC	National Coronavirus Command Council
NCIP	novel COVID-19-infected pneumonia
NECT	National Education Collaboration Trust
NEET	not in employment, education or training
NGOs	non-government organisations
NPOs	non-profit organisations
NSFAS	National Student Financial Aid Scheme
OBC	outcomes-based contracting
ODA	official development assistance
OECD	Organisation for Economic Co-operation and Development
OxCGRT	Oxford University COVID-19 Government Response Tracker
PPE	personal protective equipment
PPPs	public-private partnerships
PSET	post-school education and training
QLFS	Quarterly Labour Force Survey
SABC	South African Broadcasting Corporation
SACE	South African Council for Educators
SADC	Southern African Development Community
SAMEA	South African Monitoring and Evaluation Association
SDGs	Sustainable Development Goals (United Nations)
SETAs	sector education and training authorities
SSI	self-sovereign identity
StatsSA	Statistics South Africa

TVET	Technical and Vocational Education and Training
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNGA	United Nations General Assembly
UNPRI	United Nations Principles for Responsible Investment
USAf	Universities South Africa
WFP	World Food Programme
WHO	World Health Organization
YDI	Youth Development Index

Summary

This publication presents a public account of an early research response to the impact of the COVID-19 pandemic on the education system in South Africa. This response took place between March and April 2020 during the most acute period of the COVID-19 lockdown in South Africa. The publication provides a high-level account of the collaborative effort premised on an action research approach and underpinned by the work of young volunteers that included university students, newly qualified teachers and others, working under the guidance of established researchers, and peer reviewers from South African universities, government departments and several international experts. The research was completed in this short period, and released soon thereafter, in an attempt to provide ‘real time’ contributions that policy makers could use when it was needed most.

“Bootcamps” were conceptualised and overseen by the non-profit educational research agency JET Education Services (JET), partnering with a range of other local organisations, and organised across 12 thematic workstreams. As this publication is released, some of the knock-on effects of the thematic papers produced remain to be seen, but several others have already taken hold as (see Rusznyak et al. 2020; Mawoyo and Vally 2020; De Witt et al. 2020; Parker et al. 2020). While every effort was made to ensure that the research and insights were credible and authentic, it must be borne in mind that the intention was constrained by limits on time and methodology. In recognition of the value of this initiative, JET was commissioned by the South African regional office of the United Nations Educational, Scientific and Cultural Organization (UNESCO), Rhodes University and the Open Society Foundation to conduct a similar programme across the fifteen SADC member states in the second half of 2020. Later, still in 2020, the programme was expanded even further, and in collaboration with the Commonwealth Secretariat, with fifteen thematic research themes involving participation of the majority of Commonwealth countries.

The twelve thematic workstream reports from the South African response are integrated in this publication according to five cross cutting dimensions: uncertainty and complexity; risk, anticipation, opportunity and personal risk; hunger, anxiety, depression, abuse and boredom; inequality, social cleavages and resources; and information, accountability and responsiveness. The five main chapters of this publication explore various aspects within this framework, with the specific intention to not only summarise the workstreams, but to provide a deeper layer of analysis and insights that could be of value to other countries during and after the COVID-19 pandemic period.

Chapter 2 focuses on education funding models, arguing that simply advocating for increased financial resources both during and after the current crisis is not enough; rather, a structured approach is required, blending traditional and non-traditional funding resources, and a strong collaborative model that secures flows to targeted priority areas. Chapter 3 draws attention to the vulnerability of personal data and the frequency with which privacy is breached online. This important topic has gained additional traction in recent months as more emphasis will undoubtedly be placed on the digital rights of citizens in post-COVID 19 contexts. Chapter 4 considers the responses of the South Africa government and of civil society to COVID-19, as well as the extent of collaboration between sectors. Chapter 5 looks at how technology can support self-organised learning and how, despite their limitations, these forms of learning present opportunities for children, adolescents and lifelong learners who would otherwise be denied access to quality education and learning, as well as for teachers. In Chapter 6 the focus is on the quality of communication between government and citizens, within families, and between schools and learners.

In the final chapter the authors review the thematic outcomes of the research bootcamp through the lens of 'Building Back Better' (UNISDR 2017), as they draw out some future challenges and opportunities for research in Commonwealth countries other than South Africa. In closing, the point is made that while 'Building Back Better' may be a laudable goal, the consequences of the pandemic will be felt for many years to follow as government debt burdens spiral, and learners across ECD, schooling, Technical and Vocational Education and Training (TVET) and higher education are left with considerable gaps in their education.

The insights and observations from the South African experience are made available to an international audience, not because all the answers were found, nor because the authors claim the research to be above criticism, but because the process has shown what can be done in a time of crisis, in an agile and collaborative manner, by educational researchers from diverse backgrounds and highly varied levels of experience. If this can be done in a country like South Africa, with its huge inequalities and diverse groupings, many others could do the same. Collaborations such as these can only make education systems more robust as we build a new generation of teachers and educationalists that our world needs, now more than ever.

List of Contributors

Milisa Janda is a researcher and emerging evaluator working in the education sector. She holds a Master of Philosophy in Monitoring & Evaluation from Stellenbosch University and a Bachelor of Arts in Black Studies from Amherst College, Massachusetts. She started her M&E journey as an intern at an NGO focusing on intervention research in the rural Eastern Cape and has worked in education research for over six years.

James Keevy is a policy researcher that works in the education and training sector. He has conducted and overseen various initiatives related to national, regional and international qualifications frameworks in Africa and further afield. His research into qualifications, the recognition of learning, and the professionalisation and migration of teachers has been widely published and presented.

Amina Osman has international development experience in research, policy, capacity development and monitoring and evaluation related to sustainable development, improving social inclusiveness and accountability. Her primary focus is on education systems being more inclusive, equitable and quality oriented to improve the status of children and youth, including through non-formal learning and transition to decent work.

Andrew Paterson is a Research Associate with JET Education Services. He was previously a Research Director at the Human Sciences Research Council, Senior Researcher at the Southern African Development Bank and taught sociology and history of education in South African universities. His current research interests include; technical and vocational education and African labour markets, work based values, and trust and accountability in education

Zaahedah Vally is a researcher at JET Education Services, working across research and implementation projects. She received her Bachelor's degree in International Relations with the University of South Africa (UNISA) and a Postgraduate Diploma in Management (Monitoring and Evaluation). Currently completing her Master's degree in Management (Development and Economics), Zaahedah is passionate about driving socio-economic change in South Africa by improving the quality of education in the country.

Chapter 1

An Early Response to the
COVID-19 Pandemic in
South Africa

Chapter 1

An Early Response to the COVID-19 Pandemic in South Africa

Andrew Paterson, Zaahedah Vally, James Keevy and Amina Osman

1.1 Introduction

The COVID-19 lockdown in South Africa that started on 26 March 2020 and lasted until 30 April 2020 spurred educational research agency JET Education Services (JET) and several similarly oriented organisations to launch a research project comprising 12 thematic workstreams focused on the pressures placed on education systems. The project catalysed a collaborative effort among demographically and culturally diverse researchers who contributed meaningful solutions using agile action research methodologies. The process allowed for real-time inputs into the efforts of national organisations and bodies, including South Africa's Department of Basic Education (DBE) and the Department of Higher Education, Science and Technology (DHESST)¹ as they began work to 'Build Back Better' (BBB). In more than a few instances, the research outputs contributed directly to national response initiatives (see Rusznyak et al. 2020), while in others the basis was formed for further research (see Mawoyo and Vally 2020, which drew on De Witt et al. 2020). The nature of this research is made explicit at the outset of this publication to ensure that the reader is fully aware of the limitations.

While *recovery* from the pandemic primarily means—for the many millions of people infected by COVID-19 and their families—a return to health after infection by a virus that can have fatal effects, recovery is also being spoken of urgently at many other levels. The COVID-19 pandemic has disrupted lives, societies and economies along multiple dimensions, and hence there is additional focus both nationally and globally on *recovery* in terms of:

- the economy (global value chains, economic sectors and industries, regional economies);
- enterprises (businesses—especially small businesses);
- employment and livelihoods (labour markets, skills demand, subsistence activities);
- education (schooling dislocation, learning loss, new learning modes);

- government and governance systems (public trust, capacity, fiscal challenges, corruption);
- human rights (gender-based violence and violence against children, excessive force used by government security agencies); and
- multilateral co-operation (mutual assistance, collaborative world government).

As government lockdown strategies aiming to slow the spread of COVID-19 have been implemented widely and in some cases extended, the immediate impacts of those lockdowns on local business, employment, household incomes and food access have prompted governments to deliver emergency support to businesses and communities. Many of the governments delivering financial measures—in the form of concessions, subsidies, allowances and cash transfers—have termed these as part of their 'recovery planning'.

It has rapidly become apparent, however, that effective recovery interventions must extend well beyond any periods of lockdown. Evidence is mounting that the pandemic has comprehensively disrupted the distribution of relief and support among communities already living in poverty, and thereby worsened the living conditions of millions of people globally (Akiwumi 2020; UNECA 2020). Reports on employment and unemployment globally, in both the formal and informal sectors, and on conditions of hunger and food insecurity indicate the damage done by the pandemic—especially in low-income countries—beyond its immediate impacts on health (International Labour Organisation 2020a, International Labour Organisation 2020b).

1.1.1 'Building Back Better'

Ability to recover is fundamental for the survival and development of both human beings and complex dynamic systems, but it is not always guaranteed. Recovery from a global pandemic is particularly challenging. Governments, businesses and even families must also shift their focus from simply repairing the damage done to taking advantage of the opportunities for reshaping and improvement.

The BBB approach to disaster recovery was first introduced in 2006 on the second anniversary of the 2004 Indian Ocean earthquake and tsunami, and it was further developed and refined in the aftermath of Tropical Storm Ondoy (also known as Typhoon Ketsana) and Typhoon Pepeng (also known as Typhoon Parma), which hit the Philippines within the space of a week in 2009, as well as the 2011 Tōhoku earthquake and tsunami, which led to a nuclear accident in Fukushima Prefecture, Japan.

In 2015, the BBB concept was officially defined and incorporated into the Sendai Framework for Disaster Risk Reduction 2015–2030 (UNISDR 2017), which the United Nations General Assembly (UNGA) adopted in the same year, in recognition of its widespread use among disaster risk management practitioners, policy-makers and researchers.

Disasters, both natural and otherwise, have long been leveraged as opportunities for positive transformation. A longitudinal study conducted amongst a Tawahka Amerindian community of Honduras before and after Hurricane Mitch that hit Central America in October 1998, indicated that the climatic disaster enabled the poor community to initiate institutional change that led to more equitable land distribution and slowed primary forest conversion. It enhanced the community's resilience such that it could cope with similar extreme events in October 2008, with limited loss of agroforests and health impact (McSweeney and Coomes 2011).

In some cases, disasters and natural shocks expose and trigger challenges to inadequate policies and practices that disadvantage certain groups, such as low-income households. The BBB approach centres reconstruction efforts on redeveloping rather than simply rebuilding. By strategically embracing the dismantling effect of emergencies and crises, BBB aims to refocus institutional, financial, political and human resources to optimal effect. Positive externalities rooted in crisis situations can lead more robust and resilient societies and systems to emerge—and in *Key Propositions for Building Back Better*, Clinton (2006) recommends empowering families and communities affected by disaster, local governments and non-government organisations (NGOs) to actively participate in these processes of recovery and reconstruction.

The aim of BBB is post-disaster recovery that increases the resilience of nations and communities; BBB is a framework intended to inform the identification, prevention and management of disaster risks.

Although the impact of the COVID-19 pandemic is global, there has been no universal approach to its mitigation and some of its consequences can arguably be attributed to inadequate pandemic preparedness among national governments (Woods 2020; Lovelance 2020).

While, to date, BBB has largely been applied to localised geo-physical disasters and may yet need to be tested in terms of its applicability in a global pandemic, it is apparent that the earlier we add recovery to the agenda in any disaster scenario, the better. As we plan for post-disaster reconstruction, we must take adequate account of immediate and long-term goals, and we should demonstrate high standards of co-ordination, identification, participation and financial controls. In rebuilding, we should be targeting further objectives of reducing vulnerability.

The BBB approach emphasises investigation of the root causes of those vulnerabilities and the establishment of systems that move beyond disaster recovery—the repair of that which was damaged or lost—towards risk reduction—that is, the redevelopment and rebuilding of structures that are better able to respond to future challenges. In this way, BBB reflects an increasing global focus on populations made vulnerable by structural social and economic inequalities, recognising the link between these vulnerabilities, limited resources and any nation's or community's capacity to respond to disaster (UNISDR 2017; Hallegatte, Rentschler, and Walsh 2018).

Recovery cannot be limited to a sociotechnical perspective or challenge that can be driven by governance without public engagement. Governments, donors, and aid agencies must recognise that families and communities drive their own recovery (GFDRR, 2017). In the context of high levels of inequality both within and between countries, and in which fiscal resources are scarce, how recovery is conceived of, owned and shared in communities and regions is a strategically important point of debate.

1.1.2 COVID-19

COVID-19 is a member of the coronavirus (CoV) family of viruses and is understood to have first surfaced in China in late 2019. The rapid spread of the virus led the World Health Organization (WHO) to declare it a global pandemic on 11 March 2020. Countries around the world were plunged into crisis as they attempted to manage the spread of the virus and a 'new normal' emerged, affecting the way we work, the way we socialise and how we exercise civil liberties, such as freedom of movement. Perhaps most importantly, COVID-19 exposed global inequalities spanning socio-economic, health and education, among others, and domestic capacity to orchestrate effective pandemic responses has varied. Some national governments' efforts have been less than effective, while pandemic preparedness among communities widely depends on their circumstances including the pre-existing state of health care (Stiglitz 2020).

In South Africa, COVID-19 has exacerbated existing inequalities, including health gaps (Nwosu and Oyenubi 2020). A national lockdown in early 2020, including the closure of schools, meant that children not only were left without contact teaching time but also risked going hungry: for some, a single school meal is all they will eat in a day. As e-learning and other forms of remote learning were swiftly developed and delivered, at the school level and especially across higher learning institutions, students without access to the internet, computers or televisions were further marginalised. Even though some measures were put in place to mitigate such risks, learners across the South African education system were exposed to the harsh impact

of the pandemic. Thus, it became essential that both state and non-state actors take meaningful steps both to limit the spread of the virus and to manage its impact on society.

Because the education system in South Africa has a relatively large institutional footprint as compared to the healthcare system, for example, it offers a valuable focus for research into its preparedness for a novel global pandemic and into what measures to mitigate the impact are proving effective, including in what contexts and why. In this way, it was JET's hope that this project would yield important lessons for other sectors and for other Commonwealth countries.

1.2 Methodology

On 13 March 2020, during the early onset of the COVID-19 pandemic in South Africa and two weeks before the country implemented a lockdown, JET released its special bulletin and briefing paper, *Extending the Capacity of Governments and Communities to Save Lives: The Role of Education Systems in Responding to COVID-19 and Other Threats* (Paterson 2020). At this time, the education sector in South Africa was largely unprepared for what lay ahead. Indeed, South Africa as a whole—like many countries across the world, developed and developing alike—was struggling to come to grips with the scale and potential impact of the emerging crisis.

It was at this time, as we contemplated the role JET could play, that the notion of a collaborative research response rapidly took shape. On the eve of lockdown, on 26 March 2020, JET followed up on its preliminary paper by launching its research project *#OpenupYourThinking*. Initially conceived of as an intensive research exercise (a bootcamp) focused exclusively on six thematic areas in education—a number that soon grew to 8, then 10 and later 12—the project brought together more than 120 volunteer researchers (mostly below the age of 35), recruited from across South Africa and including South Africans based in China, Malaysia and elsewhere. These volunteers were paired with established senior researchers, recruited as theme leads from relevant key disciplines, and further supported by peer reviewers from national education departments, as well as sector education and training authorities (SETAs), and from outside of South Africa.

Aiming to build capacity among this group of young researchers and to deliver agile research that would be both coherent and activist, the key focus of the bootcamp initiative was on finding solutions to the immediate pressures being placed by the pandemic on education systems in South Africa. The agile method allowed researchers to reveal problems and challenges early on, to achieve some very insightful finds and therefore

consider the opportunities and possibilities. The drawbacks may have been that research teams could not realise large sample sizes or evaluate sub-groups within the data. An alternative perspective is that every piece of research does not necessarily require a lengthy questionnaire or a large sample size; that a fair balance can be stricken between speed, flexibility, a series of results versus time, detail and perceived rigour to generate sufficient evidence. It was thus anticipated that the exercise would span lockdown—that is, an initial period of 21 days (26 March–16 April 2020), extended by a further two weeks; in some cases, however, research activities extended well beyond those five weeks. All papers were peer reviewed externally by seasoned researchers.

The duration of the project was intentionally kept short, partly to coincide with the period of lockdown in South Africa and partly to fuel the bootcamp methodology. Over 30 calendar days, each research group met according to a schedule tailored to meet its own objectives. For example, participants and facilitators focusing on Theme 4 COVID-19 lockdowns – can they help to govern the pandemic in Africa? (see 1.3.4) met online for sessions of 1–2 hours; these sessions totalled some 16 hours during the period, while participants spent a larger part of their time (some 40–60 hours each) researching, writing and meeting in pairs. Participants in the bootcamp generally agreed that its time frame could have been extended for them to get a better understanding of the research designs and methods, as well as to formulate and clarify the subject areas.

Volunteers were attracted by the prospect of online workshops, which offered a vehicle through which they could participate in valuable work even under lockdown conditions. Based on participants' surveys, interactions and feedback received during the online meetings, it seemed that participants responded positively to the project framework, doing diligent research, raising issues, and engaging each other in discussion sessions. In their application to be enrolled in the project, they indicated that felt that the project presented an opportunity for both personal growth and increased understanding of the COVID-19 pandemic—that is, the opportunity to make sense of its impact. This was true both of the students who comprised the majority of the bootcamp participants and of those in full-time employment. For some, changed work environments had made space for their participation in the project. For many, a sense of social crisis and shared adversity had further motivated their participation—in part, in an effort to combat isolation and distress.

The bootcamp initiative, #OpenupYourThinking, comprised a co-ordinated, yet flexible, approach to research that soon found traction in the sector. Substantive research work across each of the 12 themes generated tangible outputs: research reports and infographics; a curriculum document; and

other products, including interviews with the research leads. The resulting insights allowed JET and its partner organisations to make real-time contributions to government and non-profits as they attempted to reshape national education processes fit for delivery under pandemic conditions and beyond.

The project can consequently be considered a success not only in terms of its outputs, but also in that it demonstrated the viability of using an online platform and video-conferencing application to recruit to, co-ordinate and facilitate a research initiative remotely. The learning resulting from this experience showed potential to enrich the processes, functions, workflows and capabilities whereby participants work towards shared research goals, and these insights might themselves be shared with government actors and civil society organisations seeking to take a similar approach. A similar initiative has since been convened for the Southern African Development Community (SADC), with collaboration from the South African regional office of the United Nations Educational, Scientific and Cultural Organization (UNESCO), Rhodes University and the Open Society Foundations. While #OpenupYourThinking will soon return to South Africa to support an inter-association collaboration focusing on monitoring and evaluation.

In this specific instance of the education system in South Africa, the online mode and collaborative methodology provided an alternative space that yielded research outputs produced under adverse conditions as collected in this publication and offered hope to a sector under pressure. The work of volunteers and activists, both young and established, and the thoughtful engagement of decision-makers in government and development agencies bode well for an innovative future in which the trend towards deepening structural inequalities is slowed—and ultimately reversed.

1.3 Key themes explored

The following sections offer short overviews of each of the 12 themes researched through one or more methods by a team within the bootcamp framework. Each thematic report is available in full online.²

1.3.1 Theme 1: Education at home

The onset of the pandemic highlighted inequalities (Sulla and Zikhali 2018; Leibbrandt and Shipp 2019; IMF 2020) in both economic and life opportunities in South Africa. Because schools and the provision of quality education have the potential to improve socio-economic status, the closure of schools across South Africa is a major concern for many; hence one theme on which the project focused was the home education practices of families

across the country in an attempt to mitigate school closures. Research comprised a qualitative study of households in the form of telephone interviews and it was conducted during the highest level of lockdown restrictions, so a convenience sample of families with whom the researchers were familiar had to suffice, consisting of 16 mainly urban middle-class and township households.

Overall, schools were found to have provided only limited materials to keep learners appropriately occupied during the lockdown. The study also found that although most caregivers in the households sampled had a tertiary qualification, they experienced feelings of anxiety arising from uncertainty about their children's education, as well as their own limited ability to adequately assist their children with schoolwork. It was also found that the internet was not the most appropriate communication tool because of the associated data costs and accessibility challenges that poor and rural families faced.

For this reason, the team focusing on Theme 1 recommended that the government make available resources for more suitable and cost-effective technologies to reach learners, to include broadcasting lessons by television (Taylor et al. 2020), low-cost internet service provision and cost-free access to educational websites.

1.3.2 Theme 2: A comparative study of the response of non-profit organisations in education to the COVID-19 pandemic

The lockdown that was initiated on 27 March 2020 aiming to curb the spread of the virus halted all non-essential services. Non-profit organisations (NPOs) had to make strategic decisions regarding their core projects, programmes and activities, taking into account the impacts that these decisions could have on beneficiaries heavily reliant on their services. In the education ecosystem, NPOs are important players serving the needs of vulnerable communities; hence it was decided that another theme of the research would explore their responses to pandemic conditions.

Based on a survey of 89 NPOs, as well as desktop research and in-depth interviews with 14 NPOs, the team focusing on Theme 2 identified shared uncertainties that were exacerbated by NPOs' isolation, indicating the need for greater collaboration both among them and between them and government (Rajab et al. 2020). Many expressed concerns about whether the National School Nutrition Programme would continue, whether clean water and toilets were available to children, and whether personal protective equipment (PPE) could be provided for all schools in need. The NPOs also reported concerns about their funding after the lockdown and the restrictions imposed on them.

Because their operations rely on physical movement or interaction, lockdown had forced some NPOs into shutdown. Other NPOs could continue offering their services remotely, through internet-based means. For many NPOs, these challenges had triggered a restructure and redirection of resources. The crisis had also highlighted the need for agility in organisations and shed light on the importance of partnerships in overcoming this period of uncertainty. Either way, the team concluded that NPOs will have to adapt and develop new strategies to survive this crisis period, and to navigate the ‘new normal’ that will emerge post-pandemic (*ibid.*).

1.3.3 Theme 3: The role of culture in alleviating the spread of COVID-19

The purpose of this theme was to examine the role that culture has played in influencing government measures put in place to curb the spread of the virus. The research hypothesis was that, because cultural practices and beliefs vary within and between communities, these cultures must inform how a government responds to pandemics and other crises if such responses are to be effective broadly across any national population.

The research comprised a qualitative case study approach, examining by means of desktop research the effect of culture on pandemic responses in five countries: Iran, Italy, Japan, South Africa and the United States. This included looking at the responses of individuals, businesses and religious institutions to the government measures put in place to manage the pandemic. This research primarily drew on the theories of symbolic interactionism and structural functionalism, and of individualism and collectivism, as its theoretical frameworks (Vally et al. 2020).

Researchers found that the success and extent of restrictions such as social distancing and the closure of educational institutions, businesses and places of worship varied according to each country’s pre-existing cultural and social practices. Because South Africa is culturally diverse, the team focusing on Theme 2 strongly recommended that the responses of South Africa’s government should be culturally nuanced. While culture can often be ignored in times of crisis such as the COVID-19 pandemic, this research confirmed its variable impact on the effectiveness of any response.

1.3.4 Theme 4: COVID-19 lockdowns — can they help to govern the pandemic in Africa?

A national lockdown is a government-level strategy aiming to slow the spread of infection. There has been only limited analysis of what interventions are common to such strategies and how well lockdowns work, given that

the approach has never before been implemented on so widespread a scale globally.

By the end of March 2020, more than 100 countries had implemented lockdowns in one form or another (BBC News 2020). Researchers focusing on Theme 4 examined the strategies, policy tools and procedures that various governments activated to combat COVID-19 between 31 March and 30 April 2020. The team analysed data gathered within two frameworks: the 'Oxford University COVID-19 Government Response Tracker' (OxCGRT)³ and a framework designed by the team itself, a 'Government Counter COVID Intervention Framework'.

The researchers focused on a selection of African and non-African case studies (China, India, Italy, Nigeria, South Africa, South Korea and the United States) Their analysis compared the countries' positions on central issues including testing and tracing, lockdown rules, the role of public trust in decision-making and the influence of research on policy. Researchers identified common lessons that may assist African governments in responding to the pandemic, such as encouraging citizens' social distancing responses, and improving data and information systems' accuracy and responsiveness (Paterson et al. 2020).

1.3.5 Theme 5: Unlocking the 'lockdown mindset'

Implementation of the national lockdown in South Africa meant that traditional schooling could not continue. Because schools were declared high-risk areas in which the virus could spread rapidly, schools were compelled to shut down during the lockdown period. Teachers, learners and parents hoped somehow still to deliver curriculum learning, albeit remotely. Various providers made resources available for teaching and learning, but it is important to understand whether and how these resources were used, as well as why, if not.

A desktop review of the teaching and learning resources that were made available to teachers, parents and learners during the lockdown period formed one part of this team's research. It was complemented by a series of mostly quantitative surveys through which researchers sought to understand how teachers, learners and parents (through 230, 246 and 279 responses, respectively) had adapted to new ways of teaching and learning, if at all. The surveys also investigated whether teachers, learners and parents had access to the technology necessary to make use of online learning materials.

Researchers found that while a wealth of teaching and learning support had been made available, many of these were online resources, and parents and learners were not well-equipped to access these. Barriers therefore included

lack of access to the internet and personal devices, especially in poorer households where difficult decisions had to be made to balance household expenditure (Janda et al. 2020).

1.3.6 Theme 6: Ameliorating the impact of ‘fake news’ on high school learners during COVID-19

The onset of COVID-19 brought with it panic and confusion fuelled both by the novelty of the situation and by an alarming increase in ‘fake news’. This led the World Health Organization (WHO) to declare not only a pandemic but also an *infodemic*—that is, ‘the rapid spread of information of all kinds, including rumours, gossip and unreliable information’ (WHO 2018, p. 26). South Africa was not exempt.

The purpose of this theme was to investigate awareness among South African high school learners of fake news during the period of lockdown, including examination of its types and the skills needed to distinguish real news from the fake. In the context of a global pandemic, these skills save lives. The research comprised quantitative, closed-ended surveys of 24 parents and teachers, and 49 learners, identified on the basis of convenience and snowball sampling.

Among the recommendations that emerged from the research were that the curriculum in South African schools be expanded to include critical thinking and digital literacy to better equip learners and to stop the spread of misinformation. Recommendations also reached beyond the education sector into lifelong learning, with stakeholders in the media advised to continue to update their own skills such that they can filter out fake news and limit its dispersal (Motsepe et al. 2020).

1.3.7 Theme 7: Putting the individual at the centre — the role of digital identity during the time of COVID-19

The pandemic has changed the way in which we interact with one another and go about our daily lives. Digital platforms have become increasingly critical to working or learning remotely. With this increased online dependency, threats to data privacy are more relevant than ever. Contact tracing is a core strategy in managing the pandemic, but the personal data gathered may be misused. An important question is therefore not simply who owns this data, but whether individuals themselves should be given ownership and control of their personal data both generally and in times of crisis—a concept known as self-sovereign identity (SSI).

Using desktop research, the team focusing on this theme aimed to identify and understand examples of SSI in education internationally, and to identify

instances in which data ownership and control have been successfully decentralised, allowing individuals to protect, secure, control and verify their digital identities (i.e. records related to their education, training, skills, projects, job history, assessments and more). In this time of crisis, these questions were thought to have implications for BBB, whereby individuals might learn to leverage their digital identities to add value in the labour market and to access better career and development opportunities (Dale-Jones et al. 2020).

1.3.8 Theme 8: Governance and management — a higher education response to COVID-19

The researchers focusing on Theme 8 aimed to collate the responses of higher education institutions (HEIs) to the COVID-19 crisis. With traditional methods of teaching suspended, the disruption of students' learning has been unprecedented, highlighting the need for sound governance and management practices across HEIs.

In a desktop research exercise comparing the courses of action taken by each individual institution in South Africa, complemented by discussion among themselves, researchers hoped to identify practices that might inform policy. While local contexts may differ, it was anticipated that the project would highlight issues of governance and management common to all HEIs during a time in which they seek to deliver learning even as the realities of the pandemic continue to unfold.

Perhaps of utmost importance was the recognition that whilst pandemics such as COVID-19 launch countries and institutions into crisis mode, they also reveal opportunities that can push us towards a 'new normal' (Jappie et al. 2020). This involves the implementation of online teaching and learning but doing so in a way that is inclusive, and cognisant of challenges for and contexts of students, teachers and communities.

1.3.9 Theme 9: Education, inequality and innovation in the time of COVID-19

Acknowledging deep-rooted systemic challenges laid bare, this theme sought to explore whether the education system in South Africa might be overhauled during the crisis. The reality of the pandemic is that thousands of disadvantaged children across the country have been excluded from learning that has largely moved to online platforms and they have also been deprived of food⁴ (under the National School Nutrition Programme). Many are also denied escape from abuse and neglect.

The DBE's measures to mitigate the pandemic's impact on schooling have centred on online learning, such that only those learners with digital access have been able to continue their education in a meaningful way (Ntaka 2020). Recognising the exclusionary effect of these measures in a country marked by stark societal inequalities, the researchers sought to examine whether remote education might reach beyond online learning to include television and radio programmes, multimedia and printed material for disadvantaged learners living in poor communities. To this end, they engaged in desktop research using multiple sources and they distributed a series of surveys aiming to capture the experiences of learners (76), teachers (93) and parents or caregivers (275). They also examined whether such innovative strategies might be adopted to improve the quality of education available to disadvantaged learners in the long term.

While summarising their findings, researchers emphasised the concept of 'Do no harm'—that is, that the likely consequences of both short- and long-term interventions and policies must be considered. Whatever policies and plans are put in place both during and after the pandemic must not exacerbate existing inequalities, thereby disenfranchising disadvantaged learners yet further (Parker et al. 2020).

1.3.10 Theme 10: Lessons on how countries manage schooling both during and after disasters — a study of four cases

Since the implementation of lockdown and consequent suspension of educational activities, South Africans have had questions.

- What impact will this situation have on teaching and learning across the country?
- How can the education system still reach, teach and support learners now that all schools and department offices are in lockdown and teachers are no longer in classrooms?
- What processes should be followed in schools once the lockdown is lifted?
- How will we effectively 'reboot' the education system?

This theme offered researchers an opportunity to address these questions by studying—through desktop research of online sources—how countries that have experienced various disasters worked through the challenges imposed on their education systems. The team looked at disruptions to education resulting from natural disasters, wars and other conflict, as well as pandemics such as Ebola virus in West Africa and COVID-19 globally.

The hope was that these countries' disaster responses might inform recommendations applicable to recovery in the South African education system in the aftermath of COVID-19 (Govender et al. 2020).

1.3.11 Theme 11: Teacher choices in action — an enriching supplementary module for 'Teaching Practice' in 2020 and beyond

The closure of schools during the lockdown in South Africa meant that arrangements for compulsory teaching practice were thrown into disarray. The rapid rate at which the virus spreads has meant that neither qualified nor pre-service teachers are able to teach or to carry out their teaching practice modules safely in person in a school setting. There was therefore an urgent need to develop an alternative model for school-based teaching practice for pre-service teachers.

This theme provided researchers with a unique opportunity to understand how pre-service teachers develop expertise through initial teacher education and practice modules (Rusznyak et al. 2020). The researchers involved in this theme differed somewhat to the others in that they had already been collaborating for more than a year before joining the bootcamp. The on-going research collaboration between the teacher education experts has a practical aim: to develop a practice-focused online module that will supplement classroom-based teaching practice for pre-service teachers. The module will deliver learning to pre-service teachers about the choices they must make in the design and delivery of each of their lessons.

1.3.12 Theme 12: Innovative finance for education during and after COVID-19

With mounting pressure on the public purse as a consequence of the pandemic, there is an increasing need to explore and adopt alternative methods of financing education in South Africa (DeLoitte 2020) Researchers focusing on this theme sought to investigate the merits of the adoption of innovative financing to support the sector both in the present pandemic situation and beyond.

Innovative financing is an approach to funding organisations, businesses and projects that aims to optimise positive social, environmental and financial impact. Where existing commercial and philanthropic financial tools are used to enhance education and the tools do not produce satisfactory results, innovative financing creates new tools.

Researchers found that the combination of traditional and innovative resources has the potential to support the education sector not only during

the pandemic, but also beyond it, by increasing the effectiveness, efficiency and equity of current funding models (De Witt et al. 2020).

1.4 Cross-cutting dimensions

COVID-19 is impacting on individuals, families and human societies in many different dimensions. In the following sections we provide a thematic overview of the conditions that so many are experiencing.

1.4.1 Uncertainty and complexity

The threat of COVID-19 remains clear and present. The absence of an end to COVID-19 stretches into the future, the horizon marked by hope that a viable, safe and effective vaccine will be developed and distributed cheaply and on a massive scale.

Uncertainty impacts most immediately on individuals, communities and businesses in the form of anxiety about health, well-being and even survival, of themselves and others (WHO 2020a); uncertainty about the competences and capabilities of those charged with decision-making at government level is another factor at play (Devine Gaskell Jennings and Stoker 2020). Some researchers (Van Bavel et al. 2020) point that greater trust in government leads to more compliance with health policies such as quarantining, testing and restrictions on mass gatherings.

Many of the governments that ordinarily take ready responsibility for mapping out the path to recovery along multiple dimensions (see 1.1) have been caught off-guard by the path of the pandemic. In this space, social and political divisions have emerged, reflecting differences of opinion on the wisdom and effectiveness of measures such as lockdowns and the damage they can do. COVID-19 has catalysed yet further complexity, profoundly disrupting systems of production, transport and economic exchange at both global and local levels. These disruptions of regular—and hence taken-for-granted—processes and interactions are evident not only in governance and public administration, but also in our everyday commercial, community and family lives.

1.4.2 Risk, anticipation, opportunity and personal risk

Pre-pandemic, substantial risks were readily apparent, including those relating to poverty, wealth gaps and other forms of structural inequality, as well as a climate crisis. As a single event unprecedented in modern history, the COVID-19 crisis has introduced multiple new risk factors while exacerbating all of those already impacting globally. At the individual

level, awareness of personal risk has manifested in measures such as social distancing, now entrenched in the daily decision-making of some South Africans. For many, however, social distancing is precluded by living conditions: millions of citizens live in densely populated townships and informal settlements on peri-urban land, where household accommodation is crowded (Nyashanu Simbanegavi and Gibson 2020).

After the lockdown in South Africa in early 2020, the government emphasised the importance in workplaces of occupational health measures such as risk assessments, worker education, and workplace monitoring systems aiming to ensure compliance with safety protocols and to identify infections. In practice, however, while masks covering the nose and mouth are now mandatory in public places in South Africa, and the rule is enforced in shopping centres and workplaces, in the community people openly disregard it (Rossouw and Christian 2020).

1.4.3 Hunger, anxiety, depression, abuse and boredom

In countries across the continents—sometimes decisively, sometimes abruptly—governments have announced lockdowns as the primary proven means of limiting human-to-human transmission (HHT) by limiting people's ability to interact outside of their own households or within institutions such as hospitals and prisons. At time of writing, many people remain under or are returning to lockdown or partial lockdown conditions. However, confining people to their own homes and limiting their interactions exposes adults and children alike to risks other than the risk of infection, and they experience discomfort and frustration that comes of isolation—of stripping them of work, school, social activity and personal freedom.

Although lockdown in South Africa slowed the rate of COVID-19 infection, it has had a variety of negative personal and household consequences. Food insecurity and hunger are experienced in those households within which members were unemployed (and could not go out to look for work), or members could not go out to earn their daily income through piecework, hawking or casual labour, or members in employment were subjected to pay cuts or laid off temporarily (or permanently) (Durão Galloway Ramokolo 2020). For school-age children confined at home, the risks of lockdown include loneliness, boredom, depression and anxiety, including anxiety about infection. Children were also found to harbour fears about how they would cope when returning to school. This type of uncertainty was found to be most prevalent among those children who had limited or no contact with their school or teachers during the period of lockdown, and who had not been supplied with materials or exercises to keep them occupied and learning. Moreover, even among those children who had either or both, those

in low-income households living in a crowded home or informal dwelling reported struggling to find spaces in which to focus on their schoolwork (WHO 2020b; Nisa 2020).

Crucially, the lockdown in South Africa contributed to a spike in reported cases of gender-based violence and child abuse (Hartford 2020). Social workers observed that, for some children, the school is a safe, hygienic space in which they are guaranteed a meal—a safe space denied to them during lockdown.

1.4.4 Inequality, social cleavages and resources

Beyond immediate fears for their health, the risks most feared by individuals in employment during the pandemic period include closure of their employer's business, being furloughed or made redundant, pay cuts or reduction of hours. For managers and business owners, a prolonged global recession tops the list of feared risks, closely followed by bankruptcy, consolidation within an industry and a failure at the firm or even industry level to recover from the economic shock dealt by COVID-19.

The effects of the pandemic on the labour market were already being registered within the first quarter of 2020. By the end of March 2020, 41.7 per cent (8.5 million) young people aged 15–34 were not in employment, education or training (NEET) (StatsSA 2020). These young people were therefore likely to be dependants, deprived by lockdown of the opportunities they might otherwise have found for insecure and unprotected work within the informal sector as domestic workers, wait staff, car guards or farmworkers.

South Africa has a social grants programme, a mainstay of its national social protection system. Recognising the impact of the pandemic on those reliant on the programme, the government increased the amounts payable in social grants to some 18 million people, including those caring for some 12.5 million children, as well as the amounts payable to recipients of disability and old-age grants. It also introduced a specific grant, the Special COVID-19 Social Relief of Distress, payable from May to October 2020 to persons not receiving any form of income support, social grant or student stipend (Webb and Vally 2020).

In the lockdown, many more South Africans have been personally affected by the absence of or a decline in public services such as the payment of unemployment insurance funds or of social grants, the provision of basic services such as electricity by municipalities or national service providers, and in basic facilities provided in schools and other educational institutions. Public responses in the media, as well as public demonstrations in which

crowds risked COVID-19 infection, the activity of civil society organisations (CSOs) and even ad hoc protests suggest that this experience is influencing public awareness and understanding not only of the value and importance of public services, but also of unequal access to such services (Lancaster and Mulaudzi 2020; The Times 2020). This increasing awareness may inspire public demand that the South African government perform its functions with a keen eye to resolving these issues.

1.4.5 Information, accountability and responsiveness

In the research field, the volume of material related to COVID-19 available online continues to expand apace. The unfolding of the pandemic is continually feeding media and research activity. The surge in activity includes analysis of economic shocks to global and national economies (Carlsson-Szlezak, Reeves and Swartz 2020), commentary on the political and social disruption resulting from impacts on everyday life (UNWomen 2020), a substantial upswing in medical and health research (Weiner, DL, Balasubramaniam, V, Shah, SI et al. 2020), and explorations of varying cultural responses to the pandemic (Rathod 2020). Emerging fields of research related to COVID-19 span a wide array of disciplines, from economics to ethics. It is difficult for any one researcher to keep pace with the overwhelming volume of new analytical and empirical insights emerging.

Yet, at the same time, the pace of the pandemic itself has been a barrier to adequate management and governance data exactly when it is most critical to emergency decision-making. The speed with which COVID-19 spreads and impacts nationally makes it extremely difficult for government agencies to source timely data that are relevant to current events—as has been evident in relation to testing for COVID-19 infection (Kretchmar et al. 2020). As a consequence, national education departments have been under pressure to make policy decisions about whether or not to open schools after lockdown even as medical research globally lags behind, offering no clear and unequivocal insights into the infectiousness of children in schools. In this zone of uncertainty, government policy-makers risk cognitive bias—that is, selecting research and modelling outcomes that justify their preferred policy goals.

While good information is critical to good decision-making, it is apparent that the information available is not necessarily decisive for parents considering whether or not to send their children back to school. Trust is at play in these decisions, jeopardised by those parent's belief in their government's accountability and putting children's learning on the line where a government has performed below that parent's expectations, creating a crisis of trust.

Other than transactional financial information recorded online, government administrative and demographic data systems are not designed to track an event such as COVID-19, which disrupted socio-economic conditions within a matter of weeks. As a global emergency event, the pandemic has created an extraordinary upsurge in demand for data that is unavailable, leaving public- and private-sector decision-makers in similar predicaments. Such has been the impact of the COVID-19 crisis that demographic data collected only a few months before its onset may now be of limited value. The need to reset baselines will necessarily affect confidence in decision-making, including about the financial resources that should be allocated to recovery.

Data on the physical resources available in the education sector are the inputs on which education authorities base reasonable and workable decisions. The COVID-19 crisis has highlighted gaps in provision, however, and civil rights and advocacy groups are raising their voices to push for equal access to facilities in schools (Spaull and Jansen 2019; SAFLII 2020). In South Africa, the database of schools and school resources informs those demanding that the levels of basic facilities be raised in all schools. A substantial number of schools currently have no running water available, for example, meaning that learners cannot practise basic personal hygiene (handwashing), putting both them and teaching staff at risk of infection (Citizen 2020). At the government level, this data has advanced discussions regarding the DBE's accountability (Seekings 2020).

1.5 Structure

The 12 research themes on which the bootcamp research project, #OpenupYourThinking, focused are brought together here in five chapters. These chapters draw out the main findings and recommendations made by the 12 research teams.⁵

In Chapter 2, we argue that merely advocating for increased financial resources both during and after the current crisis is not enough; rather, a structured approach is required, blending traditional and non-traditional funding resources, and a strong collaborative model that secures flows to targeted priority areas. It is *innovative financing* models that will offer the key levers to 'Build Back Better' post-pandemic.

Chapter 3 draws attention to the vulnerability of personal data and the frequency with which privacy is breached online. Under lockdown, with limited services available, a streamlined and simplified process of verifying digital credentials is needed. We argue that COVID-19 has disrupted expectations such that there is increasing support for SSI in the education sector.

In Chapter 4, we explore the responses of government and of civil society to COVID-19, as well as the extent of collaboration between sectors. At its outset, the impacts of the pandemic and limited preparedness frustrated the co-ordination of multiple initiatives from various sectors; the crisis has, however, accelerated responsive co-ordination between CSOs. We consider here the opportunities that improved conditions for collaboration between government and civil society offer.

Chapter 5 looks at how technology can support self-organised learning and how, despite their limitations, these forms of learning present opportunities for children, adolescents and lifelong learners who would otherwise be denied access to quality education and learning, as well as for teachers.

In Chapter 6, we focus on communications under COVID-19 conditions, exploring the quality of communication between government and citizens, within families, and between schools and learners, and we consider the extent to which social media are more deeply embedded as a means of non-hierarchical engagement. Social media are a fertile ground for the dissemination of misinformation, fake news and malicious material, and children, their parents and their teachers must be equipped to think critically and filter that content.

Finally, in Chapter 7, we review the thematic outcomes of the research bootcamp, #OpenupYourThinking, through the lens of 'Building Back Better' (UNISDR 2017), and we draw out some future challenges and opportunities for research in Commonwealth countries other than South Africa.

Notes

- 1 The DHEST was formerly the Department of Higher Education and Training (DHET), and it remains known as such on the government website: see <https://www.dhet.gov.za/>.
- 2 See <https://www.jet.org.za/covid-19-research-response/south-african-bootcamp/themes>.
- 3 See <https://www.bsg.ox.ac.uk/research/research-projects/coronavirus-government-response-tracker>.
- 4 Equal Education and the Equal Education Law Centre entered into a court case against the DBE and eight provincial education MECs. This was to roll out the national feeding scheme to all learners in public schools during lockdown, and not just to the learners who had returned to school in-person. See: <https://section27.org.za/national-school-nutrition-programme/> for further details.
- 5 Each theme is explored more fully in a report available online at <https://www.jet.org.za/covid-19-research-response/south-african-bootcamp/themes>.

Chapter 2

Funding Education in a New Era

Chapter 2

Funding Education in a New Era

Zaahedah Vally and James Keevy

2.1 Introduction

Traditionally, in many countries across the world, the main source of funding for education is state revenue. In South Africa, education is funded primarily by the state, but there are also key partnerships between the state and other entities, such as corporations, non-government organisations (NGOs) and non-profit organisations (NPOs), and international development agencies.

While the government continues to earn revenue from taxes and large corporations can rely on their reserves, NPOs are heavily dependent on fundraising and donations for their continued operations. Such funds are scarce during health crises such as the current COVID-19 pandemic. Funding trends during crises appear to prioritise those NPOs operating in the health and security sectors (Rajab et al. 2020); those operating in education are deemed less critical. As a result, NPOs operating in the education sector in South Africa have been negatively impacted even though they work with the very young and are part of the social safety net. In their survey of 89 NPOs, the research team focusing on Theme 2, ‘A comparative study on the response of non-profit organisations in education to the COVID-19 pandemic’ (see 1.3.2), found that 22 (24.7 per cent) had been forced into complete shutdown, while 44 (49.4 per cent) had temporarily suspended and/or reduced their service delivery (Rajab et al. 2020). The team found that NPOs have cut their non-essential expenditure drastically and limited the scope of their operations, moving many services online, with inevitable impact on end users. The research team concluded that it is consequently essential that NPOs execute strong financial leadership, engage collaboratively with other key stakeholders and seek innovative methods of financing education in South Africa (*ibid.*).

The government has an equally important role to play in diversifying the education funding landscape in South Africa by collaborating with the private sector, as well as funding organisations, to ensure that quality education—spanning early childhood development right through to post-school education and training (PSET)—is accessible to all both now and in the future. The pandemic has catalysed collaboration between public and private investors (Mawoyo and Vally 2020; UN 2020), who are urgently

working to develop innovative financing in response to the funding crisis that COVID-19 represents for the education sector and to 'Build Back Better' (BBB) post-pandemic.

In this chapter, we will set out the norms for the funding of education in South Africa. We will explain the mechanisms that both state and non-state actors in education have adopted in response to the COVID-19 pandemic. Finally, we will conclude by outlining the key steps necessary to ensure that education initiatives in South Africa are sustainable in the long term.

2.2 Education funding norms in South Africa

The funding structure adopted in the education sector in South Africa consists of publicly voted funds, official development assistance (ODA), and private donations and investments (De Witt et al. 2020).

2.2.1 State funding

Publicly voted funds continue to make up most of this funding landscape, with up to 20 per cent of the national budget being allocated to education, comprising early childhood development, basic education, and post-school education and training (PSET) (Mlachila and Moeletsi 2019). This is indicative that public funds remain among the most important sources for the education sector. According to Black and colleagues (2015), most of the budget is allocated to basic education in South Africa, covering grade R (ages 4–5) through to grade 12 (ages 17–18). Basic education is funded jointly by the national Department of Basic Education (DBE) and the provincial departments of education, with the majority of funding going to the provincial departments of education (Black et al. 2015). Any learning that takes place outside of the schooling system is classified as PSET, meaning that this includes the funding of universities, technical vocational education and training (TVET) colleges, private institutions, apprenticeship programmes, in-service training and also, more broadly, adult and continuing education. The Department of Higher Education, Science and Technology (DHES) is exclusively responsible for funding PSET.

While the education budget has been protected and has increased over the last four years, De Witt and colleagues (2020) argue that this provides only a limited picture of the education sector in South Africa. In basic education, class sizes have increased from 41 learners in 2011 to 48 learners in 2016 (Spaull 2019; West and Meier 2020), especially in less-affluent areas, and Marais (2016) point out that South African classrooms are far too crowded to enable effective teaching and learning, with some schools

having in excess of 100 learners per class. The added pressure of rising teacher salaries, combined with these increased class sizes, means that the budgetary spend per learner actually *decreased* between 2011 and 2017 (Spaull 2019). While annual expenditure on basic education increased by 7.1 per cent between 2010 and 2017, inflation during the same period was 38 per cent and teacher salaries increased by 57 per cent, resulting in an 8 per cent loss of education spend per learner (*ibid.*). The bootcamp research of De Witt and colleagues (2020) also found that, while it meets the benchmark proposed under the Incheon Declaration (UNESCO 2016) adopted by members of the United Nations Educational, Scientific and Cultural Organization (UNESCO) in 2015 of allocating at least 4–6 per cent of gross domestic product (GDP) to education, South Africa's 6.2 per cent in 2018 does not match the investment in education of other members of the Southern African Development Community (SADC) countries such as Lesotho (11.4 per cent), Botswana (9.6 per cent), Namibia (8.3 per cent) and Zimbabwe (7.5 per cent).

The Theme 12 team and others (Black et al. 2015; Van der Berg and Moses 2012) argue that the current spend on education—especially on basic education—does not result in improved learning outcomes, which suggests the need for further research into the effectiveness of spending within education and has implications for the prioritisation of these funds. Black et al. (2015) mention that although South Africa has high school enrolment rates, educational outcomes in the country are considerably worse than in average developing countries. This is despite expenditure on education having increased between 2000 and 2010. For this reason, authors such as Boateng (2014) and Mbiti (2016), advocate for structural reforms that will overhaul the education sector in South Africa. The R500 billion stimulus package that the government has put in place to mitigate the effects of the COVID-19 pandemic means that departmental budgets will likely be constrained. An additional R130 billion had shifted between departments to address the current health crisis that COVID-19 has brought with it (Mathe and Maeko 2020), and it was unclear at time of writing whether the DBE and DHEST's budgets were among those reprioritised. The government's medium-term framework allows for the disbursement of funds only in three-year cycles; this means that any significant changes to budget allocations take a long time to enact and that the framework does not easily support emergency responses such as those demanded by the current pandemic (Business Tech 2020). As the rest of this chapter will highlight, this is one of the reasons why the education sector in South Africa would be well advised to adopt more innovative funding mechanisms.

Table 2.1 Government expenditure on education

Education sector	Audited outcome (ZAR billions)			Adjusted appropriation (ZAR billions)
	2015/16	2016/17	2017/18	2018/19
Post-school education and training	57.1	64.4	68.6	90.4
% of total government expenditure	4.4	4.7	4.7	5.7
Basic education	202.1	216.3	230.7	249.0
% of total government expenditure	15.5	15.7	15.7	15.7
Early childhood development	2.2	2.4	2.7	3.0
% of total government expenditure	0.17	0.18	0.19	0.19
TOTAL	261.4	283.1	302.1	342.5
% of total government expenditure	19.9	20.4	20.3	21.3

Source: De Witt et al. (2020, p. 20)

2.2.2 Official development assistance

Official development assistance funds provided through bilateral agreements between South Africa and other donor countries contribute to the country's public finances. According to De Witt and colleagues (2020), these funds are typically used to support private-sector organisations, NGOs and civil society organisations (CSOs), and they are managed by the National Treasury's International Development Co-operation Directorate. South Africa is currently receiving less in grant funding to the public sector. It is also worth noting that the bulk of ODA funding goes towards work in the social sector—particular to support the health sector in its efforts to tackle HIV/AIDS. The OECD indicates that the largest share of ODA in South Africa goes towards the social sector: South Africa was one of the top ten recipients for ODA dedicated to health in 2017 (OECD 2019).

The purpose of ODA is generally prescribed for innovative interventions and pilots, and it cannot be used as a stopgap for shortfalls in administrative responsibilities such as staff costs (*ibid.*). While the process of securing ODA funding commonly takes between 12 and 25 months, that time frame has been significantly compressed during the COVID-19 crisis.

In the education sector, there is an emphasis on drawing down ODA to fund youth employability programmes and teacher development. Examples of investments made through ODA in South Africa (rand-equivalent values

calculated based on the exchange rate at the time this report was prepared in June 2020):

- Primary Education Sector Support Programme—R2.4 billion;
- Education for Employability Programme—R603 million;
- Teaching and Learning Development Sector Reform Contract—R522 million;
- Promotion of Vocational Education and Training—R165 million;
- Skills Development for a Green Economy Programme—R180 million; and
- Digital Skills for Jobs and Income—R192 million.

2.2.3 Private local donors

Education receives a portion of its funding from local donors as corporate social investment (CSI); indeed, education is the sector most supported by CSI donations (Trialogue, 2019). It is estimated that CSI in 2019 injected R10.2 billion, with education receiving up to 50 per cent of this amount (Trialogue 2019). In response to the COVID-19 crisis and likely subsequent global recession, CSI is expected to decrease in the short and medium terms, with education consequently likely to be hard hit not only by the withdrawal of support, but also by the rerouting of funding towards the healthcare sector (De Witt et al. 2020).

2.2.4 Private investment

In their report on Theme 12, De Witt and colleagues (2020) suggest that private investment worldwide and in South Africa is increasingly targeting practices that align with the United Nations' Sustainable Development Goals (SDGs), and which target optimal financial and social impacts. However, private investors remain averse to investments that carry high risk or which do not suit their short-term profit motives. Education initiatives are typically long-term investments and linking inputs to outcomes is difficult; hence there may be limited incentive for private investment in the sector—even though there are nearing 100 capital investment funds seeking impact in South Africa (De Witt et al. 2020, p. 23).

2.3 What is 'innovative financing'?

In their research report on Theme 12, De Witt and colleagues (2020, p. 8) define *innovative financing* as 'the funding of organisations, businesses

Table 2.2 Investment strategies and types of innovative financing

Term	Definition	Source
Innovative finance	'... an approach to funding organisations, businesses and projects that optimises positive social, environmental, and financial impact. It uses all available commercial and philanthropic financial tools to support the growth of these initiatives, and when existing tools do not work, it creates new ones. This is done to improve developmental results by making funds go further and raising funds from new sources. These mechanisms are designed to complement traditional local and international resource flows.'	University of Cape Town Graduate School of Business Bertha Centre
	'Non-traditional applications of solidarity, public-private partnerships (PPPs), and catalytic mechanisms that (i) support fund raising by tapping new sources and engaging investors beyond the financial dimension of transactions as partners and stakeholders in development; or (ii) deliver financial solutions to development problems on the ground.'	World Bank (2009)
	'Mechanisms of raising funds or stimulating actions in support of international development that go beyond traditional spending approaches by either the official or private sectors, such as: (i) new approaches for pooling private and public revenue streams to scale up or develop activities for the benefit of partner countries; (ii) new revenue streams (e.g. a new tax, charge, fee, bond raising, sale proceed or voluntary contribution scheme) earmarked to developmental activities on a multi-year basis; or (iii) new incentives (financial guarantees, corporate social responsibility or other rewards or recognition) to address market failures or scale up ongoing developmental activities.'	Organisation for Economic Co-operation and Development (OECD) (2014)
Impact investing	'Investment seeking a financial return ranging from commercial to sub-commercial, with the intention of creating social or environmental impact and a commitment on behalf of the investor to measure that impact. It is an investment strategy rather than an asset class. 'The core characteristics and baseline expectations include (i) demonstrate intentionality; (ii) use evidence and impact data in investment design; (iii) manage impact performance; and (iv) contribute to the growth of the industry.'	Global Impact Investing Network (GIIN) ¹
Responsible/sustainable investing	'... a strategy and practice to incorporate environmental, social and governance (ESG) factors in investment decisions and active ownership ² . Sustainable finance encompasses financial models, services, products, markets, and ethical practices to deliver resilience and	South African National Treasury, Financial Sector Conduct Authority (FSCA); United Nations Principles

	long-term value in each of the economic, environmental and social aspects and thereby contributing to the delivery of the SDGs and climate resilience' (National Treasury 2020)	for Responsible Investment (UNPRI); Bridge Global Managed Growth (GRIA); Association for Savings and Investment in South Africa (ASISA)
Environmental, social and governance (ESG) factors	'A set of standards for a company's operations that socially conscious investors use to screen investments. Environmental criteria look at how a company performs as a steward of the natural environment. Social criteria examine how a company manages relationships with its employees, suppliers, customers and the communities where it operates. Governance deals with a company's leadership, executive pay, audits and internal controls, and shareholder rights.' (GSG 2018)	Global Steering Group (GSG) for Impact Investment
Catalytic investment	'... investment capital that is patient, risk-tolerant, concessionary and flexible in ways that differ from conventional investment. It is an essential tool to bridge capital gaps and achieve breadth and depth of impact while complementing conventional investing.' ³	Catalytic Capital Consortium
Concessionary finance	'... investment that offers more generous terms than market rate debt or equity. These terms may be lower interest rates, a longer pay-back period, or grace periods.'	OECD
Blended finance	'... a structuring approach that allows organisations with different objectives to invest alongside each other while achieving their own objectives (whether financial return, social impact, or a blend of both). The main investment barriers for private investors addressed by blended finance are (i) high perceived and real risk; and (ii) poor returns for the risk relative to comparable investments.' ⁴	Convergence
Patient capital	'... long-term capital where the investor is willing to make a financial investment in a business with no expectation of turning a quick profit. Instead, the investor is willing to forgo an immediate return in anticipation of more substantial financial or social returns down the road.'	Acumen
SDG investment	'Private sector allocation of capital towards advancing the SDGs and related targets, including (i) acting to avoid harm to the SDGs; (ii) benefiting stakeholders in relation to the SDGs; and (iii) contributing to solutions to the SDGs.'	United Nations Development Programme (UNDP)
Source: Cited in De Witt et al. (2020, pp. 8–10)		

and projects that optimises positive social, environmental and financial impact'. When existing commercial and philanthropic financial tools fail to secure the success of initiatives, new tools are developed to target the same ends. Because traditional resources are proving deficient in realising SDG 4, 'Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all', it is becoming increasingly apparent that innovative mechanisms are essential to complement existing local and international funding flows (De Witt et al. 2020).

2.4 Innovative financing during COVID-19

The adoption of innovative financing models is purported to be one of the key strategies that will stimulate innovation in government responses both during and after the pandemic. These responses must take into account issues of access, equity and quality across the educational system (De Witt et al. 2020). The pandemic creates a new impetus for finance providers to innovate resource mobilisation to ensure no one is left behind; new financial instruments such as the COVID-19 and Sustainable Development Goal (SDG) bonds, are emerging as a means of mobilising financial support to developing countries in responding to the health crisis (OECD 2020).

The research team focusing on Theme 12 argue that merely advocating for *increased* resources has not been shown to be effective; instead, they recommend a blend of traditional resources (government and donor funding) and non-traditional resources (such as private philanthropy), and a collaborative model to ensure that these collective funds flow to priority areas as needed. The priority areas that the team identify include public sector basic education, where the impact of the lockdown and subsequent restrictions aiming to stem the spread of COVID-19 in South Africa has included a review of the curriculum and trimming of teaching time. The costs associated with this are to be borne by the DBE's standard budget (De Witt et al. 2020). As noted by other authors such as Van der Berg and Moses (2012), Black et al. (2015), and Spaul (2019), the current education budget has not produced satisfactory results in terms of educational outcomes. It could thus be concluded that the additional costs associated with reviewing and trimming the curriculum will only further strain the budget.

The team also found that while funding for the National School Nutrition Programme has already been allocated, access to the programme is a challenge under pandemic conditions as evidenced in the court case between Equal Education and the DBE⁵. Policy-makers need to ensure that these issues of access are addressed effectively lest disadvantaged learners be further disenfranchised: in some instances, the meal offered to them at school is the only meal that they eat all day.

Likewise, as plans to deliver digital learning to children and adults across the country begin to take shape, ensuring disadvantaged learners in poor communities are given equitable access to these platforms will demand further budget. De Witt and colleagues (2020) emphasise that digital solutions are not a panacea and care should be taken to use them appropriately. They note too that locked-down schools are not without their costs: additional security is now needed to protect the school buildings and assets stored within them from vandalism and theft⁶.

The PSET sector faces similar challenges of access and equity, many universities moving their learning to online platforms. The research teams for both Theme 12 (*ibid.*) and Theme 8, 'Governance and management—[a] higher education response to COVID-19 (see 1.3.8) (Jappie et al. 2020) found that previously advantaged higher education institutions (HEIs) were able to make this transition more easily; however, they still could not successfully transfer all of their offerings to an online-only environment. Jappie et al. (2020) point out that students from backgrounds of poor socioeconomic standing have limited or no access to the internet. Furthermore, these students often live in overcrowded conditions which make a less conducive environment for learning. Not only are students finding themselves unable to afford online forms of learning, but also the costs to the HEIs of the transfer is extremely high. The licence fee for the Blackboard learning management system is some R4 million per year, for example, putting it out of reach for some institutions (*ibid.*). In addition, there are costs involved in building capacity among academic staff to properly prepare them to teach online.

What is clear is that issues of unequal access to quality education are being exacerbated by the COVID-19 crisis (De Witt et al. 2020; Jappie et al. 2020; Parker et al. 2020). One quick fix that the South African government has implemented is to supplement the National Student Financial Aid Scheme (NSFAS) allowance were provided with a learning materials allowance, payable by their learning provider after confirmation of the student's funding and registration (Jappie et al. 2020). If we are to 'Build Back Better' in the sector beyond the pandemic, however, we need to be thinking of innovative funding solutions such as alternative financing mechanisms that have the potential not only to positively impact learning outcomes, but also to dismantle the structural barriers to equal access to education.

2.5 Innovative financing beyond the pandemic to 'Build Back Better'

Making recommendations based on their observations, De Witt and colleagues (2020) point towards several innovative finance instruments and strategies that might be adopted for use in the South African educational

context. One suggestion is to establish education-focused innovative finance units at a sectoral level, including early childhood development, basic education, and PSET. Such specialised units might build much-needed internal capacity and also, importantly, establish a collaborative network of partners working towards institutionalising learning, as well as guiding future developments. These units would support the innovative finance agenda by evaluating and supporting mechanisms that seek to address gaps in the education market.

Another area that the Theme 12 team identifies in which innovative financing mechanisms might be used to better effect is that of information and communications technology (ICT). Given the rapid rise of remote and online learning solutions to school and other closures as a response to COVID-19, the long-term costs of this type of learning have not yet been assessed—costs that include data, hardware, teacher training and infrastructure where schools are practising social distancing within the classrooms (*ibid.*). Telecommunications infrastructure is poor in many South African provinces, meaning that vast investment will be essential to build better ICT access across the country. The team suggests that an innovative financing model such as performance-based funding, which links the achievement of learning outcomes to performance targets, might be one strategy that will preclude spending on ICT that is underused and ineffective (*ibid.*).

One form of performance-based funding is a model known as outcomes-based contracting (OBC). The contract is typically between an investor, an outcomes funder and an implementing partner, tying compensation to the achievement of specific outcomes. This is different from other traditional forms of funding contract in which payments are linked to the achievement of specific tasks in a project, programme or other initiative. De Witt and colleagues (2020) suggest that OBC would shift the risks involved in service delivery and the achievement of outcomes from the public to the private sector, freeing up government and donor capital for spending elsewhere, as well as improving accountability among the parties to the contract. The cost-effectiveness of OBC and other forms of performance-based funding is, however, yet to be fully established since the market is relatively immature. Moreover, OBCs take a long time to design (*ibid.*).

Despite this, the principles of instruments such as OBC might be incorporated into the current procurement processes of both the public and private sectors. The performance-based funding model is based on transparency, accountability, efficiency, monitoring and partnerships, all of which are critical to survival and success in a crisis. Lessons can be learned from the Impact Bond Innovation Fund (IBIF) launched in September 2018—an outcomes-based financing mechanism that seeks to improve early childhood learning and development outcomes in the Western

Cape (Gustafsson-Wright and Gardiner 2016; Mawoyo and Vally 2020). Stronger monitoring and evaluation techniques will enable tighter feedback loops through which the South African government can recognise high-performing programmes on which to spend more, and thereby build back both better and more efficiently (*ibid.*). The key will be for the private sector to complement work being done in the public sector—and not to seek to create a parallel education system that will exacerbate existing inequalities.

Notes

- 1 <https://thegiin.org/impact-investing/need-to-know/#what-is-impact-investing>
- 2 <https://www.unpri.org/>
- 3 <https://www.macfound.org/>
- 4 <https://www.convergence.finance/blended-finance>
- 5 See <https://section27.org.za/national-school-nutrition-programme/>
- 6 <https://www.gov.za/speeches/basic-education-condemns-vandalism-397-schools-coronavirus-covid-19-lockdown-17-apr-2020>

Chapter 3

Data Matters During
COVID-19

Chapter 3

Data Matters During COVID-19

James Keevy, Zaahedah Vally and Milisa Janda

3.1 Introduction

The COVID-19 pandemic has not only brought with it heightened awareness of issues of health, but also completely changed the ways in which we live and work. The lockdown and subsequent restrictions in South Africa, particularly social distancing, have meant that in-person social contact must be kept to a minimum; hence they have resulted in the increased use of digital platforms, not least in facilitating remote working and online education. Yet this brings with it an increased risk of data privacy breach. Myriad issues begin to emerge when we explore the topic of personal data, such as how, when and by whom it can (and should) be accessed and used, and—importantly—who can claim ownership of it. These issues are further complicated by their emergence within a crisis context in which national governments are attempting to balance national security with civil rights and individual freedoms.

This chapter will explore two central issues identified within several of the 12 research bootcamp thematic reports, as well as an issue both directly relevant to the bootcamp participants and more broadly at play in the new education environment—namely, the award of digital credentials for learning.

The first theme is that of data privacy—particularly, the potential use and abuse of personal data during the COVID-19 pandemic (Motsepe et al. 2020; Paterson et al. 2020; Dale-Jones et al. 2020). This is linked to the second: the emerging notion of self-sovereign identity (SSI)—that is, the idea that individuals should have ownership of and control over their own personal health, education and other data and digital identities (Dale-Jones et al. 2020; Dale-Jones and Keevy 2020).

The chapter closes with a focus on the relationship between the use of digital technologies and equality (Parker et al. 2020; Taylor et al. 2020).

3.2 Data privacy during the pandemic

The research team focusing on Theme 7, 'Putting the individual at the centre—the role of digital identity during the time of COVID-19' (see 1.3.7), argue that although technology allows for interactions and activities to continue during periods of lockdown, online interactions pose a risk of data privacy being breached (Dale-Jones et al. 2020). They argue that, during the time of the COVID-19 pandemic, basic freedoms have been restricted and that government authorities around the world have increased their monitoring of citizens in an effort to control the spread of the virus. While there seems to be evidence that contact tracing and testing is effective in managing this global pandemic (CDC 2020), the team notes in its report that the widespread surveillance, location tracking and restrictions on movement that are now commonplace bring with them risks and ethical dilemmas (*ibid.*). Recognising fears among citizens that the data collected in an effort to counter COVID-19 might be used for unintended purposes, without the consent of individuals, Dale-Jones and colleagues (2020, p. 2) affirm that 'provable trust is required to counterbalance the move towards mass surveillance during the pandemic, and current technology makes it possible'.

Among other examples of SSI in action on which the team focused its desktop research, the team reports on two new technologies developed rapidly specifically in response to COVID-19:

- the COVID-19 credentials initiative; and
- the COVI-ID contact tracing app.¹

Dale-Jones and colleagues (2020, p. 11) describe the COVID-19 credentials passport as 'a digital certificate that allows individuals to prove their COVID-19 status'. It allows an individual to prove that they have either recovered from the virus, tested positive for antibodies or received a vaccination. The team argues that, because the credential is accessible only by the individual and the organisation that provides it, such as the hospital or clinic that conducted the test, this is an example of SSI empowering individual privacy. The individual has authority over their own person data.

COVI-ID, explain Dale-Jones and colleagues (2020, p. 12), 'has been developed as a uniquely South Africa response to the pandemic', as an app that 'collects an individual's location and infection status and stores it on their phone using SSI rather than on a central database'. The app 'provides the individual user with full authority and control over who gets access to their health data, for what purpose and for how long, and provides a way to verifiably prove an individual's infection status in a reliable and secure way, without the loss of privacy' (*ibid.*).

The team concludes that these two initiatives not only highlight the relevance of SSI applications, ‘but also the realisation that it is possible (1) to gain traction and commitment quickly and effectively[,] and (2) to mobilise resources to make SSI projects a reality and at scale’ (*ibid.*). They also highlight the significance of the COVID-19 credentials passport in illustrating the possibility of global collaboration and creating interoperable systems based on global trust.

Dale-Jones et al. (2020) argue that the case for SSI in relation to digital learning during the COVID-19 pandemic is compelling. They claim that SSI technology is ‘scalable, interoperable and cheap’, that the crisis context in which it has been applied in these two instances demonstrates that it can be implemented effectively and at speed, and that it could be applied with ‘revolutionary’ effect in education (Dale-Jones et al. 2020, p. 13).

3.3 Micro-credentials and credential fluency

The micro-credential landscape is dynamic, described in frontier terms by Jirgensons and Kapenieks (2018) on the basis that a lack of clarity over standards, governance and administration processes is creating a vacuum that organisations such as Mozilla and others are seeking to fill (COL 2019). Micro-credentials focus on modules of learning much smaller than those covered in conventional academic awards, often allowing learners to complete the requisite work over a short period. In their most-developed form, micro-credentials represent something more than recognition of learning (Milligan and Kennedy, cited in James et al. 2017). While they are becoming more familiar elsewhere, the popularity of micro-credentials in Australasia is well noted (Selvaratnam and Sankey 2019; Oliver 2019).

At the conclusion of the South African bootcamp project, we offered micro-credentials to all participant researchers—both demonstrating and raising awareness of this new practice in real time. We worked with a provider on an SSI data model whereby the issuer delivers the credential to the holder through an identity ledger provided by a third party (Dale-Jones and Keevy 2020). The process allows the credential to be verified as authentically issued and correctly held. In this way, the bootcamp leveraged new thinking on the recognition of learning to put in place a record to which the participants could offer access in the future as a QR code on their CVs or even in their email signatures. Most participants opted to receive the micro-credential.

The value that micro-credentials can add reach beyond the relative ease with which they can be awarded—even in instances such as this, in which learning is informal and subject to no external quality assurance. While the goal is

not to bypass well-established government systems, but to enable learners to differentiate themselves fluently in an increasingly competitive marketplace (*ibid.*). As technology continues to develop, it is possible that the trend will be further entrenched, leaving behind the more traditional delivery and quality assurance regimes.

Just as the COVID-19 pandemic has presented the world with both threat and unexpected opportunities, so should education and training providers and quality assurance bodies look at credential fluency. Although employers might be added to this list, many already link credential currency with employability in a way that outweighs a third party's stamp of approval. The risk of fraud and misrepresentation cannot be ignored, but the chain between the credential issuer and the credential holder is immutable, and hence that risk is largely mitigated: the credential is readily verified once the holder provides their permission.

Digital credentials can support learner mobility and micro-credentials may be more transferable both within and across institutions. Micro-credentials can evidence non-traditional skills, boosting the credibility of apprenticeships and prior learning. They empower individuals to offer up a tapestry of lifelong learning. For these reasons and because of the changes wrought by COVID-19, there is increasing support for SSI in the education sector, most immediately where individuals have easy and safe access to their credentials. Importantly, there are also SSI solutions that enable those without smartphones or other personal devices to access their digital credentials (Dale-Jones et al. 2020). With SSI in-built, individuals have ownership of and control over that data, and it is the individual alone who can administer and choose to share their credentials (*ibid.*).

Given the take-up of digital learning in the pandemic period and likely beyond, the need for a streamlined and simplified process of credentialing that learning is clear. Digital credentials offer portable and granular validation of an individual's skills, and they can contextualise when and where those skills were acquired. In the aftermath of COVID-19, those seeking jobs in a depressed economic climate may seek to take control of their education and, more broadly, their career pathways. Through micro-credentials and digital credentialing, they will be able to secure and evidence their skills and achievements without relying on the layers of verification that can delay hiring decisions. As we seek to 'Build Back Better', digital credentials have the potential to increase the efficiency of education systems and to urge learners towards highly targeted training; they also have the capacity to reach learners and have currency across the world.

3.4 Digital technologies and equality

An increased need for online learning platforms during the COVID-19 lockdown and subsequent restrictions in South Africa was a common finding among more than half of the bootcamp research teams (Dale-Jones et al. 2020; Janda et al. 2020; Taylor et al. 2020; Jappie et al. 2020; Govender et al. 2020; Rusznyak et al. 2020; Parker et al. 2020). That trend is not unique, with most countries across the world seeking digital solutions as face-to-face tuition was variously restricted during the course of 2020. What became evident in the early days of the lockdown was that few public schools in South Africa were prepared for a transition to online learning (Hanekom 2020). With only a few exceptions, those that were comprised former Model C² and private schools; the deep and ongoing inequalities in the South African schooling system thus constituted a fault line on only one side of which learners could be reached using online methods.

Despite this, the resources that were made available online were so plentiful that civil society organisations (CSOs) had to help education departments to identify those that would be most appropriate for learners. NASCEE contributed in collaboration with the NECT to this effort. To allow broader and more equitable access to the relevant platforms, CSOs including the DG Murray Trust, in collaboration with the national Department of Basic Education (DBE), successfully lobbied telecoms companies for zero-rated services. The impact and reach of these programmes remain to be determined, but they have potential, all the more so when these solutions are considered within the broader framework of more conventional solutions such as radio and television. The team focusing on Theme 1, ‘Education at home’ (see 1.3.1), found that conventional paper-based solutions were largely neglected during this period, despite the many workbooks available to schools in areas in which digital options were less likely to succeed (Taylor et al. 2020). Difficulties in physically getting those books and resources to learners were obvious, but not insurmountable—but it was not clear from the evidence available to the team whether such measures had been taken in any instances and certainly there was no national directive to do so (*ibid.*). In addition, principals, teachers, learners and parents used WhatsApp groups as an alternative to the more sophisticated learning platforms. While this option still required participants to have access to data, the app’s simplicity and familiarity paved the way for its extensive use for communication, co-ordination and the sharing of documents during the period studied.

The COVID-19 crisis has accentuated the need for a broader digital platform to host resources for the South African public schooling system. The DBE Cloud³, established in early 2011 and hosted by Vodacom, has demonstrated potential to become that platform and it is hoped that lessons drawn from

the pandemic period will fuel its further development. The notion of a more interoperable basic education data system, including monitoring, assessment and even administrative systems such as the Data Driven Districts Dashboard⁴, offers the sector a vision of how new technologies might build the public schooling system back better in the aftermath of the pandemic and ultimately improve learning outcomes. Indeed, such an initiative is already under way in post-school education and training (PSET), and might prove to be illuminating (Shiohira and Dale-Jones 2019).

Notes

- 1 See <https://coviid.me/>.
- 2 Towards the end of the apartheid era, those schools reserved for white children were given the option of adopting one of four forms of privatisation or partial privatisation. Model C refers to those public schools that opted for partial privatisation (96 per cent of formerly white-only schools), whereby government continued to pay teacher salaries and supply a certain level of funding, while the school's governing body was allocated a higher level of autonomy than those opting for other models. These schools continue to be called Model C schools and are generally better resourced than the majority of public schools (Taylor et al. 2020).
- 3 <https://dbecloud.org.za/login/welcome.php>
- 4 <https://dbedashboard.co.za/Home/>

Chapter 4

Government and Civil
Society Responses in the
Time of COVID-19

Chapter 4

Government and Civil Society Responses in the Time of COVID-19

James Keevy and Andrew Paterson

4.1 Introduction

This chapter was prepared at a time when the COVID-19 pandemic had yet to reach its peak in South Africa. It explores the preparedness and agility of both the government and civil society structures during the early months of the pandemic, and it demonstrates the constraints faced by many governments across the globe as they scrambled to adjust their education systems for the coming constraints. While in South Africa, as in many cases, these systems were fragile before the pandemic, the pace of change accelerated during 2020, ranging from a focus on the quality of learning outcomes to the provision of basic amenities such as running water and functional toilets, and improvements that had been slow to become a priority.

The chapter shows how, in this state of flux, it was difficult to co-ordinate the responses of government and civil society. In this chapter, we offer a brief account of the government response and we follow this with an account of the response among civil society organisations (CSOs). We close the chapter with some key learning that both governments and CSOs might take from the experience, and we make suggestions as South Africa looks ahead with uncertainty.

4.2 The government response in South Africa

According to the team responsible for researching Theme 4, ‘COVID-19 lockdowns—can they help to govern the pandemic in Africa?’ (see 1.3.4), ‘governments are the primary instruments according to which decisions are supposed to be made in the interests of the wider society’; ‘governments have to intervene as the primary interface between societies and other economies and threats of war, pandemic and climate change’ (Paterson et al. 2020, p. 5). In this chapter, we will consider the challenges that the South African government faced in playing this role during the early stages of the COVID-19 pandemic—especially in the education sector and particularly

in collaboration with civil society. While its initial response was strong and proactive, it became harder for the government to maintain its momentum as the pandemic progressed and public trust diminished (Grobler 2020).

The education sector in South Africa comprises four broad areas:

- early childhood development (ECD), overseen in part by the Department of Social Development (DSD) and the Department of Basic Education (DBE);
- basic education, overseen by the DBE;
- post-school education and training (PSET), overseen by the Department of Higher Education, Science and Technology (DHEST); and
- technical vocational education and training (TVET), also overseen by the DHEST.

In each of these, the response of the bodies responsible to COVID-19 differed.

The ECD sector—historically fraught, with low levels of collaboration (Okeyo Lehmann and Schneider 2020), further exacerbated by a major fault line between the DSD and DBE, and also in the midst of a function shift of Grade R (ages 4–5) from the DSD to DBE (Parliamentary Monitoring Group, 2020)—was by far the least prepared of all the education sub-sectors in South Africa (Wills Kotze and Kika-Mistry 2020). Early childhood development centres were closed, together with schools, colleges and universities, at the start of lockdown in South Africa and their reopening seemed to be a low priority for a government dealing with many concurrent crises. At the time of writing, the ECD sector was still in flux and informal centres were on the rise, while formal providers were uncertain what processes they were to follow. Working parents, under pressure to increase their productivity even while working from home, were faced with seeking care for their young children even as safety protocols and broader national planning remained unclear.

Basic education generally received the most attention from the South African media. The Minister of Basic Education announced the closure of all schools across the country on 18 March 2020, directly impacting on nearly 10 million schoolchildren (Parker et al. 2020). While this initial response was definitive, the DBE then faced responsibility for plugging the gap left by more than 25,000 schools distributed across nine provinces in a public schooling system that was imperfect even pre-pandemic (Spaull and Jansen 2019).

Supported by the National Education Collaboration Trust (NECT), an organisation dedicated to strengthening partnerships among CSOs and between CSOs and government, the DBE moved as rapidly as it could to develop protocols and guidelines for public schools, focusing most keenly

on basic necessities such as access to water, hygiene and personal protective equipment (PPE). However, public pressure and a vocal teachers union contributed to delay several media briefings and communications about the reopening of schools, damaging public trust (Mlamla 2020). Action taken at the provincial level further complicated matters: the Western Cape Education Department, for example, moved ahead with its phased reintroduction of learners in Grades 7 and 12 (ages 11–13 and 17–18) to schools on Monday 1 June despite instruction from the DBE to wait (eNCA 2020). Communicating a framework for curriculum recovery in mid-June (Department of Basic Education 2020) helped to restore some faith in the DBE and the public schools system; private schools, however, were not part of the same exercise and it fell to the Independent Schools Association of South Africa (ISASA), a voluntary association of independent (private) schools, to play the key role in their response¹.

The response in the TVET sector, overseen by the DHEST, was comparatively low-key and largely at the institutional level. All 50 public TVET colleges across South Africa were closed under the national lockdown, but learners variously returned according to programme and year between June and August 2020. Some of the more affluent colleges were more proactive in taking steps to protect learners and staff, but there is no doubt that the TVET sector has been slow to respond².

Universities were arguably more prepared to recognise and respond to the crisis. The team responsible for researching Theme 8, ‘Governance and management—[a] higher education response to COVID-19’ (see 1.3.8), noted that the crisis ‘galvanised [higher education institutions (HEIs)] into reflection and action, for instance, regarding how we can tap into digital technologies and other creative ways of better serving the needs of higher education and addressing latent disruptors like COVID-19’ (Jappie et al. 2020, p. 4). In the early stages of the pandemic, the DHEST focused largely on the repatriation and/or housing of foreign students; its subsequent interactions with HEIs focused largely on their preparedness to provide online tuition. Universities South Africa (USAf) and organisations such as the Council on Higher Education (CHE) remained relatively uninvolved. The government’s National Student Financial Aid Scheme (NSFAS) continued to deliver allowances to students even during the lockdown period and many institutions also paid grants to students before the lockdown, to ensure that they had the funds to remove themselves from campuses. The NSFAS continued to engage with students within a virtual contact centre established on both web platforms and social media.

Overall, HEIs demonstrated tenacity, some public universities transitioning to online course delivery at short notice and, in some cases, even providing laptops to disadvantaged students (Jappie et al. 2020). The output of Theme

11, 'Teacher choices in action—an enriching supplementary module for "Teaching Practice" in 2020 and beyond' (see 1.3.11), will surely stand out as evidence of how higher education was indeed able to respond in an agile and evidence-based manner (Rusznyak et al. 2020). Yet the efforts elsewhere in the education sector were less well directed. Responses in ECD and TVET at the time of writing remain uncertain, and in basic education, while the scale and geographic spread of COVID-19 in the school system in South Africa has had inevitable impact, the risk that an inadequate response poses to school-level learning is significant. Internationally, there is increasing consensus that disadvantaged children are exposed to more risk out of school than they are when in class (Parker et al. 2020); South Africa, like other countries, is struggling to balance these risks.

4.3 The civil society response in South Africa

Civil society can be described as comprising those:

... organizations working in the interest of the citizens but operating outside of the governmental and for-profit sectors. Organizations and institutions that make up civil society include labour unions, non-profit organizations, churches, and other service agencies that provide an important service to society but generally ask for very little in return.³

South Africa's civil society sector is strongly represented, not least as a legacy of activism and volunteerism during its apartheid years. As Volmink and Van der Elst (2019) note, non-government organisations (NGOs) have been and remain instrumental in key areas including advocating for rights-based governance, policies and laws, holding the government accountable for its legal and development responsibilities, and delivering critical services such as education to a disenfranchised majority. In modern-day South Africa, most NGOs operate somewhere on a spectrum that ranges from pure service delivery (mostly rural-based and servicing the most disadvantage), through advocacy- and policy-orientated (including a few NGOs with research capabilities), to those that focus mainly on holding government accountable.

The pandemic, placing incredible strain on governments across the world, has changed that in South Africa to some extent. Few governments were properly prepared for the scale of the crisis and the government of South Africa was no exception (*ibid.*), its education departments being particularly susceptible to negative impacts as the team responsible for researching Theme 9, 'Education, inequality and innovation in the time of COVID-19' (see 1.3.9), note (Parker et al. 2020). In this fraught space, NGOs approached the government. The NECT, formed in 2013, and the National Association of Social Change Entities in Education (NASCEE), formally constituted in 2019, proposed joint working groups, relieving some of the pressure on

government, and several consultations followed. While this was not without risk to either party, it centred on the needs of learners and a collaborative model began to take shape. The NECT and NASCEE also played a leading role in providing support and guidance to other CSOs working in education.

As an umbrella body, NASCEE could be broadly described as at the ‘advocacy- and policy-oriented’ point on the NGO spectrum; those NGOs delivering services to communities could simply get on with that work, with or without guidance from government. In some cases, such as in the Gauteng province, their independent action ran afoul of local authorities (Maromo 2020). Those NGOs more used to holding government accountable demonstrated cautious optimism at the outset of the pandemic, but that optimism faded as the crisis deepened and some took their dissatisfaction to the courts (Southern African Legal Information Institute (SAFLII) 2020).

The NECT, meanwhile, remained closely aligned to the DBE and did its best, even with limited capacity, to provide support and guidance wherever possible. The DHEST and DSD remained more distant, but there is opportunity for CSOs to support these sectors both as the pandemic continues and in its aftermath.

Looking towards 2030, South Africa’s 2012 National Development Plan (NDP)⁴ (National Planning Commission 2012) charts a strategic path not only for NGOs, but also for civil society at large, as well as the business community, in partnership with the government—a path that made no provision for the type of global crisis in which we now find ourselves. Nonetheless, the momentum towards shared responsibility for implementing the social compact embedded within the NDP is more important now than ever (Volmink and Van der Elst 2019).

4.4 Key learning for government and civil society

Based on their mixed-method research of Theme 2, ‘A comparative study on the response of non-profit organisations in education to the COVID-19 pandemic (see 1.3.2), Rajab and colleagues (2020, p. 40) recommend ‘better prepared leadership’ among CSOs. Contingency planning, communication and governance structures, as well as support and guidance for their own staff, are areas on which CSOs are advised to focus.

Closer collaboration between CSOs, nationally and internationally, can also ‘mitigate the destructive effects of a crisis like COVID-19’ (*ibid.*). Partnerships among the NASCEE, the NECT, the Independent Philanthropy Association of South Africa (IPASA), and the South African Monitoring and Evaluation Association (SAMEA) would help them to secure access to scarce resources, to financial support and to information, building both strategy and

agility. Likewise, closer collaboration between NPOs, and that the DBE has asked the NECT to oversee an external monitoring process—a COVID-19 civil society task group (CSTG)—to ensure that it is complying with COVID-19 directions and regulations is a positive sign (NECT 2020).

In relation to Theme 10, 'Lessons on how countries manage schooling both during and after disasters—a study of four cases' (see 1.3.10), Govender and colleagues (2020) found that the countries studied commonly focused on alleviating financial distress for citizens affected by lockdowns and other restrictions, emphasising emergency response plans and business rescue. South Africa is no exception, moving at speed early in the pandemic to provide tax breaks and support to the unemployed and most vulnerable. However, any such first-level response must be followed by a more sophisticated and evidence-based strategic approach and, in the case of education, this has so far been achieved only in part.

The team researching Theme 10, found that the South African education departments' pandemic response emphasised immediate financial needs (Govender et al. 2020). Like India and Nigeria, however, South Africa has had to borrow funds from international financial institutions (IFIs) to meet these needs despite its budget already being in deficit and that borrowing is expensive to South Africa after downgrades of its currency rating (*ibid.*).

In Theme 12, 'Innovative finance for education during and after COVID-19' (see 1.3.12), De Witt and colleagues (2020) identified another important and also underutilised lever that might support stronger government responses. The research team found that the COVID-19 pandemic has accelerated the urgency with which these mechanisms are to be brought online, and they urge that 'we bring all our collective complementary and supplementary resources to bear on this crisis and the period to follow' (De Witt et al. 2020, p. 8). Any government has only limited internal capacity to capitalise on local private-sector initiatives and emerging global best practice; the team's proposal of a network of partners that can systematically support this agenda, including in the arenas of ECD, basic education and PSET, is a good call, as is their proposal that NGOs be not only as delivery partners, but also incubators for the public-sector system, supporting flexibility, innovation and additional funding streams (De Witt et al. 2020).

The emerging collaboration between NASCEE, IPASA and SAMEA is another important positive outcome of this period of crisis. The three associations are currently engaged in a 'deep collaboration for deep change' (Head 2003, p. 47), with a month-long monitoring and evaluation research bootcamp scheduled for late 2020 at time of writing. While the detail of the collaboration will develop over time, what is evident at the time of the writing is that these three associations offer a unique line of sight across the

education value chain that can only benefit the system as a whole beyond the COVID-19 period.

This chapter has provided a brief overview of the main responses from government and civil society during the early weeks of the COVID-19 pandemic in South Africa, drawing together the findings of several of the 12 thematic research reports emerging from the bootcamp initiative, #OpenupYourThinking. It does not seek to be comprehensive in its scope and, by the time it is published, several new initiatives may have emerged, while others may have fallen by the wayside. The question that remains is: how do we ‘Build Back Better’?

Focusing on Theme 9, ‘Education, inequality and innovation in the time of COVID-19’ (see 1.3.9), Parker and colleagues (2020) report on the ways in which the pandemic has highlighted the importance of building support into all aspects of the education system, and they caution that the levels of anxiety and stress that have made learning during lockdown difficult will make re-entering the school environment equally so. Access to the education system in South Africa, like those of many countries developing and developed alike, was unequal before the pandemic period; the pandemic has sent a sort of ‘accountability shock wave’ through this and other sectors, triggering the release of emergency funds and putting senior officials in the public spotlight. Under its heat, the transactional relationships between government and CSOs are complicated—but perhaps the collaborative partnerships that are taking shape are indicative that we might be able not only to build back our education system better, but also to restore the covenants between government and civil society based on ‘universal values, such as the dignity of the human person whatever [their] race, gender, background or beliefs; the importance of promoting the common good that transcends individual interests; and the responsibility for stewardship, with concern not just for ourselves but [also for] future generations’ (Vormink and Van der Elst 2019, p. 25)?

Notes

- 1 <https://www.isasa.org/school-closure-and-implications-for-independent-schools/>
- 2 <https://www.sabcnews.com/sabcnews/sasco-to-go-on-national-day-of-action-over-condition-of-tvet-colleges/>
- 3 See <https://study.com/academy/lesson/what-is-a-civil-society-definition-examples.html>.
- 4 <https://www.gov.za/documents/national-development-plan-2030-our-future-make-it-work>

Chapter 5

Using Curriculum
Technologies to Respond
to COVID-19 Closures

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Using Curriculum Technologies to Respond to COVID-19 Closures

Milisa Janda and Andrew Paterson

5.1 Introduction

During the COVID-19 pandemic, schools and universities have been recognised as high-risk areas in which infection could spread easily; government measures, including lockdown, have therefore seen schools closed—with every day of closure risking lost learning. The current crisis consequently urges us to explore and envisage new ways of teaching and learning outside of the traditional school or university environment.

In this chapter, we discuss the approaches that the South African government, schools and universities have taken to maintaining teaching and learning routines during times of lockdown and other restrictions. We look at broadcast and online teaching, and at the learning resources provided by schools, non-government organisations (NGOs) and government, at other delivery channels including websites and mobile applications, and at innovations that have been introduced to support teaching and learning continuity. The chapter then explores learners' experiences at home, and how socio-economic status and home environments have influenced learning routines. Online education is playing an important role, but the move to virtual learning risks further widening the inequality gap in the South African education system (Kronke 2020), with only those with ready access able to continue their studies.¹ This brings into sharp focus the role that stakeholders such as regulators, telecommunications companies and consumers can play in financing access to data for education purposes. The chapter also considers what curriculum support has been provided to and is required by students, caregivers, teachers and non-profit organisations (NPOs) working in education. It goes on to draw some conclusions about how we might develop a more structured approach to online learning.²

The national lockdowns implemented in many countries across the world resulted in the complete prohibition of in-person contact for education services. As Paterson and colleagues (2020) note, education departments were put under pressure to plan and implement alternative methods of teaching and learning at short notice. The chapter first sets out to provide context for their efforts, with reference to online learning and its role during the pandemic.

Our focus then moves to the household level, and we examine how parents and caregivers have responded to the increased responsibility demanded of them as a consequence of school closures. This analysis shows how, as dedicated as parents and caregivers may be, they struggle to cope with the situation, drawing almost solely from their own personal and household technology resources to support their children's schoolwork. We consequently look at the experiences of parents and the lessons they appear to have learned from this major disruption to their lives in some detail.

A further disruptive factor was that while online access to learning may be a viable option in theory, households and parents were unprepared in practice. Parents were not certain how to incorporate television or online resources into their children's learning-at-home experience and many households struggled with access to online resources because of high data costs or limited access to devices. The chapter thus goes on to explore these issues and the trends that are influencing development of the online learning domain.

Finally, we argue for a structured approach to building an online space that can be more easily mobilised to benefit learners, not only during but also long after the current crisis period.

5.2 Approaches to maintaining teaching and learning routines during the COVID-19 crisis

At the beginning of the national lockdown, South African Minister of Basic Education Angie Motshekga explained that the primary aim of the Council of Education Ministers (CEM) of the nine South African provinces at that time was to ensure that children remained engaged and continued with their education. The Minister noted that the government would be focusing first on encouraging the development of programmes that promote teaching and learning at home by making online resources available to learners, teachers and parents, and then on preparing for recovery as children returned to school (Motshekga 2020).³

In their report on Theme 4, 'COVID-19 lockdowns—can they help to govern the pandemic in Africa?' (see 1.3.4), Paterson and colleagues (2020) observe that in Bihar State, India, after school closures government decided to promote learners in classes 1-8 to the next school grade in 2021 without requiring them to pass the 2020 examination, whereas students in class 9 and 11 would be promoted based on internal assessment. The team argues that promoting learners to one grade without completing the curriculum of another and without evidence of their adequate performance will complicate teaching, imposing strain on teachers and fuelling problems for learners as they progress through the school's system. Moreover, the team notes the low socio-economic status of the children attending public schools in Bihar

and suggests that the shortfalls in learning may disadvantage them further. In their report on Theme 10, 'Lessons on how countries manage schooling both during and after disasters—a study of four cases' (see 1.3.10), Govender and colleagues (2020) describe strategies developed in Singapore, the United Kingdom, the United States and Vietnam to prevent the spread of COVID-19 where in-person schooling has continued or resumed after a national lockdown. The measures taken have included:

- systematic monitoring of learners' body temperatures;
- postponing all social activities and suspending extracurricular activities;
- increasing spaces between learners, including rearranging desk layouts and dividing classes into smaller groups;
- shortening the school day and/or the school week;
- separating classes into groups that attend schools on alternating days and duplicating teaching;
- suspending recess and the use of common areas, including learners eating lunch in their classrooms, or staggering lunchtimes to limit movement around the school;
- keeping learners in classrooms and rotating only teaching staff;
- requiring teachers and other staff to practise social distancing for teachers and other staff; and
- limiting those learners attending school to only those preparing for examinations (Govender et al. 2020, p. 32).

Beyond the school system itself, Govender and colleagues (2020) note the implications of the prolonged closure of schools on teacher development programmes and the approaches some countries have taken to sustain them.

- Japan and China have developed online teacher training courses.
- In the United Arab Emirates, teacher qualification examinations were postponed, while administrative and teaching staff received continuous specialised training using new technologies.
- In Chile, online learning was used to share good teaching practice through webinars and to provide online training for those requiring digital skills.
- In Spain and Guatemala, education departments 'introduced platforms through which teachers, parents and caregivers [could] share and co-build learning processes and guidelines to ensure the continuation of learning offline' (Gustafsson 2020, cited in Govender et al. 2020, p. 32).

Across higher education more broadly, in-person classes were cancelled and remote teaching methods implemented to plug the gap. Minister of Higher Education, Science and Technology, Blade Nzimande affirmed, however, that there should be no pause to the 2019/2020 academic year (Jappie et al. 2020, p7) and that all students be given a fair opportunity to complete the academic year 2020⁴, and hence higher education institutions (HEIs) have been motivated to maintain delivery of their academic programmes. The Department of Higher Education, Science and Technology (DHES) also made allowances for students funded through the National Student Financial Aid Scheme (NSFAS) to continue receiving grant payments during the lockdown period, with many institutions paying students beforehand to ensure that they had the necessary funds with which to leave campus.

In their report on Theme 8, 'Governance and management—[a] higher education response to COVID-19 (see 1.3.8), Jappie and colleagues (2020) note that, at the time of their research, no changes to NSFAS funding for qualifying students in 2021 had yet been made—although this may not remain true as the costs of different scenarios are modelled. They conclude, based on their desktop research, that: 'This crisis represents an unprecedented occasion for higher education to evaluate its preparedness for new changes. It has also galvanised us into reflection and action, for instance, regarding how we can tap into digital technologies and other creative ways of better serving the needs of higher education and addressing ... disruptors like COVID-19 (Jappie and colleagues 2020, p. 4).

5.3 Broadcast and online teaching and learning resources

In South Africa, several resources have been made available through the Department of Basic Education (DBE) in collaboration with key partners to ensure that teaching and learning continues. These include lessons broadcast by public and private television channels (SABC, eTV and DSTV), as well as mainstream and community radio stations. Seeking insights into Theme 1, 'Education at home' (see 1.3.1), Taylor and colleagues (2020) conducted interviews with families, asking parents and caregivers how they were supporting learning at home. The team found that only 13 per cent of families interviewed reported using television as an educational resource before the pandemic period, yet 94 per cent of families reported owning a television.⁵ Janda and colleagues (2020) likewise found that most (91 per cent) of the parents they spoke to in their exploration of Theme 5, 'Unlocking the "lockdown mindset"' (see 1.3.5), had access to television in their homes.⁶ The findings are indicative that television is an underexploited resource, as also supported by the National Association of Broadcasters (NAB) second State of the Broadcasting Industry Report (2020) and the General Household

Survey of 2018 (STATS SA 2018) that indicates that more than four-fifths of households owned television sets (82.2%).

Resources available in partnership with telecommunication networks aiming to facilitate learning from home include electronic readers on different platforms made available by the main national mobile phone service providers, Vodacom, MTN, Telkom and Cell-C, such as free access to Siyavula Maths and Science support in partnership with MTN, and free access to the Vodacom Virtual Classroom. The Theme 10 research team notes that there are additional resources available in the form of online portals and e-learning platforms delivered by private-sector organisations and education NPOs, including Vodacom e-school, Telkom e-education, Mindset Learn and Khan Academy, as well as digital platforms Digital Classrooms, African Story Book and Xander Apps (Govender et al. 2020).

Govender and colleagues (2020) identify the National Education Collaboration Trust (NECT) as a key participant in the drive to deliver learning remotely. It has disseminated weekly curriculum content and messages to a range of stakeholders, including subject advisors, teachers, district steering committees, provincial subject specialists, circuit managers and parents, with the aim of keeping professionals and community leaders engaged with learning.⁷ The NECT, in partnership with the DBE, has also broadcast tutorials to mitigate the loss of teaching time resulting from measures aiming to stem the spread of COVID-19. Resources made available on the DBE's own website to support learners, teachers and caregivers to support learning at home include past examination papers, links to other online content, and material such as e-textbooks, teacher guides and study guides.⁸

Various NPOs have also made a range of resources available on their websites. This does not mean, however, that parents and caregivers have uncritically accepted everything that NPOs have offered. Govender and colleagues (2020) give the example of Africa Teen Geeks, an NPO aiming to eliminate barriers faced by disadvantaged communities pursuing technology, engineering and mathematics qualifications. African Teen Geeks launched a national lockdown initiative that included online classes and reading sessions, whereby South African celebrities read to primary school learners in their home languages, and teach English and life sciences to high school learners. The initiative was criticised on social media for using celebrities to facilitate teaching and learning rather than qualified teachers.

The desktop research conducted by Janda and colleagues (2020) also found that while there are many resources available online for teachers, learners and parents, there is a notable lack of offline resources. The authors argue that this finding is significant because these are the only resources available to a large

percentage of learners—notably, those in rural areas, as well as those in urban areas with no access to smart devices or to the internet. The unequal impact of this on achievement may be compounded by the team's finding that online content is both practical and engaging, comprising video tutorials, daily online activities with games, and mobile applications for learners, as well as guidelines for parents.

The Theme 5 team found maths and science resources to be the most available (*ibid.*). On the one hand, these are two of the subjects most in need of improvement in South African schooling; on the other, those learners not taking these subjects may be marginalised. The team found too that only a small percentage of the online resources accessed were zero-rated for cost. South African government regulators have appealed to telecoms companies to support online teaching and learning by zero-rating educational platforms and content, and this is the subject of ongoing negotiations (ISPA 2020). In these circumstances, even where learners have the technology, the cost of streaming and downloading available resources may be a challenge, putting the educational benefits of online access out of their reach.

Govender and colleagues (2020) discuss some distance learning solutions suggested by the United Nations Educational, Scientific and Cultural Organization's International Institute for Educational Planning (UNESCO IIEP) to facilitate learning during the COVID-19 pandemic (UNESCO IIEP 2020). These include 'digital learning management systems such as Google Classroom which helps classes connect remotely, communicate and stay organised; and Paper Planes, an initiative that matches individuals with personal tutors for 12–16-week sessions conducted through video conferencing platforms' (Govender et al. 2020, p. 31). The team highlights Rumie⁹ as a particularly interesting platform whose mission is to remove unfair barriers to learning by using technology to freely share expert knowledge with those who have most to gain from it. Govender and colleagues (2020) assert that initiatives providing tools and content to enable lifelong learning for underserved communities offers hope that at the same time as unequal access to technology exposes gaps in societies, it promises the possibility of bridging those gaps.

5.4 Experiences of learning at home

In their study of education in homes under lockdown, Taylor and colleagues (2020) found that all caregivers reported helping their children with homework before the COVID-19 crisis. Moreover, they found that family members reported having taken responsibility in some capacity for educating learners before the lockdown:

- in five families interviewed, parents shared responsibility;
- in seven families, one parent took sole responsibility;
- in five families, siblings played an important role in educating other children in the home; and
- in three families, the learners took responsibility for their own education (*ibid.*).

The Theme 1 research team observed that this support took various forms, with the majority of the 16 families interviewed ‘helping with specific homework exercises; organising school calendars; preparing children for assessments; and motivating them to learn’ (Taylor et al. 2020, p. 11). Most respondent households stated that, before South Africa instigated a lockdown, they had used the internet as a resource to educate their children, using devices such as computers, tablets and smartphones; most also stated that they used school resources, with over half specifying textbooks. Caregivers also noted using library books, television, newspapers, tutoring books and, to a lesser degree, other educational materials already in the house.

Similarly, in research into Theme 5, Janda and colleagues (2020) found that learners themselves reported using several types of resource for their studies at home, including textbooks, study guides, subject-specific learning materials and online resources. While 68% of the 246 learners responding reported being aware of television and radio lessons, few had yet watched or listened at the time they were surveyed. Parents reported that their children were using mainly textbooks and workbooks, as well as online resources, to continue their studies at home during the lockdown period (*ibid.*). A small percentage (less than 10%) of the 279 parents surveyed believed that their children were using educational television shows as a resource. Given that it was not the same group of parents and learners, a correlation cannot be made. It is worthy of note that 2 per cent of parents indicated that they had developed their own resources to support their children’s studies during the lockdown (*ibid.*).

According to Taylor and colleagues (2020, p. 13), 69% of caregivers surveyed in research on Theme 1 expressed a feeling that their roles had changed since lockdown: ‘Many reported that they now had more time to bond with their children, to teach them how to read and to keep them busy in other ways.’ However, 19 per cent of caregivers did not, on the basis that their roles were still shaped by communications from their children’s schools. Close to half (47%) of the learners the team interviewed confirmed actively maintaining momentum by making a point of creating regular time in their day for schoolwork.

Janda and colleagues (2020) found that workbooks from school were a key bridge between school and home. 77% of the 230 teachers surveyed indicated that learners had taken their workbooks home and were using them to continue with their studies during lockdown. Although the learners surveyed were not directly linked to the teachers surveyed, over 90 per cent of these respondents confirmed that they had indeed taken their workbooks home, meaning that almost all of the learners surveyed had access to an offline source of study material. Furthermore, like those responding to the Theme 1 team, most learners surveyed in relation to Theme 5 indicated that they had been making time to study every day—although the length of time they spent studying appeared to be less than they would have spent in school (*ibid.*). Additionally, although not causally linked to the teachers and learners responding to the Theme 5 surveys, more than half of parent respondents believed that their children had taken their workbooks home and were continuing to learn during the lockdown period.

Taylor and colleagues (2020, p. 27) found that the factors children reported as supporting their learning at home included:

... being able to work at their own pace; concentrating better at home and just being comfortable there, including, in one instance, being able to have the constant company of a beloved pet; having help and support from family members and friends; and being able to access the internet. Not being under time pressure or having time constraints was identified by half of the children (six) who reported doing schoolwork daily.

The ability to dedicate regular time to learning also made a positive difference (*ibid.*).

While both teams found that the basic elements of home-schooling were already in place in many homes during South Africa's lockdown early in 2020, lockdowns are exceptional events that place extraordinary pressures on social systems, including subsystems such as education, and they can severely impact the functionality of households and families (Janda et al. 2020; Taylor et al. 2020). Another characteristic of catastrophic events is the disruption of systems and communications. The work of these teams therefore offered some early and hence timely insight into the South African experience, identifying some of the challenges that families faced in the early months of the pandemic.

5.5 The disruption of educational arrangements

In relation to Theme 1, 'Education at home' (see 1.3.1), the parents and caregivers that Taylor and colleagues (2020) interviewed reported that there had been no handover from teachers to parents; nonetheless, the latter felt

that they had been expected to take on teaching responsibilities like those of the traditional classroom setting. The research team acknowledges that this can be attributed to the pace at which South Africa's government took the decision to implement a national lockdown in an attempt to slow human-to-human transmission (HHT) of COVID-19—and only two days before schools closed for the April holidays, leaving teachers with little time to prepare parents (*ibid.*). According to Taylor and colleagues (2020, p. 32):

While both the Ministry and national Department of Education made efforts to prepare parents for the lockdown and to assist them to support their children during the lockdown, nine (9) out of the 16 families studied were not aware of these efforts. It seems that this lack of awareness was independent of the level of education of the caregiver interviewed, the area in which they live and the type of school to which they send their children.

Furthermore, Taylor and colleagues (2020) found that only 31 per cent of families had received virtual support from their children's schools, with most of those providing support being independent and former Model C schools. Among the households interviewed, that support was found to be primarily for learners in the higher grades and largely centred on sharing resources, activities and links to online materials (*ibid.*).

Communication between teachers and learners in an extended period of disrupted schooling is apparently a critical factor. Janda and colleagues (2020) reported that over half of teachers they surveyed claimed to have been in contact with their learners during the lockdown period. Close to 60 per cent of teachers surveyed indicated that they were setting tasks for their learners during the lockdown. Half of teachers also indicated that they had shared information about the television and radio lessons with learners, and almost two-thirds of teachers were watching the television and radio lessons themselves. The disparity between teachers' responses and those of caregivers is indicative that clearer and more frequent communication among all of the actors would add value to learners' experiences during a lockdown.

5.6 Parental resources, knowledge, confidence and concerns

Taylor and colleagues (2020) argue that this communication gap and the lack of support or guidance given to or perceived by caregivers translated into uncertainty and anxiety, some caregivers feeling ill-equipped to help their children with educational activities. It is important to note that the caregivers reporting feeling this way were not only those who possessed no tertiary qualifications. Over 80 per cent of parents surveyed by Janda and colleagues (2020, p. 48) indicated that they held a post-school higher certificate or above; yet, 'despite this level of education, some parents expressed the view

that their knowledge and confidence was challenged by the requirements of their children's studies'. Caregivers, keen to help, felt frustrated when their children were studying subjects that were outside of their own knowledge or experience, and they emphasised the fact that they were not professional teachers and did not necessarily possess the skills required for teaching: 'It's hard when trying to help [the children] since we are not professional teachers ... they oppose my teaching ... they say I'm not explaining like their teacher' (quoted *ibid.*).

Janda and colleagues (2020) also found that a large proportion of parents identified their employment commitments as an obstacle to supporting children with schoolwork. Some parents who were essential workers and committed to continuing to work full-time reported the struggle of delivering learning at home in the evening, after their long day at work. Parents working from home during lockdown highlighted the stress of juggling their own work responsibilities with learning support, indicating that their own deadlines and meetings were jeopardised by these additional demands. These parents argued that it is impracticable to supervise a learning load equivalent to that of a typical school day in the home environment. They cautioned that teachers should take care not to overload learners by sending too much work for them to manage to do at home.

Both research teams found access to appropriate learning resources to be a challenge for many families (Janda et al. 2020; Taylor et al. 2020). Caregivers cited inadequate access to books at home or to libraries (which were closed during the lockdown), while for most internet access was too costly. Even among those with online access, identifying suitable online lessons proved difficult. Janda and colleagues (2020) looked at broadcast alternatives, but found that those television and radio lessons that were available and accessible in homes did not cover learning appropriate to all grades.

It is worth noting that the DBE and the South African Broadcasting Corporation (SABC) launched an educational television and radio curriculum support programme for learners impacted by school closures.¹⁰ The programme began on 9 April 2020 and broadcasts lessons to Grades 10 (ages 15–16), 11 (ages 16–17) and 12 (ages 17–18), as well as for pre-primary learners, across three SABC television channels and 13 radio stations. These were coupled with online support and COVID-19 lessons for parents and caregivers, as well as for health and social workers. However, according to Janda et al., caregivers told researchers that learners are not as engaged as they might be in the classroom and find passive listening to be boring.

Those parents with more than one child at home reported increased strain as they tried to juggle not only work and learning support, but also other home responsibilities. One parent described it thus:

It's been very difficult to juggle homeschooling three kids and still continue working from home. With all the resources that I have my work suffered. I ended up working late when they're sleeping. I'm exhausted but I have to do both, especially the Grade R [ages 4–5] and Grade 5 [ages 9–10], they are not independent enough to do the work alone, so that means I must be there to teach. And then because our helpers are also off, juggling homeschooling the kids, working from home with meetings throughout the day, housework like making the kids food, it has been the hardest experience.

(Janda et al. 2020, p. 61)

In households in which both parents were working from home, competing priorities were said to present difficulties in maintaining a learning structure and getting children to co-operate (*ibid.*). Other caregivers identified a lack of structure and routine as a challenge in itself—especially planning and structuring learning time. Caregivers noted that, at home, there are distractions such as television, online gaming and social media that are generally prohibited at school; at the same time, Taylor and colleagues (2020) observed that the parents they interviewed had found it hard to adapt to their new dual role of parent and teacher, and said that this had made setting boundaries problematic, exacerbating issues around managing behaviours and disciplining their children.

Caregivers also expressed uncertainty and anxiety regarding the future of their children's education during and especially after the lockdown period. In general, the questions of grade promotion and loss of the year's learning triggered keen anxiety among parents. Four of the 16 caregivers interviewed in relation to Theme 1 expressed concerns about those of their children in Grade 12 (aged 17–18) and the possibility that they may not be able to complete the matric year, with impact on their entire futures. Several caregivers noted that they were looking to schools and the DBE for reassurance, particularly regarding contingency plans and the recovery of the academic year.

5.7 Supporting parents and caregivers in delivering learning at home

Based on these findings, Taylor and colleagues (2020) report that caregivers require support in relation to: content and the curriculum; teaching and planning; and emotionally, in the form of reassurances and guidance from schools and the DBE. In terms of content and curriculum, parents and caregivers requested more guidance on the topics that they should be covering when seeking to deliver learning at home and on which aspects of the work they should focus. Caregivers also indicated that they would

benefit from the provision of lesson plans, teaching work plans, teaching and learning tips, learning resources and learning materials. The Theme 1 research team supplements this by advising that all of this support must be simplified such that non-teacher parents can understand and implement it (*ibid.*).

Taylor and colleagues (2020, p. 23) therefore recommend that support for parents and caregivers with teaching and planning include 'how to structure lessons, make timetables, plan the week's activities, and how to approach certain topics'; 'parents may benefit from tips on what to do and what not to do during this time [and they] would find it beneficial to either have a work plan or have guidance on how to draw one up'. Furthermore, while commending those structured remote learning programmes that appear to be taking shape in better-resourced schools, Taylor and colleagues (2020, p. 31) note that 'their general absence in most homes is likely to exacerbate the stark inequalities which already exist in the South African school system if a way cannot be found to assist schools serving poorer children to do the same'.

5.8 Delivering appropriate content for virtual learning

Both Taylor and colleagues (2020) and Janda and colleagues (2020) reported concerns among caregivers about the level of learning content available on virtual learning platforms, which primarily focuses on grades at the upper age range of schools. If this is proven, the recommendations for government are straightforward. Taylor and colleagues (2020, p. 22) also report several of the caregivers whom they interviewed urging the government to offer support specifically to lower socio-economic families, on the basis that 'while some of the independent and Model C schools may have contingency plans for virtual teaching, this reality is more difficult for schools in low socio-economic status areas'.

Among the parents surveyed by Janda and colleagues (2020), many indicated the need for support, with teaching guides, internet access, technology, flexible working hours and follow-up from educators to check on their child's progress cited specifically. Among the teachers surveyed, revision support was anticipated to be the key need among learners, followed by a need for worksheets and lesson plans, and only then audio-visual materials (*ibid.*).

In conclusion to their research of Theme 6, 'Ameliorating the impact of 'fake news' on high school learners during COVID-19' (see 1.3.6), Motsepe and colleagues (2020, p. 21) recommend that, 'in fulfilling its constitutional obligation to provide quality education, [the government] ought to invest in a curriculum that fosters and encourages the development of critical skills and literacies'. Among the skills critical to learners are information

literacy, media literacy, digital literacy and science literacy. However, the team also acknowledges that the costs of data and poor connectivity in South Africa mean that even the best-conceived programmes aiming at developing learners' critical digital skills and literacies might not take root as intended, and they urge the basic education sector to bridge the digital divide. During the time of lockdown in South Africa in early 2020, Motsepe and colleagues (2020) found that WhatsApp is the most used application in many cases, because of its simplicity and familiarity, and parents expressed their appreciation of teacher-created WhatsApp groups offering them remote support. We can consequently conclude that the education sector in South Africa might consider how to use the tool in a more structured and cost-effective way to maintain teaching and learning routines.

5.9 Widening access to devices and lowering the costs of learning online

With working and learning from home normalised during the pandemic period, it is evident that telecommunications have a central role to play. The potential of online delivery to fill the in-person gap during the lockdown period was self-evident. The DBE and HEIs sustained learning programmes by delivering remote learning online, as well as by television and radio broadcasting.

Yet the best available medium to ensure that learning continues during this crisis period is not without its limitations. In researching Theme 2, 'A comparative study on the response of non-profit organisations in education to the COVID-19 pandemic' (see 1.3.2), Rajab and colleagues (2020, p. 36) found that, even as numerous education NPOs focused on remote learning, 'the education community's response to the COVID-19 crisis highlights the large disparity in access to education between the poor and the wealthy in developing as well as developed nations'. The recurring theme of unequal access to the necessary technology emerged here, with disadvantaged learners found to be effectively excluded from digital approaches to the curriculum—a finding echoed across many themes and at levels beyond basic education. Jappie and colleagues (2020, p. 7) confirm that 'many students from lower socio-economic backgrounds do not have access to the internet due to lack of network coverage, or cannot afford access, even though universities have made data available'.

Researching Theme 1, 'Education at home' (see 1.3.1), Taylor and colleagues (2020) found that more than half of the 16 families they interviewed had no access to a regular internet connection, including those living in the suburbs. The team also reported interviewees complaining about the costs

of downloading available online teaching and learning resources, explicitly noting that this restricts their ability to access those resources and support their children. Taylor and colleagues (2020) recommend that the government make reaching an agreement with telecom companies an urgent priority to allow educational materials to be more affordable and thus more widely accessible to all families.

Indeed, making online resources more affordable is a common theme across the research reports. Rajab and colleagues (2020) note that mobile data in South Africa is expensive and that South African users pay more for data than users pay in other countries in which the same mobile operators (e.g. MTN and Vodacom) operate. They recommend that government and the private sector must jointly consider strategies to address these costs, particularly when they impact negatively on educational purposes, and share that 'NPOs recommend that mobile operators zero-rate educational sites and NPO portals, that digital learner platforms are developed with minimal data usage, and that more concerted efforts are made to develop or provide free education resources' (Rajab et al. 2020, p. 40).

5.10 Developing a structured approach to online learning

The early period of the COVID-19 pandemic posed direct health threat to learners, teachers, school support staff and other personnel across the education system in South Africa. The steps taken to mitigate the risk of HHT nonetheless posed an indirect threat to learning, risking the educational ambitions and hopes of learners and of teachers for their wards. The disruption was both major and multidimensional, and one aspect complicating the response was unequal access to online learning. The impact of the digital divide was keen in respect to access to and the affordability of online services. This is one of the reasons why it has been said that the COVID-19 crisis has thrown the marks of societal inequality on the education system into relief; a less well-noted revelation is how important it is for education authorities to get parents' buy-in on their children's learning journey.

Not only did the government's lockdown measures close schools and disperse learners, but also they disrupted households and made demands of parents. The impact of this disruption needs to be investigated in much greater depth. The sudden immersion of caregivers into teaching and learning support was evidently uncomfortable, if not traumatising—and yet it is doubtful whether that learning could have been sustained during lockdown in any other way. We might consequently hypothesise that this experience will present education authorities with a positive outcome—raising awareness

among some parents of the importance of schooling for their children—and ask what we might do to leverage this experience. In doing so, however, we must remember that this may not be a universal truth: those parents who felt wholly unprepared for this responsibility and continue to feel disempowered may not so readily participate in efforts that reach beyond the pandemic period.

The account shaped by the research efforts reported in this chapter reveals an education system and households destabilised by, and the difficulties of administering a large schooling system in the midst of, the global COVID-19 crisis. If the education sector is to emerge better prepared for disaster, it must develop a structured approach to disruption and discontinuity, as Govender and colleagues (2020) suggest in their analysis of disaster responses in four cases (see 1.3.10). That research team concludes that education systems are often ill-prepared to mitigate the effects of disasters such as pandemics, and that planning for service continuity during the emergency event itself and immediately thereafter is important. They also argue that such events should be viewed as opportunities to ‘Build Back Better’—namely, by making structural improvements to schooling and the education system more broadly (Govender et al. 2020).

In technology terms, Govender and colleagues (2020) highlight building digital literacy as critical to the use of information and communication technology (ICT) and e-learning to support the education system both in disaster events and more broadly. They suggest that it might offer one solution to other challenges including staff shortages, insufficient classrooms and more sporadic disruption, and they advocate for distance learning solutions that reach learners who are not able to access schools and universities in person (*ibid.*).

Notes

- 1 <https://www.dailymaverick.co.za/article/2020-07-30-widening-inequality-gap-in-sa-schooling-a-further-casualty-of-covid-19/>
- 2 Respondents in both the Theme 1 (Taylor et al. 2020) and Theme 5 (Janda et al. 2020) studies on which this chapter focuses were of a relatively high socio-economic status, however, and thus cannot be considered representative of the general South African population. This has implications for the conclusions drawn.
- 3 <https://www.gov.za/speeches/minister-angie-motshekga-basic-education-sector-plans-support-learners-during-covid-19>
- 4 <https://www.skillsportal.co.za/content/minister-blade-nzimandes-speech-23rd-may-about-post-school-education-and-training-sector>
- 5 Note that Taylor and colleagues (2020) interviewed a convenience sample of only 16 households.
- 6 Janda and colleagues (2020) interviewed 230 teachers, 246 learners and 279 parents, selected on the basis of convenience and snowballing.

- 7 The National Education Collaboration Trust has a wide range of resources to support remote learning which can be found on <https://nect.org.za/>
- 8 These can be found here <https://www.education.gov.za/covid19supportpackage.aspx>
- 9 See <https://learn.rumie.org/jR/>
- 10 See <https://www.gov.za/speeches/basic-education-and-sabc%2%A0launch%2%A0coronavirus-covid-19-tv-and-radio-curriculum-support>

Chapter 6

Communication and Fake News During COVID-19

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Communication and Fake News During COVID-19

Milisa Janda and Zaahedah Vally

6.1 Introduction

The COVID-19 pandemic has led to national shutdowns in many countries across the world, limited or no face-to-face interaction forcing schools, organisations and governments to adjust the way in which they communicate. This chapter aims to explore the ways in which communication has changed because of the COVID-19 pandemic. We discuss how governments are engaging citizens to ensure that they are provided with the information that allows them to stay safe and keeps them up to date on new developments. Moreover, it examines whether and how governments have modelled transparency during the crisis. The chapter also looks at how schools are engaging with learners and how families are engaging with each other. It looks at the barriers to that engagement and what can be done to mitigate these barriers, at how often engagement is occurring in these different contexts and at whether participants experience the engagement as ‘enough’. We consider the main methods used to communicate during this period and how schools, organisations and governments might use these in a more structured and effective way. We outline the innovations introduced to maintain routines, the role of social media in both raising awareness and spreading misinformation, and how ‘fake news’ impacts society and with what strategies we can combat it.

6.2 How have non-profit organisations changed the way in which they communicate?

According to Rajab and colleagues (2020)—responsible for researching Theme 2, ‘A comparative study on the response of non-profit organisations in education to the COVID-19 pandemic’ (see 1.3.2)—before the outbreak of COVID-19, many education non-profit organisations (NPOs) relied heavily on in-person activities, including office-based operations, conferences with large numbers of delegates, and delivering teaching and learning to their beneficiaries. The research team found that close to a quarter of the 89 NPOs they surveyed indicated that they had been so drastically affected by South

Africa's lockdown that they had been forced to shut down their operations (*ibid.*). Others indicated effects ranging from substantial, with nearly all activities significantly affected, through partial effect, with some activities shut down or changed, to minimal, with some minor changes. No NPOs indicated that they had been unaffected.

Most NPOs had looked for new options for delivery of their services. Rajab and colleagues (2020) found that technology is a critical part of the 'new normal' for NPOs moving forward. They found that Instagram and WhatsApp are currently vital tools with which NPO leaders communicate with staff, stakeholders and beneficiaries; internationally, leaders cited using Zoom, Slack and Microsoft Teams in addition to Instagram and WhatsApp. Rajab and colleagues (2020) note that working remotely may sometimes be difficult for those education NPOs with limited resources to ensure that their employees have connectivity. Some NPOs reported facilitating remote working by providing employees and beneficiaries with laptops, airtime and data, recognising the value of virtual community by using WhatsApp groups and other easily accessible, data-friendly platforms.

6.3 How are governments engaging with citizens?

Introducing Theme 4, 'COVID-19 lockdowns—can they help to govern the pandemic in Africa?' (see 1.3.4), Paterson and colleagues (2020, p. 5) assert that 'governments are the primary instruments according to which decisions are supposed to be made in the interests of the wider society'. Government communication has played a central role in how citizens have handled the pandemic. According to the team researching Theme 3, 'The role of culture in alleviating the spread of COVID-19' (see 1.3.3), South Africa is far from alone in putting in place restrictions on the movement of citizens not deemed essential workers in response to the COVID-19 outbreak (Vally et al. 2020). These restrictions included limits on the number of people allowed to gather for events and on travelling to school or work. Vally and colleagues (2020) argue that life as we have known it has changed—that the increased level of government communications among all of the countries they studied, in announcing changes to law and reassuring citizens that they are doing their best to manage the virus, is significant. They commend the South African government for modelling transparency by engaging citizens and not merely instituting plans autocratically (*ibid.*). If citizens are properly and regularly informed of the 'what' and 'why' of a government's decisions on restrictive measures, they are more likely to comply with those measures.

In South Africa, the government communicated with its population in several different ways (*ibid.*). The Ministerial Advisory Committee on Coronavirus Disease 2019 (MAC-COVID 19)¹, consisting of 50 experts,

was formally established with the aim of providing the Minister of Health with scientific evidence and expertise on which to base decisions. Communication modes include a website that is a dedicated online resource and news platform providing up-to-date information and statistics, as well as resources for children, mental health awareness resources, fitness tutorials and resources on safety in the workplace.² A WhatsApp support line was also established, through which any WhatsApp user can access direct and recent information, statistics, resources and guidelines regarding the virus. WhatsApp is widely used in South Africa, and hence this support line is a broadly accessible source of relevant and up-to-date information on the pandemic³. Citizens can also contact an emergency hotline before encountering healthcare providers or other individuals in the event that they suspect they may have contracted the virus. South Africa's president has broadcast several addresses to the nation, providing crisis updates and updates on the measures taken by the government in response to the virus, including a national lockdown. Cabinet ministers have also addressed the public on occasion, sharing notice of issues such as the reopening of schools and post-school institutions, as well as the operation of public transport and other services during the lockdown period.

In relation to Theme 6, 'Ameliorating the impact of 'fake news' on high school learners during COVID-19' (see 1.3.6), Motsepe and colleagues (2020) also commend the South African government for communicating effectively with citizens and helping to stem the spread of false information. They argue that the South African government has built a partnership of trust with the media by delivering informative media briefings and they state that the World Health Organization (WHO) has praised the South African government's communication strategy (Maromo 2020)⁴. The establishment of a National Coronavirus Command Council (NCCC) comprising of a group of government officials selected to deliberate and make decisions on the country's handling of the pandemic, went a long way towards keeping the public on side, communicating the government's latest developments and decisions.⁵

Conversely and much more specifically, Parker and colleagues (2020)—reporting on Theme 9, 'Education, inequality and innovation in the time of COVID-19' (see 1.3.9)—argue that communication from the Department of Basic Education (DBE) regarding the reopening of schools has been perceived as sporadic, and that this has caused confusion and anxiety amongst the public. Commentary elsewhere argues that the government's attempts at engagement have not been universally positive. Naicker (2020) claims that the government has not consulted formally with experts outside of the scientific community, such as social scientists and civil society, whose perspectives would ensure a holistic approach addressing the

multidimensional challenges that have arisen during the crisis. She suggests that ordinary citizens ought to have been involved in decision-making that directly influences them; in times of crisis such as this, however, we would note that a parliamentary democracy empowers leaders to make swift decisions on citizens' behalf—even as that may seem to muffle some voices.

In fact, Motsepe and colleagues (2020) remind us that, as 'fake news' about the virus began to spread and risked lives, the South African government issued a government gazette stating that the dissemination of disinformation about COVID-19 was now a criminal offence and they highlight the important role of journalists in health communication (Republic of South Africa, 2020). They argue that 'effective communication not only contributes to reducing risky behaviour, such as visiting healthcare facilities unnecessarily or flouting health regulations, but it also helps reduce anxiety and fear by tackling false information' (Motsepe et al. 2020, p. 9).

While Vally and colleagues (2020) and Motsepe and colleagues (2020) illustrate the important role that governments have played in ensuring that citizens are well informed regarding the pandemic, Paterson and colleagues (2020) provide an example of India, where citizens had four-hour notice of a lockdown, resulting in massive population movement out of cities as workers streamed home in crowded conditions (Bhardwaj 2020). Paterson and colleagues (2020) anticipate that such mass movements may have spread infection, and the likely consequence of the short notice underlines the importance of effective communication: earlier notice of a shutdown would allow migrant workers to travel in less-crowded conditions, with lower risks of infections (*ibid.*).

Additionally, in their work on Theme 7, 'Putting the individual at the centre—the role of digital identity during the time of COVID-19' (see 1.3.7), Dale-Jones and colleagues (2020) highlight the challenge to data privacy that increased government surveillance of citizens can pose. They recognise the essential role played by technology in supporting social contact, work and learning to continue online during lockdown, but they also acknowledge the risk of breaches of data privacy. The team also discusses testing and tracing apps, such as COVI-ID in South Africa, which collects a user's location and infection status, and stores it on their device rather than on a central database.⁶ This app thus provides the user with full control of who has access to their health data, while also providing accurate information on an individual's infection status without compromising their privacy. Dale-Jones and colleagues (2020) note that, during the course of the COVID-19 pandemic, basic freedoms have been restricted as government authorities around the world have increased their monitoring of citizens. The situation is complex: governments need this personal information to target their efforts to contain the spread of the virus—but how can citizens ensure that this information is used solely for its intended purposes?

6.4 How are schools and higher education institutions engaging with learners?

Although the national lockdown resulted in the closures of schools, this did not mean that teaching and learning would come to a standstill, but rather that schools had to find different ways of engaging learners. Researching Theme 1, ‘Education at home’ (see 1.3.1), Taylor and colleagues (2020) found that although the modalities of support and advice that schools offered were sometimes unclear, it seems that the majority of those schools serving the 16 households interviewed were using a combination of electronic platforms such as Google Classroom or D6 communication platforms to communicate with children.

Similarly, in relation to Theme 5, ‘Unlocking the “lockdown mindset” ’ (see 1.3.5), Janda and colleagues (2020)—researching levels of access and engagement among teachers, learners and parents or caregivers—found that over half of South African teachers surveyed indicated that they had been in contact with their learners during the lockdown period. While the groups were unrelated to one another, the parents surveyed echoed this finding: slightly more than half of respondents indicated that they had remained in contact with teachers during the lockdown. Additionally, nearly half of learners indicated that they had been asking their teachers for help, which indicates that there was also engagement between learners and teachers. The picture was less uniform when it came to the frequency of that engagement: almost half of the parents surveyed indicated that teachers were communicating with them *often*, while another 28 per cent indicated that had been *little* communication. A third of teachers indicated that they were following up with their learners *often* and almost 60 per cent of teachers indicated that they were setting tasks for their learners during the lockdown (*ibid.*).

Janda and colleagues (2020) also asked teachers whether or not learners were using their workbooks to learn during the lockdown period and to explain how they knew this to be the case. The responses offered were categorised as ‘Yes’, ‘I don’t know’ and ‘No’. Free text answers were thus coded. According to Janda and colleagues (2020), those teachers who answered ‘Yes’ indicated that they were based this on feedback including learners asking questions or posting comments on social media platforms such as Facebook, as well as learners actively participating in WhatsApp messaging classrooms. Some teachers were giving learners tasks to complete during the lockdown period, while others were maintaining contact with, and teaching and tracking the progress of, learners using online platforms including D6 communicators, Google Classroom and Class Dojo. Teachers who indicated they did not know whether learners were using their workbooks and textbooks to learn noted that those learners were not participating in the WhatsApp groups

the teachers had created or that they had no contact details for learners and hence were unable to reach them. Similarly, teachers who answered 'No' indicated that they knew this to be the case because learners were not completing assigned tasks or had not taken their books home, or because teacher and learners had not been in contact with one another.

In their interviews with 16 households, where nine of the children attended independent or Model C schools, while seven attended public schools, Taylor and colleagues (2020) found a marked difference in answers given by respondents from public schools and those of their independent and Model C counterparts. In only one case did a public school provide advice to families, while in only one case did a Model C or independent school *not* provide advice to families. The research team found that two of the Model-C schools and one high-fee independent school made use of Google Classroom to keep children occupied. Similarly, Janda and colleagues (2020) found that most of the cases in which there had been no continued contact with teachers (46 per cent) related to public schools. If the sample were to be representative, it would indicate that these schools were not engaging with their learners during the lockdown period and, given that the majority of learners in South Africa attend public schools, it would be a worrying finding.

Of course, this may not be the result of a lack of will on the part of the schools or the teachers—or even the learners. As Taylor and colleagues (2020) note, more than half of the households they interviewed had no access to a regular internet connection. The team concludes that if the internet is not the best way of communicating with even relatively highly educated families, it must be a poor choice for communicating with most South African homes. They also note that although all families interviewed had smartphones, which present a viable form of communicating with families, data costs remain prohibitively high (*ibid.*).

Looking at Theme 8, 'Governance and management—[a] higher education response to COVID-19' (see 1.3.8), Jappie and colleagues (2020) note that the pandemic disrupted not only basic education, but also the ways in which universities function, with many having already started to teach remotely as of April 2020. The higher education institutions (HEIs) themselves recognise that some students do not have access to the digital services necessary to support continued teaching and learning; hence the researchers affirm that 'it remains important for a comprehensive and ongoing discussion to take place among all higher education stakeholders, to ensure that all students, without exception, continue to be able to study, and that all staff are provided with the means and capacity to continue to carry out their functions' (Jappie et al. 2020, p. 6). Importantly, Jappie and colleagues (2020) highlight that the pandemic disrupted not only students' day-to-day lives as courses shifted

from face-to-face modes of teaching to remote online classes, but also students' psycho-social well-being, stripping them of the social contact and support they would ordinarily share, as well as of access to university support resources such as the library and student residences. With campuses closed, many South African students returned to living conditions not conducive to learning, often as part of large families in rural areas and townships (*ibid.*).

In the case of international students, Jappie and colleagues (2020, p. 12) argue that '[i]t is important for institutions to keep communication channels open and consistent so that students can continue their studies once the crisis has abated'. Jappie and colleagues (2020) recommend that HEIs ease international students' concerns regarding application and enrolment intricacies, as well as visa issuance and renewal problems, by providing them with relevant information on and assistance in relation to South Africa's pandemic response. Finding that these students commonly use online communication channels, the team advises that HEIs endeavour to use online newsletters, dedicated sections on university websites, online forums and discussion groups, videos, instant messaging and chat bots, blogs and podcasts to share such information (*ibid.*).

Jappie and colleagues (2020) also discuss the impact that remote work has had on university staff members. They acknowledge that remote work may be more commonplace than it once was, but note that it still can be challenging. The team found evidence in its desktop research exercise that not all staff are easily able to work from home, some finding it difficult to balance their work and manage the home and children in lockdown conditions; findings also included staff saying that communication feels somewhat fragmented and that they feel isolated in the absence of 'in office' traffic and shared lunch breaks. Another thread to emerge from the research was the fact that office technology is usually quicker and more efficient, while remote internet connections may not be as reliable and hence slow performance at work. Jappie and colleagues (2020, p. 13) recommend that 'human resource departments [should] allow staff to voice their opinions in order to establish systems and protocols that will be manageable by all staff concerned during the lockdown. Guidelines should be circulated to all heads of departments so that there is consistency with regards to leave (including sick leave), recruitment, benefits and compensation.' They propose a handful of examples, including:

- grouping staff and allocating time frames in which they can work in shifts, thereby remaining motivated and experiencing less strain;
- providing support and training for staff whose home environments are not conducive to carrying out their normal duties effectively; and
- utilising annual, sick and emergency leave fairly to ensure that staff continue to get paid (*ibid.*).

A few guiding principles can help staff to find their balance and reclaim their productivity in these uncertain times: 'This fast-moving situation requires a careful, consultative and co-ordinated response from executive management teams, and ongoing, frequent, and concise communication in response to these changing conditions will be critical' (Jappie et al. 2020, p. 14). The team stresses the important role that HEI management should play in communicating with the HEI community, and it acknowledges the daily dialogues between HEI executive teams, health officials and government departments during the lockdown period, which allowed HEIs to think proactively and make informed decisions. Jappie and colleagues (2020, p. 14) advise that 'a clear, inclusive and participatory strategy must be adopted for university management to engage staff and seek solutions together'.

Similarly looking at the impact of closures on community, Vally and colleagues (2020) argue that while ongoing communication between education providers and learners (and their parents) is important, educationists should pay attention to the impact of school closures on their position within the community, as spaces through which important information is ordinarily disseminated. Schools are not only places of teaching and learning, but also serve as community hubs—and their closure in a time of national crisis has consequence.

6.5 How are families engaging with each other?

The national lockdown meant that all citizens other than essential workers were required to remain at home, with the aim of limiting the spread of the virus. This meant that families shared space, with parents and caregivers commonly working from home, and learners trying to continue their educational activities at home. Taylor and colleagues (2020, p. 12) asked the households they surveyed about their routines before lockdown and summarise responses thus:

Under normal conditions there was a high level of involvement of caregivers and other family members, particularly fathers and siblings, in the children's education across the 16 families. A majority (81%) reported their involvement included: assisting the children with homework; preparing the children for assessments; checking school schedules; and motivating the children to learn. Resources from the school (88%) and the internet (75%) were stated as the main resources used in the children's education.

All of the households reported that their daily routines changed during the lockdown period. (Taylor and colleagues 2020, p. 14) summarise the changes thus:

A majority of caregivers (69%) stated that their roles had changed since the lockdown, and that they felt the need to provide more support to their children regarding their schoolwork (5) or emotionally (3) or both. Three caregivers felt that they had no need to play a greater educational role because the school was doing an excellent job of communicating with and providing a structured program for their pupils. Two respondents felt no need to change their roles as they were already providing a great deal of support to their children before lockdown.

Half the caregivers (8) had a positive response towards these changed roles and felt closer to their children and able to provide more support now that families were being thrown together in this way. Two caregivers felt neutral towards these changes, while the balance (6) were anxious because they felt they were not adequately equipped to support their children or felt uncertain about their children's future because of this hiatus in their schooling.

Although Janda and colleagues (2020) did not ask the parents and caregivers they surveyed about their routines pre-lockdown, they found that over 80 per indicated that they had been helping their children with schoolwork during the period. The research team also found that, of the respondents whose children were continuing with learning during the lockdown, the majority were doing so at their parents' or guardians' request.

In terms of engagement outside of the family, Taylor and colleagues (2020) found that 10 of the 19 children they interviewed were in touch with their friends. Most children were using electronic devices to socialise, WhatsApp being the most common method cited. The team also found that two children living in a township played with local friends, visiting each other's houses and playing outside daily. It is also worthy of note that, when Janda and colleagues (2020) asked the learners they surveyed to whom they turn for help when challenged by the lessons presented on the radio or television, over half of the respondents reported relying heavily on their peers for educational support.

Vally and colleagues (2020) also discuss how restrictions on movement affected family routines. Individuals were unable to visit family members outside of their own household, to host family events or to participate in religious group activities. The government limited the number of people permitted to attend funerals, for example, prohibiting common practices such as the viewing of the body and the dressing of the deceased at the mortuary. The team highlights the practices common among some African communities of visiting a bereaved family and hosting evening prayers throughout the week before the funeral, both of which were precluded under pandemic conditions, asking whether these practices will eventually resume or be changed for ever.

More positively, Vally and colleagues (2020) reflect on the ways in which citizens have tried to sustain social contact by adapting their activities to suit virtual spaces. They comment too on the new social activities that have emerged, included balcony gatherings, co-ordinated clapping for healthcare workers on the front lines of the pandemic and performers streaming online events from their homes.

6.6 Main methods of communication

Several of the research teams found WhatsApp to be the method of communication most used during the lockdown period of study in early 2020. Two-thirds (67 per cent) of the teachers Janda and colleagues (2020) surveyed who had indicated following up with their learners said that they did so by means of WhatsApp. Other methods of communication included email (10 per cent) and Google Classroom (7 per cent). Another 5 per cent indicated that they were using a combination of methods, including combinations of Facebook and WhatsApp, of Zoom, WhatsApp and email, of Class Dojo and Google Classroom, of WhatsApp and Google Classroom, and of Google Classroom, email and WhatsApp. The team found that other methods of communication used less frequently included Microsoft Forms, phone calls, text messaging, school apps, Microsoft Teams and YouTube. It is interesting to note that one teacher was following up with their learners when those learners collected food packages. Similarly, among those parents and caregivers who said that they had been in contact with their children's teachers, WhatsApp was the method most commonly cited.

All of the families that Taylor and colleagues (2020) interviewed had access to smartphones and indicated that they commonly used WhatsApp. The children interviewed said that they were using WhatsApp as the main way of staying in touch with their friends. The households sampled reported receiving support from their child's school by means of electronic platforms such as Google Classroom or D6 communicators, as well as by means of printed material handed out to children before the lockdown. Govender and colleagues (2020)—the research team focused on Theme 10, 'Lessons on how countries manage schooling both during and after disasters—a study of four cases' (see 1.3.10)—found that the United Nations Educational, Scientific and Cultural Organization (UNESCO) International Institute for Educational Planning (IIEP) had suggested that online resources be used during this period, including digital learning management systems such as Google Classroom, which helps classes to connect remotely, communicate and stay organised, and Paper Planes, an initiative matching individuals with personal tutors for 12–16-week sessions conducted through video-conferencing (UNESCO IIEP 2020).

Surveying NPOs, Rajab and colleagues (2020) found that WhatsApp and Instagram were common channels for communication with staff, stakeholders and beneficiaries. Zoom, Slack and Microsoft Teams were additionally cited by international NPO leaders. The team also highlights the variety of approaches that NPOs use to communicate with the public and/or stakeholders, particularly about COVID-19 and its impact, including informative newsletters, blogs, articles and downloadable resource documents, as well as YouTube video links, all of which resources are available directly on NPOs' websites or via specific portals. Many NPOs also made announcements to the public via social media such as Facebook and Twitter.

Focusing on high school learners, Motsepe and colleagues (2020) noted that a large amount of information is distributed on social media platforms such as Twitter, WhatsApp, TikTok and Instagram rather than directly disseminated by teachers or reputable media outlets, and they sound a note of caution at the potential of these platforms to drive panic and anxiety. Vally and colleagues (2020), meanwhile, note that governments have relied on television and radio broadcasts, as well as social media, for the dissemination of relevant and reliable information.

6.7 Barriers to engagement

Technology has played an important role in maintaining communication channels in several areas; however, Themes 1, 2, 5 and 8 all identified technology as one of the most significant barriers to engagement in education (Taylor et al. 2020; Rajab et al. 2020; Janda et al. 2020; Jappie et al. 2020).

Janda and colleagues (2020) found that a considerable number of teachers they surveyed were unsure whether their learners were continuing with their studies during the lockdown period. Several teachers cited not having parents' contact details as part of the reason why. It was unclear, however, whether these teachers had no access to such details because they had no access to school records during the lockdown period of study or because schools standardly had only incomplete records. One teacher also mentioned a lack of electricity in learners' homes and hence no exposure to media as part of the reason they were unable to contact parents. This is not uncommon in South Africa, where many areas still have no access to basic utilities such as water and electricity, and was a thread running through several of the thematic reports.

Rajab and colleagues (2020) argue that disadvantaged children are often unable to participate in digital approaches to learning because they have no access to smartphones, landlines, computers or the internet. Jappie and colleagues (2020)

also highlight the fact that university students from lower socio-economic backgrounds do not have access to the internet, either because of lack of network coverage or because it is not affordable (even though universities made data available to students during the lockdown period). While all of the learners that Taylor and colleagues (2020) interviewed had access to a smartphone, they report that four of the eight children who indicated they were not in touch with their friends during the lockdown period shared that this was because they shared the device with one or more family members.

Rajab and colleagues (2020) found while technology had enabled working and learning at home, and that those NPOs with the necessary technology were able to continue operations as usual, many NPOs reported challenges in the form of high connectivity costs, a lack of devices or a lack of electricity. The team noted too that, in some cases, employees do not have the expertise to use technology, and may need to be reskilled if they are to become responsive and adapt to the current situation. In this case, the barrier to engagement is that, in an office setting, a technical expert or colleague would be able to help during the upskilling period, ensuring that work is uninterrupted.

Rajab and colleagues (2020) also specifically highlight mobile connectivity and the challenges associated with that. They discuss how, unlike working in an office in which there is a shared connection, those working from home without fibre or an asymmetric digital subscriber line (ADSL) often must use mobile data, which relies on good reception to work well. Those employees who reside in areas with little or no network coverage consequently struggle to sustain communications, for example experiencing disconnection during meetings and lost time—a finding echoed by Jappie and colleagues (2020).

It is evident that technology is a necessary tool of communication and that the experiences of users during the pandemic period can inform efforts not only to make the best use of technology as it continues, but also to develop and solidify systems that are more effective in the post-COVID world. Parker and colleagues (2020) recommend that those innovating communications in the education sector will do well to first map the existing inequalities in the system and then aim to reduce them.

6.8 The role of social media

Social media has played a significant role in raising public awareness during the time of COVID-19. Motsepe and colleagues (2020) affirm that access to accurate information during a pandemic is critical in allaying fears and countering 'fake news'. A large amount of information is distributed on

social media platforms such as Twitter, Facebook, WhatsApp, TikTok and Instagram. That information, including misinformation, can drive panic and anxiety amongst platform users (*ibid.*).

Vally and colleagues (2020) found that, across the five countries they studied, both individuals and governments, as well as other actors, often took to some form of social media when addressing issues linked to the virus. The Iranian Society of Radiology COVID-19 Consultant Group (ISRCC), for example, created educational videos and disseminated them on social media, providing easy and fast access for all physicians (*ibid.*). The team also discussed how the COVID-19 Public Hotline delivered on WhatsApp provides critical information in South Africa.⁷ At the same time, the team found that individuals in the countries studied were increasingly using social media as an emotional outlet, venting their shock, disappointment or confusion, usually through humorous posts (*ibid.*). In South Africa in particular, citizens were found to be using social media to voice their opinions on the government's leadership, as well as the measures put in place to curb the spread of the virus (*ibid.*). Additionally, 73 per cent of learners surveyed by Motsepe and colleagues (2020) indicated that they use social media and other online platforms as their main source of news and information.

Among other questions, Janda and colleagues (2020) asked the teachers they surveyed how they found out about the radio and television broadcast lessons provided by the DBE. Social media featured most commonly in respondents' answers (26 per cent), with other channels including word of mouth and WhatsApp (14 per cent), television and radio themselves (15 per cent), mainstream media (14 per cent), the DBE, in the form of communication from circuit offices, subject advisers and department websites (6 per cent), and education non-government organisations (NGOs), such as the Zenex Foundation and CASME (4 per cent).

6.9 Misinformation and 'fake news'

The desktop research of Vally and colleagues (2020) into pandemic responses in five countries suggests that the spread of misinformation about COVID-19 was inevitable, given its nature as a novel coronavirus on which little scientific evidence was available to explain its causes, shape its prevention and inform its treatment. The team found that the main channel through which misinformation was communicated in all five countries was social media, including WhatsApp, Facebook and YouTube, as well as blogs (*ibid.*). Motsepe and colleagues (2020) too found that the spread of fake news and misinformation about the COVID-19 pandemic became increasingly prominent on social media platforms during the period of study.

6.9.1 The impact of 'fake news'

Motsepe and colleagues (2020) differentiate between two types of 'fake news': disinformation and misinformation.

- *Disinformation* is false information deliberately circulated with deceitful intent.
- *Misinformation* is inaccurate, outdated or incomplete information that is not knowingly misleading, but which nevertheless has that effect.

At a time of pandemic, co-operation among individuals is key to slowing the spread of the virus. Such co-operation is rooted in credible information supplied by trusted sources on which individuals can rely (*ibid.*).

Research on both Themes 3 and 6 found that 'fake news' is mostly widely disseminated via social media platforms such as WhatsApp, Facebook, Twitter and YouTube, as well as blogs (*ibid.*; Vally et al. 2020). According to Motsepe and colleagues (2020), 'fake news' triggers panic and fear, and it can elicit overreaction, such as the panic buying and hoarding behaviours witnessed the world over in early 2020, to underreaction, whereby individuals put themselves and others in danger of infection because they disbelieve the scientific and government narratives. Vally and colleagues (2020) found that disinformation parading potential cures for the virus has directly led to the deaths of hundreds of people: in Iran, nearly 300 people died and 1,000 fell seriously ill after industrial-strength methanol was touted on social media as a home cure to COVID-19 (Scarlett 2020).⁸ The team cites other examples of misinformation spread in Italy and the United States (*ibid.*).

To this extent, fake news has the potential to actually *reverse* progress made in the fight against the virus. Motsepe and colleagues (2020) found that the increased use of online platforms during the lockdown in South Africa fuelled the circulation of fake news; high school learners were found to be particularly susceptible targets because they could not always interpret online content. Indeed, Vally and colleagues (2020) argue that myths about the virus take root when individuals have no frame of reference within which to process a crisis event of this type and hence believe in false cures as a sort of coping mechanism.

6.9.2 Strategies to combat 'fake news'

Motsepe and colleagues (2020) recommend that the following strategies could go a long way towards alleviating the spread and impact of fake news.

- **The role of media outlets** The team argues that media houses and their partners have a responsibility to fact-check the information they disseminate and to act as reliable sources of information. They also advise that clickbait on websites can trigger unnecessary fear and an outlet should carefully monitor the content to which it is playing host (*ibid.*).
- **Circulation of reliable and timeous information** Motsepe and colleagues (2020) highlight that journalists have an especially important role to play in disseminating reliable, valid and trustworthy health communication during the COVID-19 pandemic. The team encourages journalists to work closely with the health community, as well as government and community representatives, to distribute only accurate information. This will slow the spread of misinformation and promote public awareness around the virus, helping to alleviate fears and anxieties, and—critically—to reduce risky behaviours. The government must partner effectively with the media to ensure the dissemination of information that is accurate and timely (*ibid.*).
- **Including information and digital literacy in the curriculum** Motsepe and colleagues (2020) also recommend that, in the longer term, digital and information literacy should be embedded into the basic education curriculum, with the support of the government, to equip learners with critical thinking and skills that will help them to navigate a world that is increasingly digitised.

Notes

- 1 See <http://www.health.gov.za/index.php/gf-tb-program/487-covid19-mac-ministerial-advisory-committee-advisories>
- 2 See <https://sacoronavirus.co.za/>
- 3 See <https://www.statista.com/statistics/1103151/most-popular-mobile-apps-south-africa/>
- 4 See <https://www.iol.co.za/news/politics/coronavirus-in-sa-who-boss-praises-south-africas-response-to-covid-19-pandemic-45923836>
- 5 See <https://ewn.co.za/2020/05/04/covid-19-what-exactly-is-the-national-command-council>
- 6 See <https://coviid.me/>.
- 7 See <https://sacoronavirus.co.za/contact/>.
- 8 See <https://www.dailymail.co.uk/news/article-8165403/Drinking-methanol-leaves-300-people-dead-1-000-ill-Iran.html>

Chapter 7

Future Considerations for Commonwealth Countries

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James Keevy and Amina Osman

7.1 Introduction

Any new course of action is to be informed by data and evidence. Within its limitations, the South Africa researchers bootcamp project provided focus groups oriented data; it tracked action or inaction; participatory in nature, it mobilised researchers and communities; and analysed and shared data to inform consultations, planning and possible trajectories. The question we need to ask is what does this experience mean for other countries and, specifically in this case, for Commonwealth countries? This meta-analysis of the South African bootcamp reports was prepared during the first three months of the pandemic in South Africa and may very well be dated by the time it reaches the reader; even so, it was specifically commissioned by the Commonwealth Secretariat to share the experience from South Africa, which might have implications for relevant member countries that might have experienced similar challenges. In this last chapter, we locate the emerging findings within this broader context across the five cross-cutting themes that emerged in the preceding chapters.

7.2 The Commonwealth context

The Commonwealth's 54 member countries have a combined population of 2.4 billion, of which more than 60 per cent are under 30 years old and, in some countries, over 70 per cent. These young people are expected to achieve long-term economic growth, competitiveness, prosperity and social justice if given a fair chance and opportunities. The 2016 Global Youth Development Index (YDI) produced by the Commonwealth Secretariat shows significant differences between countries that score very high and very low on youth development in all five domains of the YDI, with the gap in education being the largest. Reasons why children and young people drop out of school range from needing to work to support their families to lacking engagement in education due to the low quality and relevance of the education supplied. Drop out trends may also be correlated to gender norms: pre-adolescent boys and girls may drop out of school to support their families. Commonwealth Conferences of Education Ministers have invariably recommended that three core concerns—access,

equity and quality—should guide efforts towards all education goals, reaffirming the centrality of education to all development objectives.

The Education 2030 Framework for Action—Towards Inclusive and Equitable Quality Education and Lifelong Learning for All (UNESCO 2015), calls for inclusive quality education for all by improving learning outcomes and ensuring that teachers and educators are well trained and professionally qualified within well-resourced, efficient and effectively governed systems.

The Commonwealth Secretariat, as a key contributor in shaping Sustainable Development Goal (SDG) 4, has a moral principle and shared interest in ensuring that its member states reach the associated targets. The onset of COVID-19 pandemic has exacerbated and highlighted existing educational inequalities not only due to school and university closures, but also with educational opportunities and attainment affected by lockdown, variable home-learning facilities and changing assessment methods. The long-term impact of lost earnings on young people leaving school in a period of economic recession and gearing up for a potential economic recession, is yet to be quantified. In many low-income countries of the Commonwealth, there are signs that COVID-19 school closures will have a lasting impact on increasing inequality, especially where there were already pre-COVID-19 inequalities in access to quality education e.g. between children and young people in urban and rural localities, or those from parents with higher and lower socio-economic status (UNICEF 2020a). It is imperative to maintain equity and inclusion high on the education programme and agenda of the Commonwealth. To do so requires sustained advocacy and action, while being responsive to the needs and capacities of member states.

Much emphasis is placed on acting on opportunities and building back better, making efficient and effective use of human, physical, technological and financial resources in the response to COVID-19. The pandemic has indicated the acute gap in preparedness of education systems. To build back better, many factors and considerations come into play. It starts with the individual, the human factor that ultimately shapes collective action. For change to happen with learning as a project involving the whole society, there must be buy in from all stakeholders: the learners, educators, parents and communities. COVID-19 has stressed the importance of engagement of all parties and the role of all stakeholders including the janitors and food vendors that operate in the vicinity of schools, in maintaining the safety and security of the environment and infrastructure in light of restrictions. It has indicated the importance of communication and participation in building trust, willingness and openness to change and develop new course of action.

Achieving SDG 2030 Agenda, with only 12 years remaining, requires immediate and accelerated actions by countries along working in

collaborative partnerships with governments and stakeholders at all levels. The aim is to be more effective, cohesive and accountable. COVID-19 represents an enormous challenge for the Commonwealth countries' policy response to the economic and societal consequences of the pandemic. The South African experience offers knowledge sharing among Commonwealth countries to find relevant solutions to challenges faced by the education systems and that result from COVID-19.

7.3 'Building Back Better' across dimensions

In the first chapter, we explored five cross-cutting threads that ran through the subsequent chapters—namely: uncertainty and complexity; risk, anticipation, opportunity and personal risk; hunger, anxiety, depression, abuse and boredom; and inequality, social cleavages and resources. As we draw this compendium to a close, it is useful to revisit these themes with a more forward looking intent, in a manner that looks beyond the current COVID-19 pandemic, to a future that has been drastically altered. More broadly, we couched these cross-cutting themes under the notion of 'Learning from "Building Back Better"', and so this is a moment to interrogate these ideas and share with the reader our own reflections on this very recent journey.

Since mid-March 2020, at least in South Africa, our lives have been altered, some say in a permanent manner, others, that we will eventually slip back to the business of life as it was before. What we do know without any doubt, is that the pandemic has forced us to reflect on our own practices, our ways of working and communicating, our families and, most acutely, the fact that the poor and vulnerable amongst us, have become poorer and more vulnerable during this time.

Even as the pandemic is yet to reach its crescendo in South Africa, we realise that most of us were caught unprepared, whether we are policy-makers, researchers, relief workers and, importantly, leaders and politicians. Very few countries really managed the impact of COVID-19 well, even fewer were able to prepare and protect their education systems. South Africa will be judged by history, just as all other countries will be. The South African bootcamp and the research reports it produced was timely in its contribution to assist leaders in evidence-based decision-making. More importantly though, at least for those of us that have been closely involved in the process, was the coming together of local and international, senior and inexperienced, old and young, in a manner reminiscent of the spirit of volunteerism and activism that toppled apartheid in South Africa. The update of this 'movement' bears testimony to the synchronicity of the South African experience with global citizens, with a desire to make the world better and protect the vulnerable.

7.3.1 Uncertainty and complexity

This report has illustrated the issues affecting public education systems most specifically in South Africa, but also elsewhere. While we speak about the fourth industrial revolution and our ability to manage uncertainty and complexity, much of this was superficial and wholly inadequate when the early onset of the pandemic was felt in South Africa. We have shown in this compendium how different state and civil society actors came together and tried to leverage each other's strengths, but with only limited effect. Such engagements often ended up being information sharing sessions through which the government sought to do consultation, but with extremely limited room for reciprocity. Civil society on its own got on with what it could do in the absence of the guidance the country required. Even in some cases, taking the government to court to ensure children received food, water and sanitation (Parker et al. 2020). Care should be taken to acknowledge the uncertainty and complexity wherein the key government actors tried to navigate the process as best they could. But accountability lies at the heart of democratic government. Accountability allows us to gain redress when things go wrong. It ensures ministers and civil servants are acting in the interests of the people they serve. Accountability is a part of good governance, and it can increase the trustworthiness and legitimacy of the state in the eyes of the public. The public will hold a government accountable if it fails to meet these expectations.

The voices of teacher unions were particularly notable during this period. While the intentions of the unions, and in fact their contributions, can largely be described as well planned and coherent, the over-emphasis on conditions of service, at the expense of professional conduct, remains part of a complex and ongoing rebalancing of priorities in the country, as it is the case in many other developing countries (Keevy and Gallie 2014)¹. The role of the South African Council for Educators (SACE) is integral to this rebalancing process. Over the last few years SACE has certainly started to take its rightful place in the education system, but it remains hamstrung by the dominant unions from the days when it was the unions that played such an instrumental role in anti-apartheid activities in South Africa. This imbalance was clearly seen during the pandemic, with unions working together to challenge the government on all matters that affected the safety of teachers, while the voice of SACE was largely moot. Compare this with health professionals, where conditions of service were just as, if not more, important, but where the professional conduct, long hours and benevolent service was a much stronger voice. We may ask why our teachers and school leaders in South Africa waited so long before they acted? Were they waiting for a directive from the government? Perhaps this is fair enough, but the actions were few and far between, and leaves one concerned that

the complexity of the South African teacher professionalism debates may be deepening.

7.3.2 Risk, anticipation, opportunity and personal risk

As we note in Chapter 1, substantial global risks were readily apparent, including poverty, inequality and events related to global warming, before COVID-19. The scale of the pandemic is nothing like we have seen before and our education systems have been, and continue to be, exposed to incredible risk. Current disparities relating to internet access, internet-enabled devices and levels of digital literacy have deteriorated, but of course, there are also opportunities. We have seen the exponential growth of online learning platforms in more affluent sectors of society, while those less fortunate have used WhatsApp groups as a proxy. Public schools in South Africa fall across this spectrum organised into five quintiles ranging from being in the advantaged communities (1 and 2), to those in poorer contexts (3–5). What became evident during the pandemic was that, not unsurprisingly, lower quintile schools adapted relatively quickly, while higher quintile schools were simply unable to respond (Taylor et al. 2020). The reallocation of funds that COVID-19 brought about has undoubtedly been significant, probably enough to have eradicated pit latrines which was such a controversial issue pre-COVID-19. It is not clear at the time of the writing of this compendium if the end-beneficiaries really received what was due to them in these poorer schools, but there are positive signs that what could not be done before the pandemic due to a lack of political will, has now become possible in a short space of time. As in the words of a senior official, whereas for the past 25 years it was not possible to provide a cleaner in every school and maintain hygiene, that is apparently now a reality.

On a more individual level, it is apparent that school leaders and teachers have been directly impacted by the pandemic. With or without the support of their provinces and districts, they have had to face the parents, the communities, the hungry children and the impact on their own health and safety. Many teachers in South Africa are over forty years of age (Simkins 2015) and with that it is reported that close to 50 per cent suffer from comorbidities that make it impossible for them to teach during this time (Mthethwa 2020). The phased opening of schools for physical attendance, starting with Grades 7 and 12 on 1 June 2020, and including other grades from early July 2020, mitigated some of these risks, but there is no doubt that school leaders and teachers have been subjected to high levels of stress and personal risk during this period. Measures to support them, beyond guideline documents, have been sorely lacking and so there will be a need to carefully rebuild this teaching corps after the pandemic eases. While the

government has indicated that it will create new posts and recruit additional teachers to address overcrowding in schools, increased number of classes and teacher absence, it remains that educators need to be supported to do their jobs, but also as parents and members of communities, and their well-being taken into account.

7.3.3 Hunger, anxiety, depression, abuse and boredom

As a deeply unequal country, South Africa was always going to be facing great disparities in communities across the country. Schools and, to some extent, colleges and higher education institutions were seen by many as vanguard structures during the pandemic, even to the point that senior officials spoke of schools as protecting the local communities as a first line of defence. One could probably understand this stance in poor communities where a school may be one of the few formal structures, but, together with the rise in the burning and general vandalism of schools, the notion remains uncomfortably foreign. As sites of teaching and learning, the positioning of schools in this manner does not make sense and sets the scene for heightened anxiety and disruption.

Another statistic South Africa is not proud of, is the high levels of child and women abuse in the country. As complex as the dilemma has been to agree on the right time to open schools, so too has the irreparable damage to vulnerable children. Add to this the fact that the majority of South African children get their only cooked meal at school and that this was no longer available, with the ban on the alcohol and tobacco products, and a dangerous powder keg is formed:

Children are not the face of this pandemic. But they risk being among its biggest victims. While they have thankfully been largely spared from the direct health effects of COVID-19 at least to date—the crisis is having a profound effect on their wellbeing. All children, of all ages, and in all countries, are being affected, in particular by the socio-economic impacts and, in some cases, by mitigation measures that may inadvertently do more harm than good.

(UNICEF 2020b, p. 1)

7.3.4 Inequality, social cleavages and resources

Deepened inequality because of COVID-19 was discussed above, but it is important to consider the rebalancing of the social resource equation during a time such as this. Private schools and institutions of learning, including low-fee private schools, have been steadily growing in South Africa. The unanswered question at this point is whether the pandemic will lead to

their accelerated growth? The answer is not apparent, as private schools will be negatively affected by reduced income of parents, many of whom will be affected by the economic downturn, while the increasingly struggling public education sector will create opportunities for the private sector. Taking lessons from the international community, South Africa will likely see a resurgent growth of low- and modest-fee schools in the foreseeable future.

The extent to which innovative financing models could be harnessed during the time of COVID-19 has been limited in South Africa (De Witt et al. 2020). The new thinking in this area has not been well embedded in South Africa to date, with National Treasury only commissioning work in this area in 2019/20 to try and provide guidance to the education sector. One could imagine how an education system ready for such a private–public partnership could have been more agile and responsive, but to be fair, this has not been the case internally as far as we know and South Africa is not ready for this at such a scale at this point. Likely the country will still need at least five years to meaningfully engage with these new forms of financing and public expenditure tracking to improve education spending efficiency.

Early childhood development is the one sector that was in crisis before the pandemic and it showed (Kago Ya Bana and Ilifa Labantwana 2018). With a function shift for Grade R in process between the DSD and DBE, and both formal and informal ECD centres in place, not to mention critical issues related to the qualifications of teachers and practitioners, ECD is in a crisis. Early education and childcare play a vital role in our children's early development and future learning outcomes. The fact that our youngest children are being neglected is of great concern and simply entrenches the learning deficit that our children carry with them through primary and secondary schools, and for the lucky few, into PSET. The need for leadership and capacity in the ECD sector is a national emergency, but key actors were unco-ordinated at best and uninformed at worst. We can only hope that by bringing to the fore the issue, efforts will be made to measure the costs of childhood neglect and maltreatment in cost-benefit measures and the government will work with the education, social and health sectors to integrate children's welfare in disaster and risk mitigation.

7.3.5 Information, accountability and responsiveness

As has been noted several times from the volume of research and media articles covered in the 12 bootcamp reports, the pandemic will certainly also be known as the 'infodemic' by future generations (Motsepe et al. 2020). The question is whether this wealth of information has led to increased levels of accountability and trust? Looking at South Africa, one could probably argue that the impact has been mixed. We have certainly seen our publicly

appointed officials take centre stage, often struggling under the glare of the public attention, but also in many cases, inspiring the public with thoughtful and proactive stances. Strong leaders have become stronger and the weak have slowly retreated into the shadows. In the case of education in South Africa we have seen the same trend, with some good examples and some bad. Overall, one may surmise that public accountability in education in South Africa has been given a positive boost.

The quality of national education system data in South Africa remains unclear. The system has not inspired widespread confidence, although there have been positive examples, notably the efficiency through which the readiness of schools could be mapped and tracked. In the digital age we live in, one may have expected even more, specifically when we look beyond PPEs, to online learning content for the public system and more sophisticated platforms for the mapping of trends for forecasting. The education system has not been hugely responsive in this area, but here also, we do see incredibly positive initiatives emerging.

7.4 Looking beyond COVID-19

The South African researchers bootcamp has indeed led critical thinking into how researchers could be engaged across the Commonwealth to investigate, in real-time, key lessons learned and contextual solutions that can be adapted to improve education systems and strengthen their resilience—or more boldly, rethink the education systems. Indeed, the research explored how a government leads in times of pandemic. It found that unexpected and unintended consequences, as detailed in the compendium have emerged from the lockdown. South Africa managed these complexities as best it could and there are many useful insights to take away from the bootcamp reports. South Africa also struggled to cope with this scale and urgency of the threat as most countries did, both developed and developing.

In times of crisis, decision-makers must act quickly with the best available information and create as adaptive a system as they can. Crises also reveal cleavages and gaps and challenges that may well catalyse innovative solutions and create opportunities. We hope that the health crisis will catapult political will and collective action to tackle long standing issues in the education sector in a very different way and rework the system to tackle pervasive inequalities, not only in South Africa but across the Commonwealth.

To support the re-thinking of education systems and the purpose of learning while unpacking building back better, we propose to take the narrative at a pan-Commonwealth level and invite young and not so young researchers and stakeholders to look at how governments are positioning and supporting

public institutions and education systems across the Commonwealth, and making sense of the experience. The Commonwealth Researchers in Pursuit bootcamp that convened in June 2020, as a collective reflection, will contribute to shaping responses to the stressors and disruptions facing education systems using an evidence-based approach. Real-time facts and findings will be shared with decision-makers and stakeholders in the education field to build into their COVID-19 responses but more importantly to reimagine education and learning in a transformational process.

7.4.1 When one crisis hides another

The effect on access to education is not the only worrying consequence of the COVID-19 crisis. For many children in South Africa and beyond, attending school is not just an opportunity to learn or to be in a safe environment, but their only chance to eat a hot meal. The School Feeding Programme is used across the world to protect some of the most vulnerable children, alleviating short-term hunger, improving nutrition and cognition of children, and transferring income to families. In some poor households, it represents about 10 per cent of their monthly income. Across the Commonwealth, we have great examples of school feeding programmes offering a lifeline for poor and marginalised children and those in remote areas. In addition to government programmes, this is also an area where partnerships with NGOs, schools and local education authorities are most prevalent. These feeding programmes provide free food grains, nutritionally balanced meals and innovations such as digital school meal planners. The grave concern is that, despite these strategies, many children are missing out, particularly at a time when an increasing number of families are dealing with unemployment and income loss.

The United Nations' World Food Programme (WFP) estimates that 368 million children across the world are currently not receiving school meals, up from 300 million in mid-March. And, in the Commonwealth, more than 133 million children are thought to be missing out. Without school meals, millions of children will become susceptible to malnutrition and other health risks as their immunity diminishes. Effective school feeding programmes also provide indirect benefits to communities, such as employment opportunities in school kitchens, increased income and skill acquisition opportunities for smallholder farmers, and complementary school feeding activities such as community nutrition volunteers.

These factors should be considered given that the pandemic has had negative impacts on food security, especially for vulnerable populations including children, women, the elderly and the poor. Experience from previous health crises, such as the Ebola virus outbreak in Guinea, Liberia and Sierra Leone

in 2014 when rice and cassava prices skyrocketed by 30 and 150 per cent respectively, indicates that many countries are exposed to the risk of rising domestic food prices. Sustainable healthy diets that contain sufficient fruits and vegetables are crucial in protecting people's immunity. This is a concern for those already at risk of, or suffering from food insecurity, such as the 23 African countries severely impacted by the current locust plague. Hunger, anxiety and abuse come with food insecurity when vulnerable households are led to resort to negative coping mechanisms that include reduced number of meals, increased school drop-out rates, inability to cover health expenditures, gender-based violence, selling of productive assets and child labour.

7.4.2 Long-term effects

If the pandemic exposes the disarray of the ECD sector in South Africa, the wave of shocks will be felt broadly. One study after the earthquake of 2005 in Pakistan found large learning losses among all children (Andrabi et al. 2020). Although schools were closed for only an average of 14 weeks, the impact on children exposed to the earthquake four years later was a loss of one-and-a half to two full years of learning. Given that schools across the Commonwealth were closed or remain closed for longer than 14 weeks due to the current crisis, this has huge implications: students will be affected immediately and in the long run. Education experts hypothesise that learning losses accumulate over time when children go back to school after a gap and teachers start the next level of curriculum without assessing how much students know or taking any remedial measures.

Given that schools across the Commonwealth were closed or remain closed for longer than 14 weeks due to the current health crisis, this has huge implications: students will be affected immediately and also in the long run. Education experts posit that learning losses accrue over time when children return to school after a break and teachers engage in the next level of the curriculum without taking time to assess the learners' knowledge or take any remedial measures. Andrabi and colleagues (2020) point to the longer-term implications of the COVID-19 pandemic on children and how education systems should set priorities to mitigate these effects when schools reopen. They suggest that short-term school closures can have blatant, lifelong effects on children's learning and that temporary school closures can turn into long term learning deficiencies, especially if schools immediately return to 'business as usual' when they reopen. They show that the earthquake widened inequalities as children whose mothers were more educated, did not suffer learning deficiencies. A likely long-term effect is the exploration of new partnerships and co-operations (mentioned earlier), particularly in the area of online education—between government, civil society, private companies, telecommunications companies and others. The integration of more digital

content in teaching and learning in traditional schools, and development of digital literacy skills among youth also seem likely in the long-term.

What other alternative is there but to safeguard our children as our most valuable resource and best hope for the future, rethink the education system, the purpose of learning and engage in systemic changes as a major factor in the response to the crisis? While we try to understand what works and what does not, we should ensure that there is no trade off in human capital investment. If there is anything that the harsh lessons of the past bring to us to preserve the future, it is that we should track and monitor, as soon as possible and in the long term, the extent of deprivation of the most at risk children and adolescents and apply remedial and mitigation measures—so that it is not incumbent on the most vulnerable to pay the debt of the present.

7.5 A common bond and pursuit

The Commonwealth Researchers in Pursuit project carries forward the South African spirit of volunteerism and activism or perhaps it is the philosophical concept of Ubuntu—the common bond between us all and through this bond, through our interaction with our fellow human beings, that we discover our own human qualities. This may be a silver lining from the pandemic: our common humanity that lays bare our common vulnerability, but also our responsibility and instinct to huddle, share and build what never was, with solidarity as the foundation of our resilience, strength and response, based on the human rights and human dignity of all. If ‘I am because we all are’, there can be no social exclusion, at the very least, no exclusion from education.

The South African experience was shared in early July 2020 with the member states of the Caribbean, a region where the lives of about 7 million students and their families have been significantly disrupted by the school closures caused by COVID-19. The estimated number of 7 million affected learners does not consider the marginalised, disadvantaged, or simply invisible in the educational systems and unaccounted for. As we noted at the outset of this publication, the notion of building back better (BBB) emphasises the building of resilience in recovery, critically, through its emphasis on the root causes of vulnerabilities. In South Africa and in the broader Commonwealth context, these fault lines always include the most vulnerable, the limits of governments in their ability and often political willingness to address such matters. As we finalised this publication in August 2020, South Africa had not reached its peak infection rate. The opening and closing of schools were still hotly debated, and the consultations between government, unions and civil society organisations in the country were strained. Insights from countries ahead of South Africa in this process were starting to become

available (Lewin 2020; Kaffenberger and Pritchett 2020; ADEA 2020; Brookings Institute 2020) and locally several new research publications were being released (NPC 2020a, 2020b). Progress in the TVET sector was not evident, while ECD remained critically under attended by role players.

In his address to the Nation on 15 August 2020, President Ramaphosa acknowledged that the COVID-19 pandemic has had a “devastating economic impact, threatening the jobs and livelihoods of many South African – especially the most vulnerable. The pandemic has exacerbated South Africa’s pre-existing crises of poverty and unemployment”. He announced the Presidential Employment Stimulus that seeks to confront this impact directly, as part of government’s broader economic recovery agenda. Its aims is to use direct public investment to support employment opportunities, with the President explaining that “as we look to rebuild, the aim cannot simply be to return to how things used to be. Instead, we need to seize the opportunity to build back better in ways that transform our economy and society” (South African Government 2020).

While ‘Building Back Better’ is a laudable goal, we must take care not to diminish the damage done and to engender a perception that all will be well again once the pandemic loosens its grip. Governments have incurred huge additional debt during this period, unemployment has spiralled upwards, and learners across ECD, schooling, technical vocational education and training (TVET) and higher education will be left with considerable gaps in their education. None of these issues are intractable, but they are exceedingly difficult to address, even under normal conditions. On the positive side, we see the willingness to share and collaborate across previous divides, as well as a strong impetus to new forms of shorter and just-in-time learning using technology.

We trust that the South African bootcamp and later, similar initiatives in SADC and the broader Commonwealth still under way as we write this publication have demonstrated the importance of evidence-based research to inform decision-making during times such as these, but also on an ongoing basis. As authors we are deeply appreciative of the work of the 12 thematic leads, the many peer reviewers and the more than 120 volunteer researchers that produced the 12 reports in a space of only five weeks. This energy and willingness to make a difference when it was most needed demonstrated that, perhaps, building back better is possible. The road ahead is certainly not going to be easy, but the world will not be the same again nor will education systems remain unaffected.

Note

- 1 <https://theconversation.com/online-and-in-the-classroom-covid-19-has-put-new-demands-on-teachers-147202>

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