



Centre for Education Policy Development

THE SIZE AND SHAPE OF PRIVATE, POST-SCHOOL EDUCATION AND TRAINING PROVISION IN SOUTH AFRICA

**A study for the Department of Higher Education
and Training**

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Acronyms

AET	Adult Education and Training
CHE	Council on Higher Education
DHET	Department of Higher Education and Training
ETQA	Education and Training Quality Assurance body
FET	Further Education and Training
HE	Higher Education
HEQC	Higher Education Quality Committee
HEQF	Higher Education Qualifications Framework
NLRD	National Learners' Records Database
NQF	National Qualifications Framework
SAQA	South African Qualifications Authority
SETA	Sector Education and Training Authority
UMALUSI	Council for Quality Assurance of General and Further Education

Executive Summary

General

1. As part of the current Green Paper process, the Department of Higher Education and Training commissioned a study to establish the size and shape of private post-school education in South Africa. The purpose of the study is to inform the development of a coherent policy framework which encompasses the full spectrum of the sub-sectors that make up post-school education in South Africa.
2. The sub-sectors include all public and private institutions offering education and training to adults and post-school youth across a range of economic sectors and education and training bands.
3. The focus of this report is on private post-school education and training.
4. The study is an important first step in understanding a sector which could and should contribute to meeting the needs of a burgeoning post-school youth population in need of education.
5. However, it is only a first step, as much of the data that will assist in making sense of the private post-school sector had to be excluded from the study.

Some findings

6. A key finding of the study is the dispersed nature of data regarding the private post-school sector, which made it difficult to eliminate duplications and overlaps, and to verify information across sectors. At most, the report is able to indicate where likely overlaps exist, or where gaps seem to be.
7. As a result of the above, the datasets were treated as separate entities, with little attempts made to compare across datasets except where duplications and discrepancies were obvious. The data nevertheless give a strong indication of the scope of the private post-school sector.
8. Another key finding emerging from the study is the lack of regular annual analyses of data by the authorities who require annual reports from institutions. It was evident that most of the sampled ETQAs did not have data readily available. Even the DHET (HET) did not have the most up to date available for the study.
9. While the DHET (HET) data excluded unit-standards based qualifications, this dataset has the least possible duplications. A single dataset was used, namely the DHET (HET)'s Register of institutions and the analyses by the DHET (HET) of the 2008 and 2009 learner enrolment data.

Methodology

10. The methodology followed was largely a desktop study, using available published data, followed up by a sample of face-to-face and telephonic interviews, as well as email communication.
11. According to the brief, the report details mostly quantitative data, with limited interpretation, except where conclusions could be drawn directly from the data.
12. The response from the sampled Education and Training Quality Assurance bodies (ETQAs) was disappointing and follow-up was abandoned after several attempts. Most of the sampled ETQA's data was difficult to obtain and was variable in quality.

Limitations

13. The major limitations to the study relate to the duplication of datasets due to the requirement of institutions to report to different authorities.
14. Another limitation emerged in relation to the exclusions from the study. In terms of Higher Education for example, all the data relating to unit-standard based qualifications at NQF levels 5 – 10 have been excluded; and, in terms of HET and FET, all data in respect of credit-bearing short courses have been excluded.
15. Very little of the data have been verified. It is only the South African Qualifications Authority (SAQA) that undertakes stringent verification before any data is uploaded.
16. Collecting Adult Education and Training (AET) data was particularly problematic. There is currently no national register for private AET centres. Despite much activity in respect of Adult Basic Education and Training (ABET) in the economic (SETA) sectors, the only data readily available, albeit only partial information, emerged from Umalusi and the DHET's Management Information Support unit.
17. A further limitation is the fact that none of the data sources provided a full picture of even their own datasets. Umalusi's dataset, for example only covered a small sample of all accredited AET and FET institutions.
18. Data management in general seems to be weak. The DHET's Management Information Support unit is starting to address this problem.
19. While SAQA's data is arguably the most reliable, there are major gaps in respect of the datasets available for uploading. The DHET's FETMIS for example is completely excluded from SAQA's current data.

Private post-school institutions

20. In the private HE sector, there is a strong not-for-profit contingent.
21. Institutional types in private FET also extend to the dimensions of 'Conventional College', 'Education and Training Providers' and 'Workplace Providers', in addition to for-profit and not-for profit organizations.
22. Unlike the data from HET, FET data encompasses both 'whole qualifications' (curriculum-based) and unit-standards based qualifications.
23. The differences in data between the DHET (FET) and Umalusi datasets can be explained by recognizing that registration and accreditation are ongoing processes and that at both ends, institutions are in the pipeline for registration and accreditation.
24. Private AET data is problematic due to a number of factors: the nature of delivery; institutional features; and, the scale of delivery.
25. The current regulatory framework in respect of multi-purpose and single purpose institutions is exacerbating the duplication of data across the private post-school sector, especially at the FET level.
26. Private post-school institutions are found in all provinces, but the highest number of institutions is found in Gauteng, followed by the Western Cape and Kwazulu Natal.

27. Even when taking into account possible duplication/double counting of institutions, it is evident that the size of the private post-school sector is substantial.

Size of institutions per enrolment data

28. Only 3 – 5 private HE institutions can be considered to be large with more than 5000 annual enrolments. Between 5 and 9 institutions are medium-sized. Nevertheless, the top 10 private HE institutions contributed 50 725 enrolments in 2009.

29. For the sample of 175 private FET colleges (out of 434), the total enrolments in 2010 was 51 593.

30. The highest enrolment at private FET colleges is from African students. The demography of the student population at private FET colleges needs further investigation.

31. Enrolment figures at private FET colleges are much lower per institution than at private HE institutions, with a maximum, in 2010, of 3952.

Qualifications

32. The most popular fields of learning in terms of HE institutions are Fields 2, 3, 7, 9 and 10 (see Annexure)

33. The most popular type of qualification offered by private HE institutions are Diplomas (175), followed by Bachelor's Degrees (122) and Certificates and Higher Certificates (99).

34. The most popular type of qualification offered by private FET institutions are 'occupational' (SETA) qualifications, followed by the NATED/Report 191 and NC(V) programmes.

35. The most popular field of learning for private FET institutions offering the NATED/Report 191 qualifications is Field 3: Business, Commerce and Management Studies.

36. The most popular occupational (SETA) qualifications offered by private FET institutions are in Field 10: Physical, Mathematical, Computer and Life Sciences (especially computer), and Field 3: Business, Commerce and Management Studies.

Conclusion and recommendations

37. While the data is not reliable, with many possible duplications and/or gaps, it is clear that the private post-school system is substantial and is expanding.

38. The problems with the data need urgent attention.

39. Further studies must be undertaken in order to fully utilize the capability of the private post-school sector to contribute to the needs of out-of-school youth and adults.

1. Introduction

The Department of Higher Education and Training (DHET) was formed in May 2009 as a new department, bringing together all post-school education and training. This includes higher education, further education and training, and adult education from the former Department of Education, and skills development from the Department of Labour, including the work of the Sector Education and Training Authorities (SETAs) and the National Skills Fund (NSF). Also included under the DHET is a host of regulatory and other organisations, systems, and frameworks. The creation of the DHET offers the opportunity to build an integrated system which is conceptualised as an integral whole. Thus, the DHET has been building articulation and synergies between its different components.

A team of researchers has been put together to undertake the writing of a new Green Paper on post-school education and training for the Department of Higher Education and Training. This Green Paper will provide an overall conceptualisation of the work of the Department and the institutions for which it is responsible. It will set out principles on which the Department's work is based, as well as the priorities for each of the sub-sectors of the post-school system. It is conceptualising how the various institutions should work together, and looks to improve the ways in which the various components of the system relate to each other. Through this Green Paper, the Department is drawing together different policy development processes, filling in gaps, and signaling policy priorities, to provide a coherent policy framework for a diverse but integrated and coherent post-school system. It aims to provide a vision for future development of this system, to guide the work of the Department as a whole in the coming years.

A key element of the Green Paper is to understand the landscape of both public and private post-school education and training provision. The term post-school education is used to refer to all education for people who have left school as well as for those adults who have never been to school but require education opportunities. The post-school system is a term referring to all institutions which provide such opportunities and also the institutions such as quality councils, advisory bodies, levy-granting institutions and the Department of Higher Education and Training.

However, to date, in thinking about a post-school system, the growing private system has largely been excluded. While the private system is being regulated through accreditation and registration processes, the overall size and shape of the sector has not been established. The DHET now acknowledges that to exclude the private system will skew its plans for coordinating and building a vibrant and diverse post-school system, capable of addressing the needs of a varied and differentiated student population. Partnerships between public and private entities, and between the State and private institutions, have been very successful in developing countries, most notable examples include India and Korea. If the needs of the burgeoning post-school youth and adults are to be met in South Africa, policy makers have to seriously consider the contribution a dynamic and responsive private sector can make.

This report is a first step in assessing the size and shape of the private post-school system. It is only a first step because, due to the limited time frame for the study, it was necessary to exclude much of the possible sources of data. In addition, the fact that the data cannot be accessed in one single place, is not only a key finding of this study, it is also a complicating factor in drawing conclusions across different data sources (see section 3 – Quality of data). Thus, from the outset, a decision was made to treat datasets as separate entities, rather than parts of a whole, which will nevertheless give an indication of the scope of the sector.

Therefore, this report hopes to present a sense of the potential of the sector, which will prompt more work in the area, but more importantly, will prompt a common approach to data generation, collection and analyses in the future. Further, it hopes to present an improved understanding of the contribution the sector could make in meeting the needs of the South African post-school system.

This report will therefore detail the following per dataset:

- Total numbers of learners by band: higher education; further/vocational education; adult education and skills training
- Number of institutions by band and sector: higher education; vocational/further education; adult education and skills training
- Institutional size: Enrolments per institution and the range of institutional sizes
- Types of institutions: multi-purpose; single purpose; skills training institutions
- The number of for-profit and not-for-profit institutions
- Types of qualifications: unit-standards based; curriculum based and number of learners by category and level of qualification
- Location and economic sector of private post-school institutions

The report starts off, in section 2, with a brief discussion of the methodology, sample and limitations in respect of the study. Section 3 discusses the quality of the data and raises concerns about the manner in which data has hitherto been collected, presented and analysed. In section 4 – 6 the different datasets are presented. The datasets are also discussed in relation to the exclusions, likely duplications, gaps and such like. Section 7 lists the available South African research studies dealing with private post-school education. The report concludes in Section 8.

2. Methodology, sample and limitations

Data was collected largely through a desk-top methodology, making use of available published data such as annual reports and information available on websites. All Sector Education and Training Authorities' (SETAs) websites were accessed¹, but only a sample was approached for more in-depth work (see table below). Purposive sampling was used to select authorities as these organizations were the most likely sources of verifiable data. Face to face and/or telephonic interviews were conducted with most of the selected organisations to ensure data collected from websites represent the most correct status and to clarify understanding.

Table 1: Interview sample:

Organization	Rationale for inclusion	Contact person(s)
The South African Qualifications Authority	Verifiable learner and qualifications data from the NLRD	Ms Y Shapiro
The Higher Education Quality Committee (CHE – HEQC)	Responsibility for the recommendation of private Higher institutions to DHET for registration	Redirected to Dr S Essack at DHET (HET)
Umalusi, the Council for Quality Assurance of General and Further Education and Training	Responsibility for the recommendation of private Further Education and Training institutions to DHET for registration	Ms V Chatty
Department of Higher Education and Training (DHET)	Registration of private higher and further education and training institutions	Dr M Buthelezi Ms M Swart Dr S Essack Ms Hilda Herbst Ms pat Bulling (email)
Chemical Industries Education and Training Authority (CHIETA)	Large, stable SETA	Ms A Itzkin (telephonic)
Education, Training and Development Practices SETA (ETDPSETA)	Large, stable SETA; adult basic education and training data	Mr T Gula (email)
Financial and Accounting Services SETA (FASSET)	Large, stable SETA; association with SAICA	Ms N Faustino (email)
Manufacturing, Engineering and related services SETA (MERSETA)	Large, stable SETA; association with manufacturing and engineering	Mr C Basson (telephonic)
Mining Qualifications Authority (MQA)	Large, stable SETA; association with trades and adult education	Ms J Moodley (telephonic)
South African Nursing Council (SANC)	Required as per terms of reference	Dr Mkize (telephonic)
Wholesale and Retail Education and Training Authority (W&R SETA)	Large, stable SETA	Ms van der Merwe (could not be reached)

¹ See Table 2 for a full description of data collected per organisation

2.1 Data analysis

From the outset it was evident that while much data on private post-school education are available, it seems that the datasets were developed in isolation and it does not seem that these sets are regularly presented to a single authority for analysis, or indeed, that any analysis is undertaken on a regular basis. This does not mean that no data was submitted, but that the various authorities that requested the information do not necessarily capture and analyse the data. Where analyses were undertaken, (for example by the DHET FET registration department), it was for that particular organisation's own purposes only, not because it was required by an external body or to try and make sense of private post-school education for planning or other purposes. For this reason, in this report, data was analysed per set and no attempt was made to compare, verify or triangulate data across sources.

Further, according to the brief of the study, data was mostly simply quantified in order to assess the approximate size and shape of the private post-school sector. No interpretation, other than what is evident from the data itself, has been suggested.

2.2 Limitations

The data on private post-school education is both a goldmine and a minefield. It is evident that a substantial amount of data is available, but that very little systemic work has gone into collecting data for the sake of understanding the whole of the sector. Private institutions are required, as a matter of course, to annually submit reports to the quality assurance bodies that have accredited them and if they are offering full NQF registered qualifications, to the two sections in the DHET (HET and FET) that have registered them, but it does not seem required of any of these accreditation and registration bodies to annually capture and analyse the data. This is the most important limitation of the study, but as noted earlier, also the most important finding, namely that while institutions are most likely overwhelmed with the number of reports that they have to submit in order to retain accreditation and/or registration, it has come down to a few interested individuals at the various organizations to capture the data from reports and to analyse it. Most of the other limitations in terms of this study are therefore associated with this finding. These are listed below:

- 2.2.1 Due to the different formats of reporting to ETQAs, the DHET and SAQA, it is difficult to compare data across sectors.
- 2.2.2 Data is duplicated across the sector. For example, institutions seeking registration with DHET for FET programmes, needs to submit data to at least three different authorities: the SETA ETQA that is responsible for the quality assurance of a particular qualification; Umalusi, as the only recognized (by the DHET) ETQA that can recommend institutions for registration for FET programmes; and, the DHET itself. This leads to duplication of data, but at the same time does not lead to a common approach to data generation.
- 2.2.3 Where data has been captured from accreditation or registration reports, there rarely is any verification of such data. The DHET (FET), for example, indicated that in order to

verify data, monitoring site visits need to be undertaken, but that the FET registration section only managed to visit 20 out of a possible 325 private FET colleges.

- 2.2.4 Some data are outdated. The DHET (HET), for example, was only able to provide data for 2008 and 2009. Likewise, some annual reports on the SETA ETQA websites were of the previous financial year 2008/2009, for example CETA, FOODBEV, HPCSA, and so on.
- 2.2.5 The data for Adult Basic Education and Training (ABET) were particularly problematic due to the nature of delivery. First, there is no national register of private ABET providers, and second, in many cases delivery of ABET programmes do not go beyond ABET level 3. Consequently, the ABET 4/NQF 1 data, which can be verified through Umalusi's examination results, represent only a small proportion of the learners in the system.
- 2.2.6 While data about skills programmes were requested, data about short courses, in general, were not available. Private provision is well-known for its responsiveness in terms of customized short courses. This is an important exclusion from this study which is currently very difficult to assess.

3. Quality and extent of data

For this study a number of datasets were used. As noted above, it was not possible to find information about private post-school education in any one place. The diagram below indicates where datasets are held. Further, in all cases, the data available at a particular authority, such as Umalusi, or the DHET or SAQA, do not reflect the full scope of delivery. For example, some of Umalusi’s data reflect only information gained from ‘confirmed candidates’ and ‘recommended candidates²’, and not the institutions that are in the pipeline for accreditation. In the key below the diagram some of the challenges in respect of data are highlighted:

Band	NQF level	Authorities responsible for data					
		Qualifications			Learnerships	Credit-bearing Skills programmes	Non-credit bearing Short courses
		ELOAC ³	U/S based ⁴	Apprenticeships	U/S based	U/S based	
Higher Education and Training	10	CHE – accreditation: institutions; programmes 1	SETAs – accreditation: institutions; programmes; current enrolment data 2	Not applicable	U/S based	U/S based	Non-unit standards based. Largely unregulated.
	9	DHET – registration: institutions; programmes	SAQA – registration: qualifications; records of successful learners				
	8	SAQA – registration: qualifications; records of successful learners					
	7						
	6						
Further Education and Training	4	UMALUSI – accreditation: institutions 3	UMALUSI – accreditation: institutions 4	UMALUSI – accreditation: institutions 5	U/S based	U/S based	Excluded from this study.
	3	DHET – registration: institutions; programmes	SETAs – accreditation: institutions; programmes 4	SETAs – accreditation: institutions; programmes 5			
	2		DHET – registration: institutions; programmes	DHET – registration: institutions; programmes			
General Education and Training	1	Not applicable	UMALUSI – accreditation: institutions 8	Not applicable			

Figure 1: Data sources

² Two categories of institutions that have met all the requirements for provisional accreditation

³ Exit level outcomes and assessment criteria (curriculum-based qualifications)

⁴ Sector Education and Training Authority unit standards based qualifications

- 1 Only 2008 and 2009 data available from DHET
- 2 Data from SAQA excludes credit-bearing Skills Programmes (see also 7)
- 3 Data about FET ELOAC qualifications are not available as these had not been assigned to an ETQA
- 4 Institutions accredited by Umalusi offer mostly qualifications quality assured by other ETQAs.
- 6 Learnership data is only available in disaggregated sets at different ETQAs
- 8 Large overlap of ABET providers between Umalusi and SETA ETQAs. No DHET registration data.

In addition, as noted in 2.2 (Limitations), an official at DHET commented that ‘data are verifiable, but are seldom verified’. Further, according to the same official, the ‘level of sophistication in terms of data management and capturing at colleges, is problematic’. It is only at SAQA where stringent processes are in place for validation before data are uploaded. However, even at SAQA, only a partial picture emerges. First, no data have been uploaded from the DHET’s FETMIS. Consequently, only data from SETA ETQAs in respect of FET programmes are available. Second, data from the HEQCIS (data from the CHE) only reflect those private institutions’ data that met all the criteria for uploading (62 private higher institutions at the time of the interview). Third, datasets received by SAQA often do not identify whether institutions are public or private. An ‘unknown’ category has been created to deal with this omission, but this may mean that the information includes public institutions. Likewise, ETQAs do not necessarily ask whether an institution seeking accreditation is a for-profit, or not-for profit company. The only way in which to determine this is to check whether the institution is registered as PTY (Ltd) or a Section 21 company.

Nevertheless, much data is available which will provide sufficient direction in terms of this report. In Table 2 below, the data sources and categories of data requested are indicated:

Table 2: Data sources and categories of data requested

Name of authority ⁵	Categories of data
AGRISETA	Number of providers/institutions per province
BANKSETA	
CATHSSETA (THETA)	
CETA	
CHIETA	
ESETA	
FPM (CTFL, FIETA, MAPPP)	
FOODBEV	
HPCSA	
HWSETA	

⁵ For the full names of the ETQAs, please refer to Annexure A

Name of authority	Categories of data
INSETA	Number of providers/institutions per province
LGSETA	
MICT (ISETT)	
PAB	
PSETA	
SABPP	
SAICA	
SAPC	
SASSETA	
SERVICES SETA	
TETA	
CHIETA ETD SETA FASSET MERSETA MQA SANC ETD SETA W&RSETA	Number of PRIVATE institutions as follows: <ul style="list-style-type: none"> • Higher education • Further education • Adult education (ABET) • Skills programmes Size of, and enrolment figures per PRIVATE institution: <ul style="list-style-type: none"> • Large, medium small <ul style="list-style-type: none"> ○ Number of learners per qualification Number of for-profit and not-for profit institutions Types and number of qualifications offered by PRIVATE institutions: <ul style="list-style-type: none"> • Unit-standards based • Exit level outcomes and assessment criteria (ELOAC)/curriculum and subject based • Apprenticeships Location of PRIVATE institutions (per urban/rural; per province)
CHE/HEQC	Data received from SAQA from the HEQCIS developed with the HEQC to capture data from private HE institutions and from the DHET register
UMALUSI	Data dealing with a sample of institutions in the category 'confirmed candidates' in AET and FET <ul style="list-style-type: none"> • College-qualification provision • Qualifications, skills programmes, short courses, learnerships • Providers • 2010 Monitoring report (in press)
SAQA	Achievements and enrolments by year and level (mix of public and private) Achievements and enrolments by year and level (private and 'unknown') Learner data Providers
DHET (FET)	List of registered colleges Colleges and campuses per province Staff Student data 2010 Monitoring and evaluation report 2010 private FET survey results 2011-03 Quarterly report Analysis of NLRD data
DHET (HET)	List of registered HE institutions 2008 and 2009 enrolment figures at private HE institutions Registration certificates – private HE institutions

4. Private, post-school institutions: number and location

This section will start off with data received from the South African Qualifications Authority (SAQA) as the authority able to provide the most verifiable data. It will then be followed by data from the Department of Higher Education and Training (DHET) (Higher Education and Training and Further Education and Training sections) in respect of the number of registered institutions offering full NQF registered qualifications. The next dataset is that of Umalusi, the Council for Quality Assurance of General and Further Education. The data following Umalusi's data reflect information from other Education and Training Quality Assurance bodies (ETQAs), including Sector Education and Training Authorities' ETQAs and other statutory ETQAs such as SANC.

4.1 Number of institutions according to data from the South African Qualifications Authority (SAQA)

When examining this dataset, it is immediately evident that there are huge gaps in SAQA's records in terms of the number of institutions in the system. For example, in terms of the SAQA data only one private Adult Education and Training (AET) institution is known. As will be seen later, there are many more private AET institutions in the system. Likewise, the number of institutions accredited by Umalusi indicated in Table 3 below is very small. The Umalusi and DHET data (FET), discussed later, will indicate that there are many more than 28 private FET institutions in the system. However, given that institutions are required to seek accreditation with an education and training quality assurance body, and to register with the DHET, the figures below are not surprising – the data about the number of institutions and their locations will be held at the ETQAs and the DHET, and not necessarily at SAQA. All institutions were counted whether they offer a qualification or a part qualification. If only those offering a qualification were counted, the figure would be about 8000.

Table 3: Institutions – SAQA data

Band (best estimate)	Total	Provider Class		
		Private	Mixed: Public and Private	Unknown
ABET	1	1		
HE	380	362		18
Umalusi	39	28		11
Unknown (Legacy)	473	37	1	435
Unknown (under a Prof Body)	835	689	120	26
Unknown (under a SETA)	24871	5750	1414	17707
Vocational / FET	6083	2051	3867	165
Total	32682	8918	5402	18362

Nevertheless, the SAQA data is indicative of the scope of private provision, even taking into account possible duplications, including where institutions have multiple sites and where they do not necessarily offer full NQF registered qualifications (e.g. skills programmes and short courses). So, according to the SAQA data, there are at least 362 private HE and 2051 private ‘Vocational/FET’ institutions. In addition, the ‘Unknown’ category is likely to consist of a large number of private institutions, given that these institutions are associated with SETAs and Professional bodies (see Figure 2).

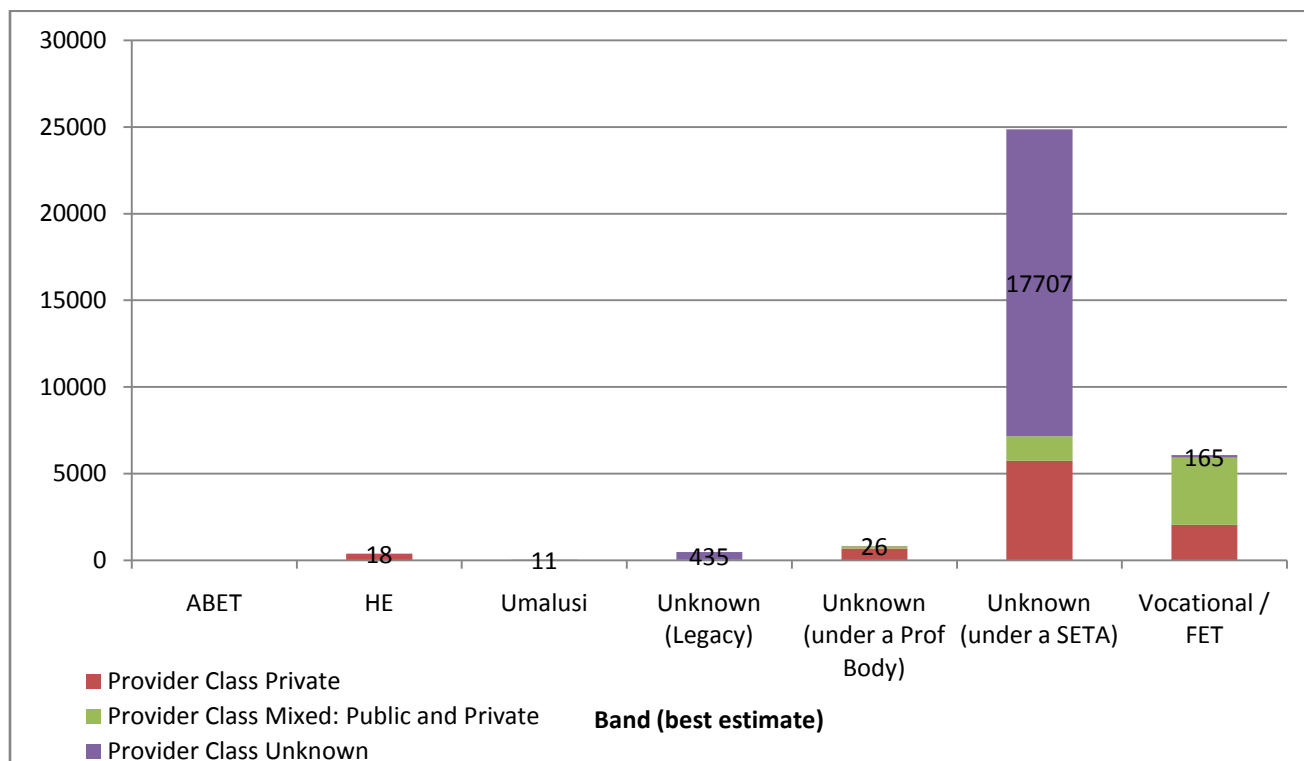


Figure 2: Institutions – SAQA data

4.2 Data in respect of number of private HE institutions registered with the DHET (HET)

The data dealing with private Higher Education (HE) institutions received from the DHET (HET) is unfortunately quite limited and outdated. As noted in section 2.2, this may be because there does not seem to be a requirement for annual reports to the department to be captured and analysed. Nevertheless, the Register of Private Higher Education Institutions is recent (update of 7 April 2011) and will be the first source used for analysis.

In the Register, the scope of this data source is indicated (2011, p. 4):

The requirement to register as a private higher education institution only applies to private institutions offering learning programmes that result in the award of *whole qualifications* (my emphasis) at Levels 5 to 8 of the NQF, that is learning programmes that result in the award of certificates, diplomas or degrees at higher education level.

This statement points to important exclusions in respect of the data from the DHET. First, ‘whole qualifications’ refer to the category of qualifications that is identified by SAQA as ELOAC qualifications, that is, qualifications detailing exit level outcomes and assessment criteria. This means that any unit-standards based qualifications at Levels 5 – 8/10⁶ are excluded from the Register. Second, this means that hundreds of institutions offering unit-standards based qualifications (refer to the SAQA data), are also excluded from this analysis. Keeping these exclusions in mind, the Register reflects the following:

There were 87 private HE institutions registered with the DHET on 7 April 2011 of which 28 institutions have been issued with intent to cancel by the Registrar as they have not fulfilled all the requirements for registration. Another 3 institutions have been deregistered (effective date December 2010), while an additional 54 and 5 institutions have respectively had their registration revoked before that date, or have withdrawn their registration.

In a list detailing student enrolments per institution for 2009, the data in respect of for-profit and not-for profit companies emerge (see Figure 3 below):

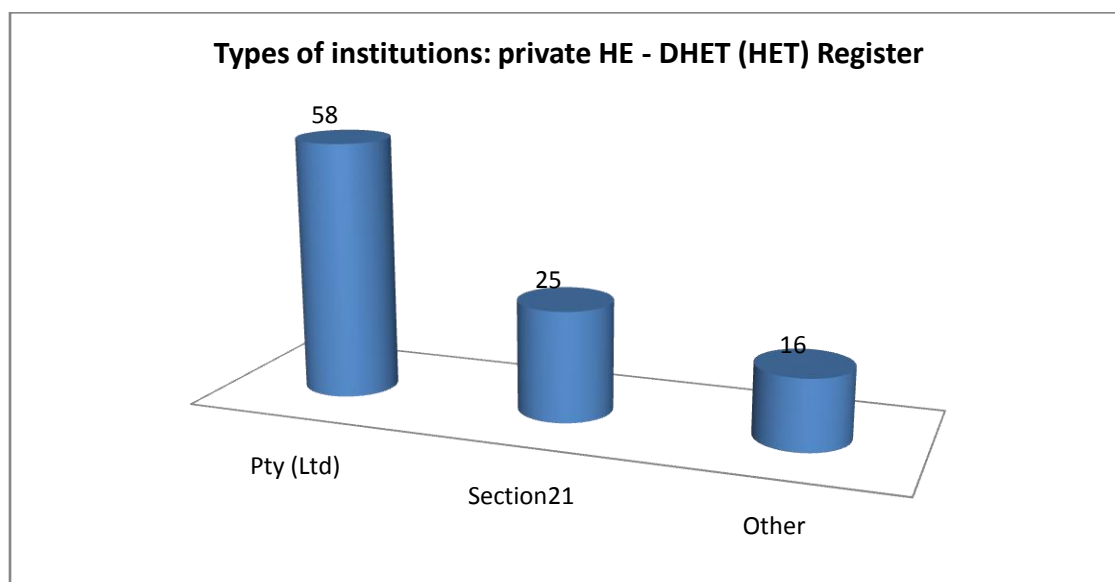


Figure 3: Types of institutions – DHET (HET) data

Firstly, note the difference in numbers of institutions. The 2009 student enrolment data reflect 99 institutions, while the 2011 Register contain 87 institutions, presumably because in the period between 2009 and 2011, a number of institutions closed down and/or were deregistered.

Nevertheless, more than half of the registered private HE institutions according to this list are for-profit organizations, while most of the not-for profit institutions are associated with a church or have a religious affiliation (17/25). The ‘other’ category in the diagram above was not identified according to

⁶ Since the promulgation of the NQF Act in 2008, the NQF consists of 10 levels, not 8. However, the Register does not yet reflect this change.

type, but could also contain Section 21 not-for-profit organizations as some of these seem to be associated with churches.

4.3 Data regarding number of private FET institutions registered with the DHET (FET)

The reports made available by the DHET (FET) unit were the most comprehensive of all the datasets in terms of the registered private FET institutions. The report used for this part of the analysis is entitled: *Monitoring and Evaluation of compliance and performance of registered private FET colleges, 31 March 2011*.

In Table 4 below, the number of registered institutions is shown (DHET, p. 2):

Table 4: Institutions – DHET (FET) data

PROCESS PLAN ACTION	NUMBER PROCESSED
Number of Annual Reporting submissions of registered colleges acknowledged & screened	238
Number of non-submissions	25 ⁷
Number of Annual Reporting submissions not processed because of cancellations (6), withdrawal of its application (1) & determinations made on applications (2)	9
TOTAL INCLUDED IN ANNUAL REPORTING FOR 2010:	272

Again, it is clear that there are discrepancies between this dataset and the SAQA dataset. The SAQA dataset obviously includes those institutions/providers that offer skills programmes and/or short courses. These will not be reflected in the DHET (FET) Register as such institutions are not required by law to seek registration.

Institutional types in FET seem to take on additional dimensions (i.e. more than only the typology of for-profit, not-for profit companies). It is not clear from the DHET (FET) report what the criteria for the classification as a particular 'type' of institution was but institutions classified themselves into three broad categories: Conventional college; Education and Training Provider; and Workplace Provider. These classifications may be associated with the type of qualification offered, or with a mode/site of delivery, or could be either a 'multi-purpose' or 'single purpose' institution. 'Multi-purpose' institutions would be offering a range of qualifications across different fields of learning, while 'single purpose' institutions would generally focus on one field of learning associated with a particular economic (SETA) sector. However, the DHET (FET) data do not give any details in this regard. In future studies these typologies may need deeper interrogation. Nevertheless, the spread of type of institution is as follows (Figure 4, overleaf) (DHET, 2011, p. 3):

⁷ This number includes 2 colleges which were excluded from Annual Reporting as a result of a recent registration.

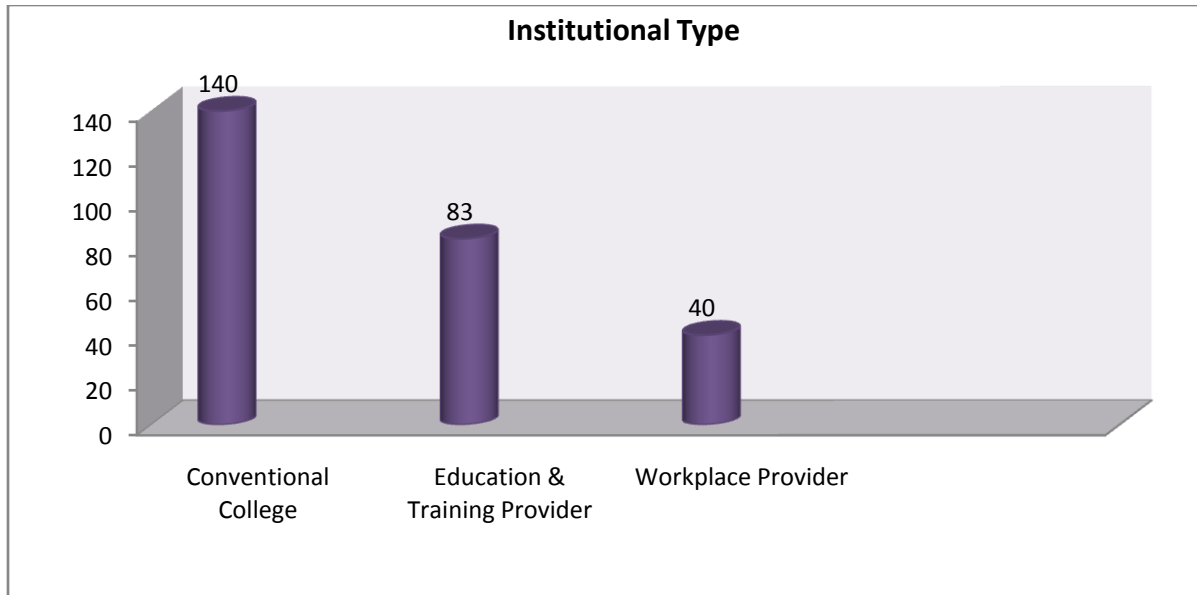


Figure 4: Types of institutions – DHET (FET monitoring report)

The Register for FET colleges, (updated 23 June 2011), lists 434 registered colleges. Of these, the bulk of the colleges are for-profit companies, while only 10 have been identified as Section 21, not-for profit organizations. However, a further 50 were left unclassified, a number of which are nursing, training, community, skills or educare centres and may also include not-for-profit organizations (see Figure 5 below):

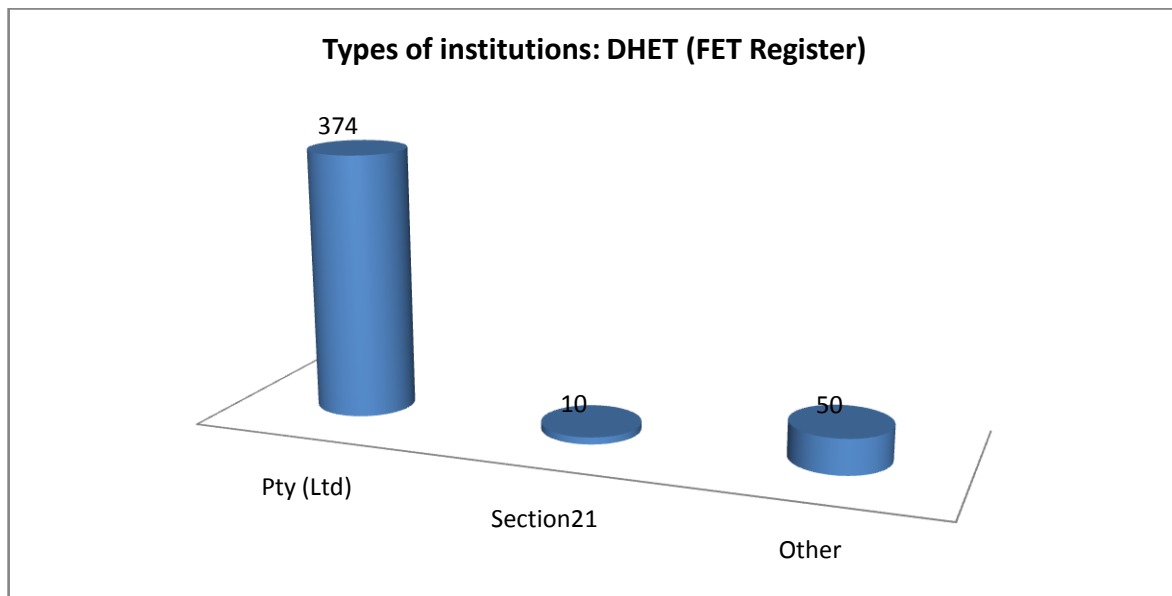


Figure 5: Types of institutions – DHET (FET register)

The DHET Management Information Support has recently introduced an annual survey of public and private institutions, including Adult Education and Training (AET) and Further Education and Training

(FET) institutions. The survey data informed the first part of this section and was presented in the DHET (FET)'s monitoring report (see above). In addition, apart from the Umalusi data, the Management Information Support section in the department was the only source for reliable data about private AET. Nevertheless, officials indicated that here too, the data had not yet been verified. The following Table is therefore, as with all the other datasets, only an indication of the scope of AET delivery by private centres:

Table 5: Survey results – DHET Management Information Support data

Province	No of centres	Learners per level							Total
		ABET lev1	ABET lev2	ABET lev3	ABET lev4/NQF1	Gr 10 NQF2	Gr11 NQF3	Gr12 NQF4	
EC	5	70	59	88	316				538
FS	1		11	6	72				90
GP	5	202	178	228	762			2059	3434
KZN	9	87	88	91	187				462
MP	5	17	34	26	87	8	15	232	424
NC	1		7	6					14
WC	22	696	628	762	865	53	24	209	3259
LP	3	142	149	285	398				977
Total	51	1214	1154	1492	2687	61	39	2500	9198

NW has not yet sent in any data at the time of the request to provide data.

When this data is compared to the SAQA data and to the Umalusi data (see below), then it is clear that there are gaps. Also, since there is currently no requirement for private AET centres to seek national registration as in the case of private HE and FET institutions, it is not clear to which AET centres the survey was sent. It is likely that there are many more AET institutions accredited by SETA ETQAs.

4.4 Data about number of private AET and FET institutions accredited by Umalusi

The next dataset was provided by Umalusi. This includes the most recent statistics (June 2011) according to different cohorts of institutions, namely 'confirmed candidates', 'recommended candidates' and 'pending'. In the Umalusi accreditation process, the first cohort includes those institutions that have been site visited. The site visit confirms the institutional data provided through desktop evaluation. These institutions have been recommended for registration with the DHET (FET). The second cohort's, i.e. the 'recommended candidates', institutional reports have been evaluated, but have not yet been confirmed through a site visit. The final cohort, namely the 'pending' group, has not yet met all the criteria for accreditation.

When the number of institutions across all the Umalusi cohorts is compared with the DHET (FET) data, it is again evident that there are discrepancies. However, given that both the accreditation and the registration processes are a dynamic and ongoing process, it is perhaps not surprising. Table 6 details the latest statistics from Umalusi:

Table 6: FET and AET Institutions per province – Umalusi

Province	FET		AET	
	Confirmed	Recommended	Confirmed	Recommended
GP	150	48	20	7
EC	27	4	2	0
FS	14	1	2	1
KZN	92	9	3	3
LP	21	7	3	2
MP	20	2	0	2
NW	22	5	1	1
NC	5	0	0	0
WC	25	2	1	0
Total	376	78	32	16

Apart from the difference in number of the FET institutions, in this table the number of Adult Education and Training (AET) institutions accredited by Umalusi also indicate a discrepancy with the SAQA data. Later in the report, data from SETA ETQAs in respect of AET institutions will show even more discrepancies with both the SAQA and Umalusi data.

In addition to the 'confirmed' and 'recommended' cohorts shown above, there are another 120 FET institutions and 84 AET centres classified as 'pending'.

In terms of AET provision, the data is particularly problematic. First, as noted earlier, there is no requirement for national registration of centres. Second, particularly in the SETA environment, much of the provision only extends to ABET level 3. Third, in most cases, only the 'fundamental' unit standards are offered (Language and Numeracy). In the past Umalusi required that centres offer the full qualification in order to be eligible for accreditation, so a large number of centres offering only unit standards are automatically excluded from the data.

Further, in a study undertaken by Umalusi in 2008, the institutional features of AET centres became evident. These features complicate data collection about AET provision (Umalusi, 2008, p9, 10):

Private AET providers are those that operate independently of the state or specific industry structures, even though they may obtain client contracts from either of these institutions. Providers make use of different forms of formal, legal registration including the following: Company for profit, Company not for profit, Trust, Close corporation... Centres are also funded from a variety of sources including client contracts (most often), tenders, donor funds and learner fees (least often).

AET providers vary greatly in their scale of delivery. However these differences are not easy to calculate, even when focusing on an obvious indicator like learner enrolment. For example, the number of learners per annum means one thing when applied to a full time course that takes place over a period such as a year, another if the numbers refer to part time students taking the same course over a longer period of time, and something completely different if applied to a two or three day course (run several times a year).

Nevertheless, with the caveat about private AET centres in mind, the reach of private FET and AET institutions across provinces is as follows:

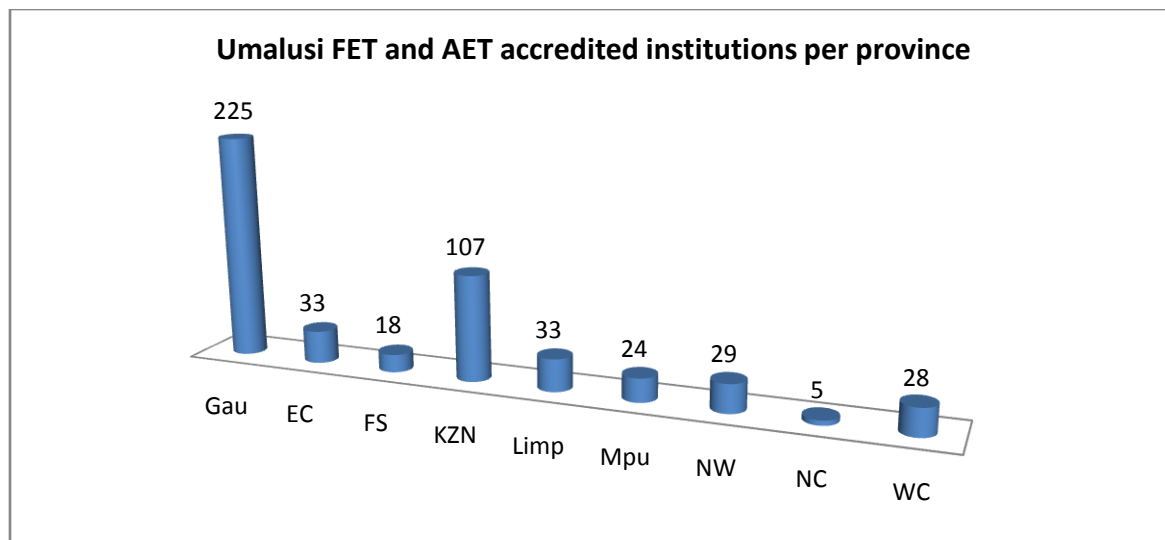


Figure 6: FET and AET accredited institutions per province – Umalusi data

Most of the private FET and AET institutions accredited by Umalusi are found in Gauteng, followed by Kwazulu-Natal.

Importantly, according to the ETQA Regulations of the SAQA Act (Act 58 of 1995), the FET institutions seeking accreditation with Umalusi would be considered ‘multi-purpose institutions’. However, as a result of the requirement that all institutions offering FET programmes must be registered with the DHET, and since the FET Act (Act 16 Of 2006) recognizes only Umalusi as the quality assurer, ‘single purpose’ institutions also need to seek accreditation with Umalusi. This situation exacerbates the duplication of data across the system – single purpose institutions offering qualifications in a particular field of learning associated with an economic (SETA) sector will be counted by the SETAs as well as Umalusi. Likewise, nursing colleges also need to seek this dual accreditation.

Also, where a multi-purpose institution offers qualifications quality assured by different ETQAs, this institution will be counted as a unique institution by each ETQA. The duplication of processes makes a mockery of the so-called ‘one provider, one ETQA’ principle so strongly mooted with the implementation of quality assurance processes in the South African post-school system. This is perhaps yet another study that may emanate from this report.

Nevertheless, the Umalsui data also details SETA providers that have sought Umalusi accreditation with the purpose of obtaining registration with the DHET (FET). (See Table 7 overleaf):

Table 7: SETA providers – Umalusi data

SETA	Applications received
AgriSETA	30
BANK SETA	3
CETA	30
CHIETA	26
CTFL	46
ESETA	16
ETDP	323
FASSET	26
FoodBev	6
HWSETA	39
INSETA	17
ISETT	110
LG SETA	11
MAPPP	21
MQA	4
POSLEC	1
PSETA	5
SANC	40
SASSETA	1
Services	221
TETA (transport)	9
THETA (tourism)	28
Total	1013

Of the 1013 applications to Umalusi, 667 have been processed and referred to the DHET (FET) for registration as an FET 'college'. In the DHET (FET) analysis, the categories of 'Conventional College', 'Education and Training Provider' and 'Workplace Provider' were used. In terms of this dataset, the multi-purpose FET institutions in Table 6 would refer to the 'Conventional College' category, while the latter two categories would broadly be within the institutions reflected in Table 7.

4.5 SAQA data compared with ETQA data (other than Umalusi) – number of institutions

Starting again with the SAQA data, the number of institutions known to SAQA is compared with data from the different Education and Training Quality Assurance bodies (ETQAs). The information from the ETQAs was first retrieved from the different websites, and then followed up by email requests for more detail (for example in respect of the provincial spread).

SAQA’s dataset includes the three categories indicated earlier in this report, namely ‘mixed public/private’, ‘private’ and ‘unknown’. For the sake of the comparison following here, the ‘mixed’ and ‘unknown’ categories are excluded except where no ‘private’ category exists. The assumption is that the ‘unknown’ category would include private institutions.

The figure on the left hand side is the number of institutions per ETQA according to their website records. The figure on the right is what has been captured in the SAQA records:

Table 8: SAQA data – number of institutions, compared with ETQA data

No	ETQA name	ETQA data	SAQA data	Comments
1	AgriSETA	292	31	
2	BankSETA	38	17	
3	CETA	238	79	
4	CHE	87	148	87institutions according to the DHET (HET) Register
5	CHIETA	121	37	
6	CTFL	-		
7	ETDP	983	443	All providers categorized as ‘unknown’ on SAQA database
8	E(W)SETA	182	76	
9	FASSET	50	223	
10	FIETA	-	33	Part of newly established FPMSETA
11	FOODBEV	101	29	All providers categorized as ‘unknown’ on SAQA database
12	HWSETA	376	94	
13	INSETA	138	1	Only 1 institutions categorized as ‘unknown’
14	ISETT	-	214	Part of newly established MICT SETA
15	LGSETA	462	201	
16	MAPPP	-	154	Part of newly established FPMSETA
17	MERSETA	3412	266	
18	MQA	58	100	
19	PAB	36	31	
20	PSETA	43	2	
21	SAICA	797	0	
22	SANC	366	1	
24	SASSETA	868	338	All providers categorized as ‘unknown’ on SAQA database
25	SERVICE	1226	279	
26	TETA	-	2	Search engine disabled on website
27	UMALUSI	1719	1	Umalusi data incorporates both AET and FET institutions
28	W&R SETA	220	16	

Some ETQA data are not available from SAQA, including information about the Health Professions Council of South Africa (HPCSA), South African Board of Personnel Practitioners (SABPP) and the South African Pharmacy Council (SACP). Also note the unavailability of data for newly established ETQAs.

Even so, the extent of the mismatch between data from SAQA and from the ETQAs is clearly evident. According to this dataset from SAQA there are 1881 private institutions in the system. On the other hand, even without all the ETQA data (see Table 8) and the exclusions in terms of the different categories used by SAQA, it seems that there are many more private institutions than the SAQA figure.

Or is there? Without being able to identify which of the institutions are single purpose institutions and which are multi-purpose, it is difficult to determine the extent of duplication of data.

Nevertheless, if one assumes that most of the institutions accredited by SETA ETQAs and SANC, for example, are single purpose institutions, then the difference in the total number of private institutions emerging from the datasets is still substantial. This may be explained by the fact that many of these institutions offer only skills programmes and short courses, but if this is the case, then the size and shape of the private post-school system is much more than only that which is reflected by registration data from DHET (HET and FET).

In Figure 7 and 8, using different datasets, a tentative, (and at this stage, unverifiable), analysis is presented. Figure 7 reflects Umalusi's data in respect of private single purpose (SETA) and multi-purpose FET institutions that have sought accreditation to become eligible for registration with DHET (FET):

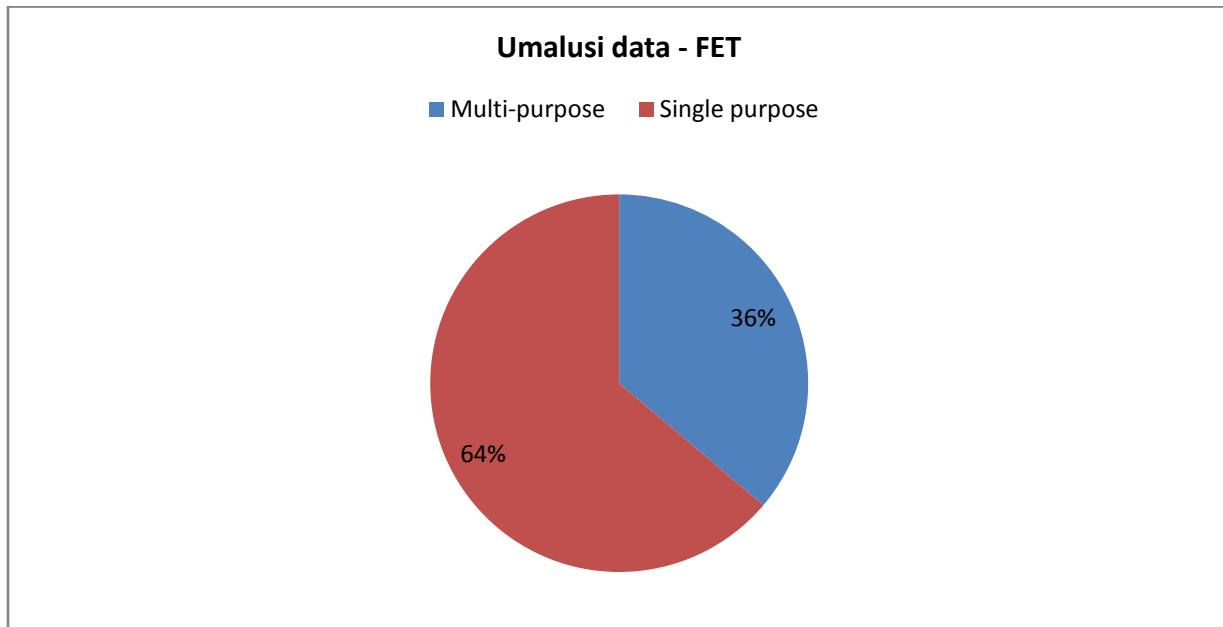


Figure 7: The ratio of single purpose and multi-purpose institutions according to Umalusi

For the sake of this argument, Figure 8 reflects the data provided by the different ETQAs (note the exclusions in Table 8 where data is not available). Here, it is assumed that institutions seeking accreditation with the CHE and Umalusi are multi-purpose institutions, while the remainder of the

institutions, associated with a SETA ETQA or another ETQA such as SANC, would be single purpose institutions, including those institutions that do not need to be registered because they are offering part qualifications (skills programmes and short courses).

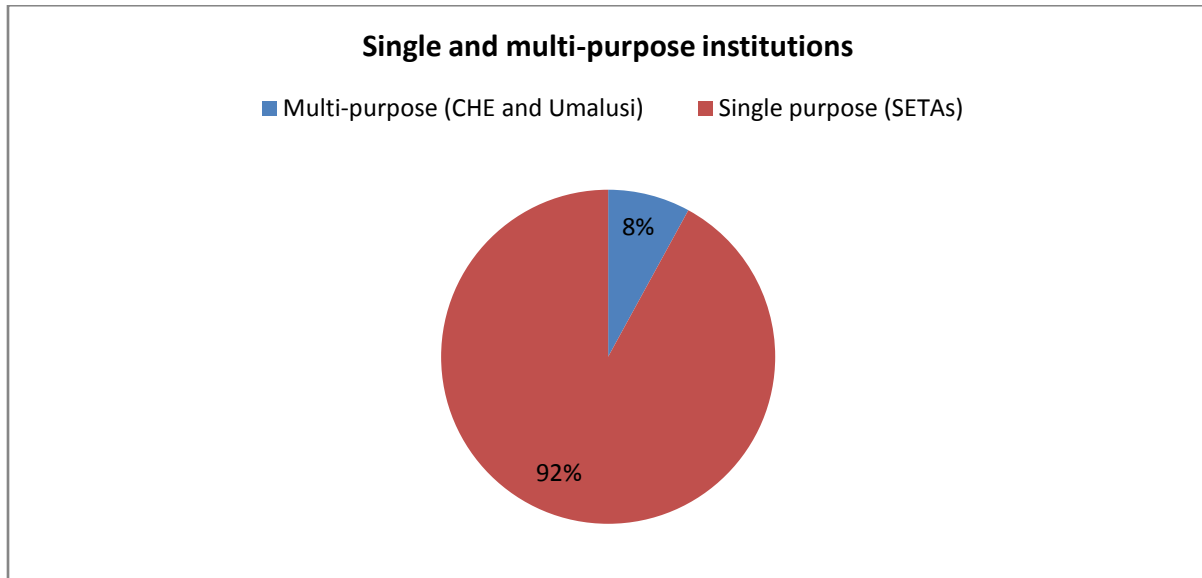


Figure 8: The ratio of single and multi-purpose institutions: Umalusi, CHE and other ETQAs

4.6 Provincial spread – all ETQAs

Table 9 details the provincial spread of private post-school institutions across a range of ETQAs. Umalusi’s data have been excluded as it was dealt with earlier. It may also be possible that the Umalusi data duplicate much of what is represented here. The data below has been retrieved from ETQAs websites. With the sampled ETQAs, it was clear though that there are discrepancies between the website data and data received directly from the ETQA. However, the table below uses only the website data with the strong caveat that the data is likely to be outdated and duplicated in many different ways.

Table 9: Provincial spread of private institutions – all ETQAs

PROVINCE	GP	LP	MP	KZN	FS	NC	NW	EC	WC	Other	Total
AgriSETA	82	38	21	22	22	6	32	30	28	0	281
BANKSETA	28	0	0	2	0	0	1	0	7	0	38
CATHSETA ⁸	68	4	9	18	4	0	5	5	18	0	131
CETA	17	8	9	23	3	0	1	4	0	611 ⁹	676
CHE	44	1	1	16	0	0	2	3	20	0	87
CHIETA	27	0	8	29	6	0	2	5	12	32	121
EWSETA	76	7	25	24	9	0	0	11	30	0	182
ETDP	493	70	48	145	42	9	27	68	85	0	987
FASSET	39	1	2	3	0	0	0	2	3	0	50
FPM SETA ¹⁰	478	24	40	176	13	8	24	39	224	0	1026

⁸ Newly established/combined ETQA

⁹ Most institutions were categorized as ‘National’

¹⁰ Newly established/combined ETQA

Table 9: Provincial spread of private institutions – all ETQAs (continued)

PROVINCE	GP	LP	MP	KZN	FS	NC	NW	EC	WC	Other	Total
FOODBEV	35	2	1	14	9	0	3	7	29	1	101
HPCSA	19	3	6	10	4	3	4	4	4	0	57
HWSETA	131	66	18	68	11	8	15	18	28	13	376
INSETA	88	0	0	16	0	0	0	1	33	0	138
LGSETA	170	57	37	64	33	7	22	54	18	0	462
MERSETA	1403	233	0	538	197	0	0	382	659	0	3412
MICT SETA ¹¹	365	96	43	61	19	3	24	44	35	0	690
MQA	31	8	19	3	5	6	27	0	1	0	100
PAB	16	0	1	8	1	0	1	2	7	0	36
PSETA	30	1	3	1	1	1	1	3	2	0	43
SABPP	21	0	1	0	1	0	2	1	5	0	31
SAICA	382	18	27	102	42	11	21	41	153	0	797
SANC	90	38	20	82	37	4	19	36	40	0	366
SAPC	13	1	0	2	0	0	2	3	4	0	25
SASSETA	321	82	47	121	46	35	46	62	108	0	868
SERVICES	736	0	29	166	24	13	15	57	186	0	1226
TETA	The TETA search engine has been disabled and calls for direct assistance went unheeded. Data excluded.										
UMALUSI	Umalusi data was dealt with earlier in the report. Single purpose institutions would constitute duplications.										
W&RSETA	97	11	11	36	6	1	3	7	48	0	220
TOTALS	5309	768	422	1759	535	114	298	886	1788	657	12534

In Figure 9 it is clear that it is in the large urban areas where the greatest number of private post-school institutions is found. Gauteng has the highest number, followed by the Western Cape and Kwazulu Natal. As expected, in the more sparsely populated provinces, a smaller number of private institutions will be found. It is nevertheless encouraging to see that such institutions are found in provinces like the Northern Cape and Mpumalanga, particularly as there are limited public HE opportunities available:

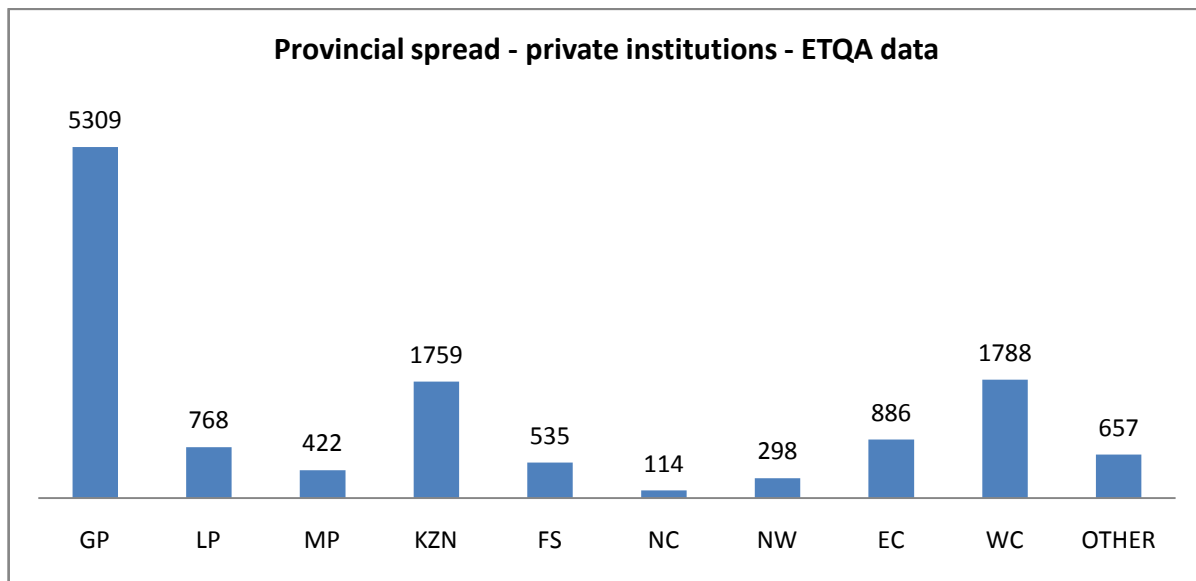


Figure 9: Provincial spread – private post-school institutions

¹¹ Newly established/combined ETQA

If the data is reduced to only those private HE institutions accredited by the CHE, then the spread is as follows:

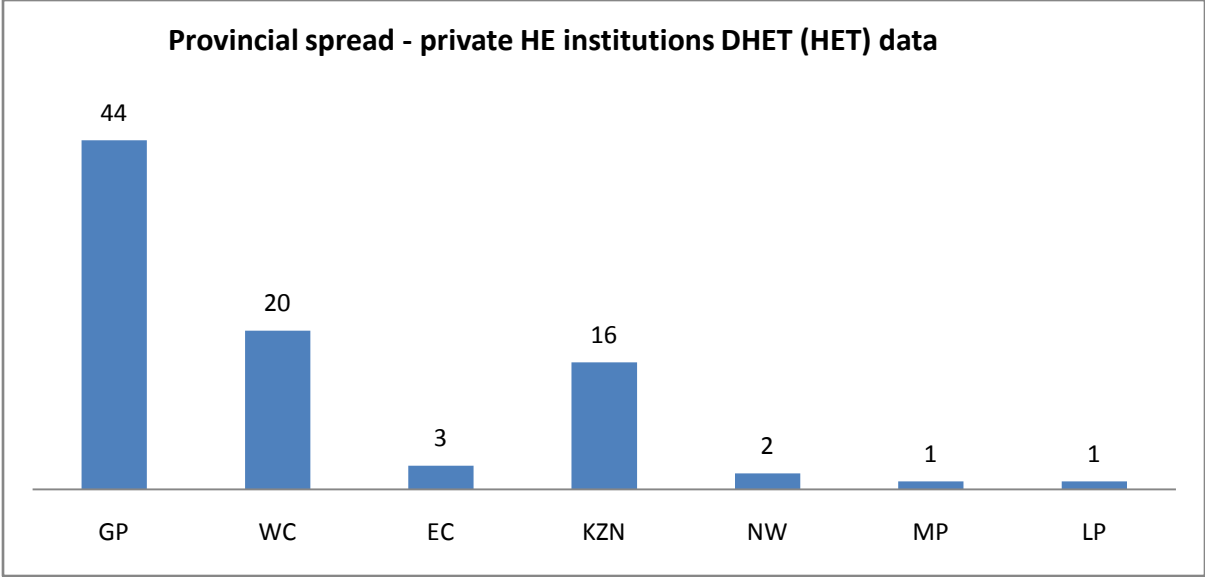


Figure 10: Provincial spread – CHE accredited institutions, DHET (HET) Register

5. Learners by level and sector

This part of the report will again start with the data provided by SAQA. The data uses the same three categories, namely 'mixed public/private', 'private' and 'unknown'. The data include information about learner achievements and enrolments. Table 10 and Figure 11 both detail the full scope across all three categories. This will be followed by the 'private' only category. Thereafter the data from the DHET (HET and FET), and the sample of ETQAs as indicated in Section 2, will be discussed.

5.1 Learners by level and sector – SAQA data

Table 10: Learner achievements to date – SAQA data

Provider Class	Total	NQF Level (Old)			
		Level 1-4	Level 5	Level 6 upwards	Unknown
Private	537362	293586	205767	33027	4982
Mixed: Public and Private	80207	59016	2723	18395	73
Unknown	197286	161175	31381	2797	1933
Total	814855	513777	239871	54219	6988

SAQA indicated that this table reflects unique learners per institutional class. If the overall total of learners who have achieved qualifications were to be counted, it would be less than the total shown here, as some learners naturally appear in more than one combination.

The greatest number of achievements, in terms of all categories, is between NQF levels 1 – 4, followed by achievements at level 5. From level 6 upwards, there is a steep decline in achievements. Nevertheless, note the important contribution at both levels 1-4 and 5 made by private provision:

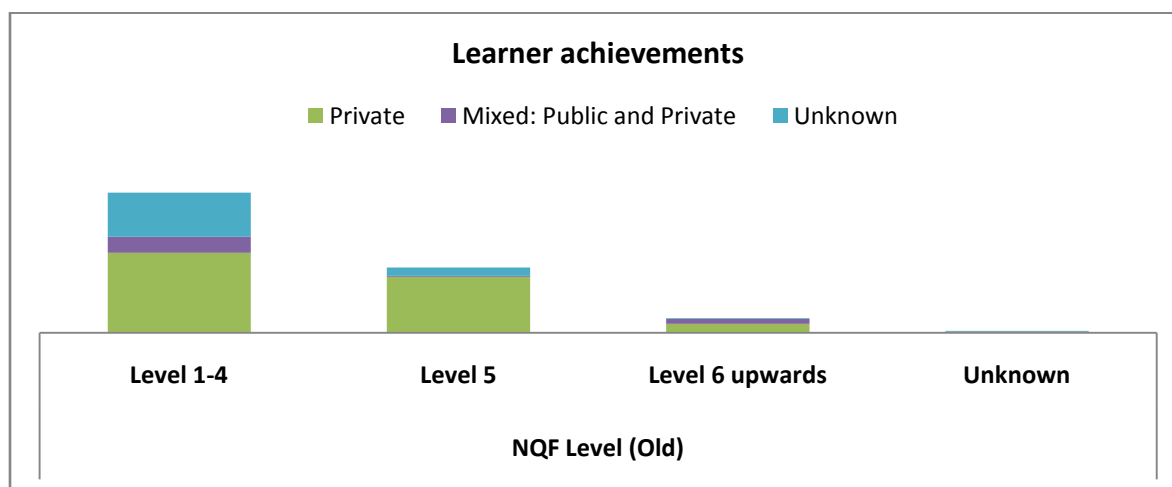


Figure 11: Learner achievements per institutional class – SAQA data

As noted above, the above table and graph reflect the full spectrum of data currently available at SAQA. If the scope of the data is reduced to achievements between 2001 and 2010, and only the 'private' category is used, then it becomes evident that private post-school education is expanding and increasingly contributing to qualified individuals in this sector (see Figure 12):

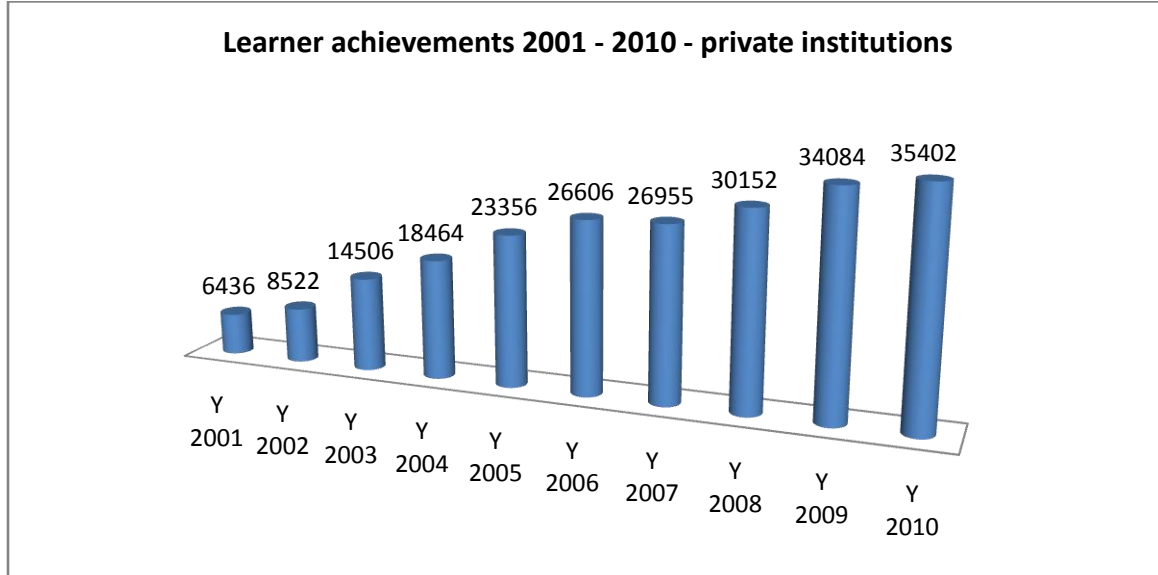


Figure 12: Learner achievements – SAQA data

If the above data is disaggregated to achievements per level, then it is clear that private post-school education is making the greatest contribution at NQF levels 4 and 5 (see Figure 13). This is the sector which is increasingly emerging as a post-school sector which provides for learners who need post-school opportunities that are not necessarily university education:

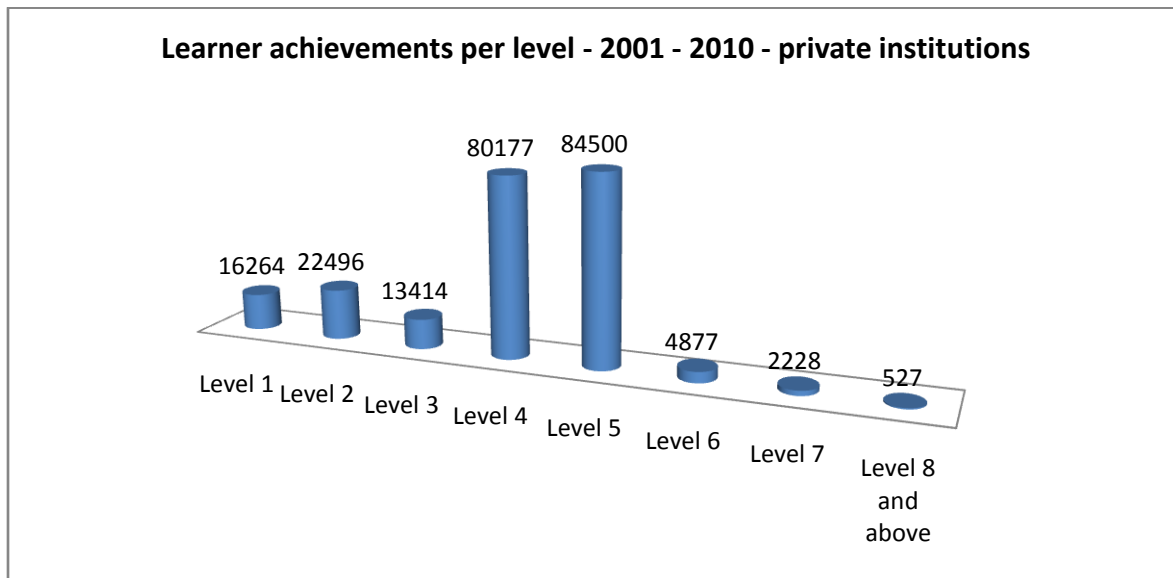


Figure 13: Learner achievements per NQF level – SAQA data

However, SAQA has pointed out that not all possible data have been uploaded on the National Learners' Records Database. The most notable exclusion is the data from the DHET's FETMIS and data from at least 25 private HE institutions not yet uploaded on the HEQCIS (a sub-set of the NLRD created to upload private HE data).

5.2 Learners by level and sector – DHET (HET) data

As noted in section 2, the learner enrolment data provided by the DHET (HET) is relatively outdated. The DHET provided data for the 2008 and 2009 academic years. Further, as indicated earlier in this report, this data deal with only ELOAC qualifications, or traditional HE qualifications such as Certificates, Diplomas and Degrees. All unit-standards based qualifications offered at levels 5 – 8/10 have been excluded. These will be discussed when the 8 sampled ETQAs data is analysed. In addition, the lack of verification of data, even where it was captured and analysed, make these datasets unreliable. Nevertheless, the data received from the DHET (HET) present a picture of high activity and delivery and should thus be seen as indicative of this sub-set of the sector, rather than trying to draw firm conclusions from it.

In 2008 there were 86 private HE institutions that submitted data in respect of student enrolment. Student enrolment ranged from below 100, enrolled at the George Whitefield institute, to more than 13 000 at Milpark Business School, with a total enrolment figure across all 86 institutions for the year 2008, at 75 190.

In 2009, 93 institutions submitted enrolment data. The total enrolment figure dropped to 69 608, but enrolment increased at some institutions, e.g. Milpark Business School's enrolment increased to 14 459.

By looking at the private HE institutions' enrolment figures, it is clear that in size the institutions range from very small, with less than 20 enrolments, to large (see below).

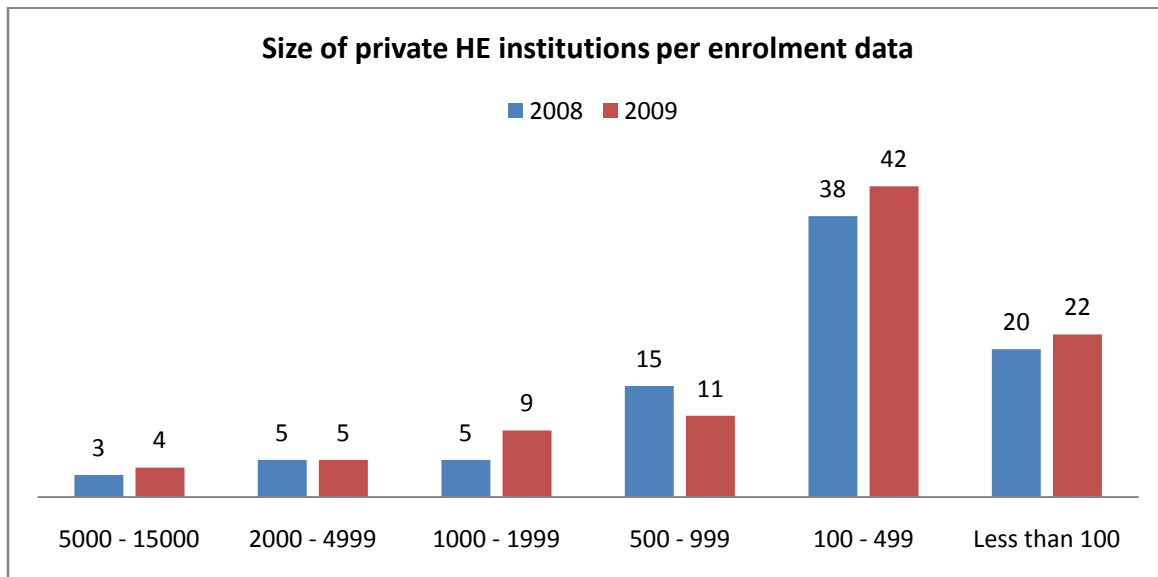


Figure 14: Size of institutions per enrolment data – DHET (HET) data

From the above it is clear that there are three to four institutions with the highest enrolments. Only five to nine institutions can be considered 'medium-sized' institutions with a 1000 to 5000 enrolments. The bulk of the institutions are small, or very small.

The largest institutions according to enrolment data are:

Table 11: Largest private HE institutions – DHET (HET) data

Institution	Enrolment 2008	Enrolment 2009
Milpark Business School	13 576	14 459
Independent Institute of Education	10 826	12 886
IMM Graduate College	7 161	6 783
PC Training and Business College	3 911	5 133
Lyceum College	2 311	2 552
Southern Business School	2 077	2 525
South African Theological Seminary	4 128	2 193
MANCOSA	2 209	2 155
Damelin	Below 2000 enrolments in 2008	2 039
Totals top ten private HEIs	46 199	50 725

Unfortunately the DHET (HET) data do not include achievement data, so it is difficult to assess how students were counted. A large number of students could, for example, have been enrolled for short courses. Thus, it is not known what the private HE institutions' contribution was in respect of Higher Certificates, Diplomas and Degrees. Nevertheless, the above figures are indicative of the size of this sub-sector.

5.3 Learners by level and sector – DHET (FET) data

The dataset received from the DHET (FET) section is much more comprehensive and detailed than many of the other sets. While this data have also not been verified in any substantial manner, an attempt was made in 2010 to site visit colleges to check desktop information against what is to be found at the site of delivery. As before, this data was derived from the DHET (FET) report on *Monitoring and Evaluation of Compliance and Performance of Registered Private FET Colleges* (March 2011). The majority of registered colleges appear to not have submitted data. The following discussions are based on data submitted by 175 registered institutions.

The total number of learners enrolled at these 175 colleges is 51 593. Given that there are 434 registered colleges, this number seems to be only a fraction of the total number. For a breakdown of the total number, refer to Table 12 overleaf (DHET, 2011, p. 10):

Table 12: Enrolment at 175 private FET colleges in 2010 – DHET (FET) data

CURRICULUM PROGRAMME / QUALIFICATIONS	TOTALS:
Headcount student enrolment for Occupational qualifications	40920
Headcount student enrolment for REPORT191 Programmes	7381
Headcount student enrolment for NC(V) Programmes	3292
TOTAL ENROLMENT	51593

The highest enrolment figure is for occupational qualifications (unit-standards based qualifications), followed by Report 191 (old technical college NATED qualifications), with the smallest number of enrolments for the relatively new National Certificate (Vocational) qualification (DHET, 2011).

The DHET (FET) disaggregated the above data per population group (Figure 15) (DHET, 2011, p. 11):

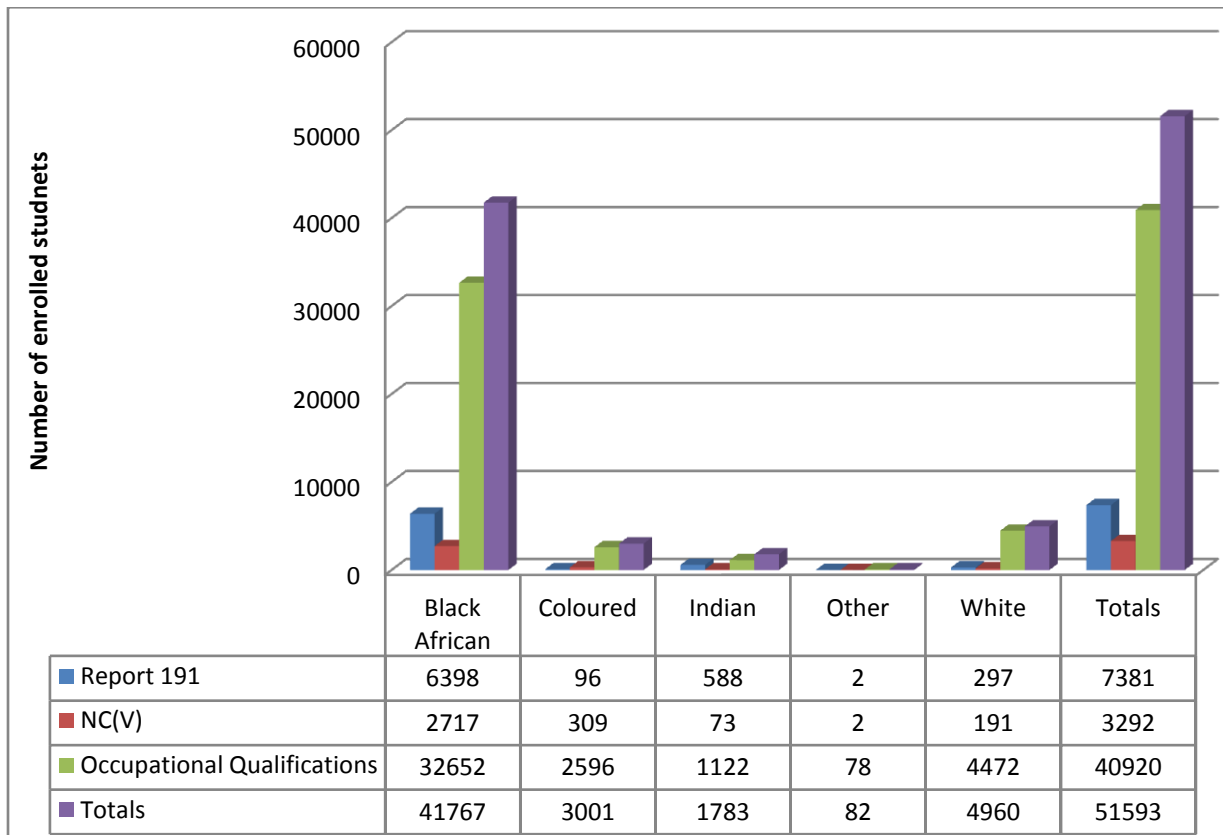


Figure 15: 2010 enrolment per population group – DHET (FET) data

It seems that private FET colleges are more accessible to particularly African students, and according to the DHET (FET) (2011, p. 11, 12), for the age group 40 and above in terms of occupational qualifications

and for Report 191, for the age group 17 – 26. In future studies, the demography of students attending private FET colleges, warrant deeper interrogation.

As in the case of private HE institutions, it is evident that according to enrolment numbers, the private FET sector can also be grouped into very small to large institutions ('large' being relative to the sector – the greatest enrolment figure is just below 4000). 122 institutions submitted their actual enrolment data (see below):

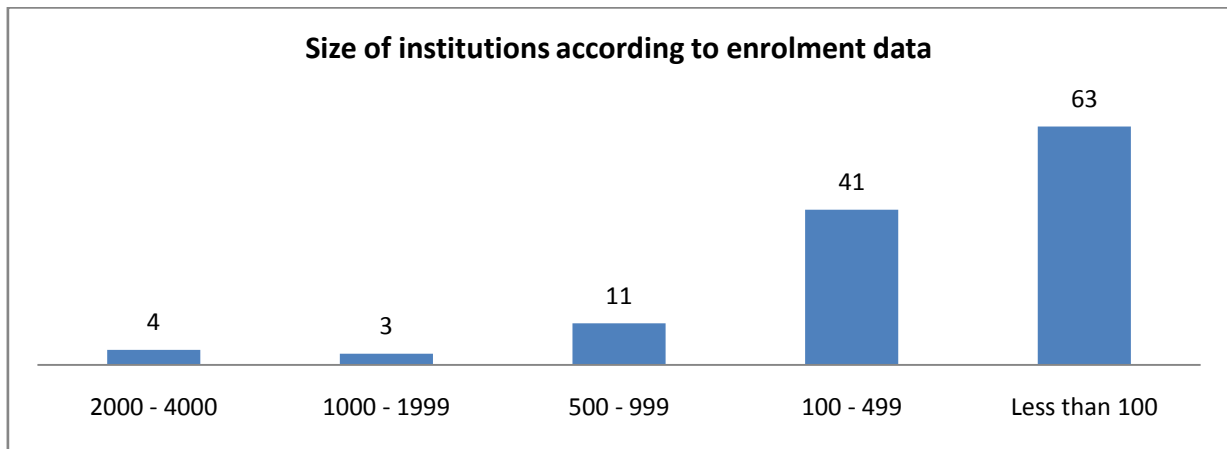


Figure 16: Size of institution per enrolment figures - DHET (FET) data

The top private FET institutions, in terms of enrolment figures are (Table 13):

Table 13: Largest private FET institutions – DHET (FET) data

Institution	Enrolment 2010
PC Training and Business College	3952
PCSIB	2426
Boston City Campus	2143
Jeppe College	2125
South African National Tutor Services	1899
Damelin	1094
DITASA	1092
Learnsys/Prior Learning Centre	818
Falcon Business Institute	803
TECCOM Training College	719
Totals – top ten private FET	17 071

Only 7 private FET colleges out of 122 that submitted enrolment data, had more than a 1000 students enrolled in 2010. As in private HE, the bulk of the colleges are small, or very small. The very small institutions may be 'workplace providers', associated with implementing learnerships.

5.4 Learners by level and sector – Sampled ETQA data

As noted in Section 2, a decision was made to, over and above the general data available on websites, limit seeking detailed information in terms of the brief of the study, to eight Education and Training Quality Assurance bodies (ETQAs), namely CHIETA, ETDP SETA, FASSET, MERSETA, MQA, SANC, Umalusi and W&RSETA. While the ETQAs were willing to provide such data, it was evident that none of them had the data readily available. This confirms one of the key findings of this study – there is an enormous amount of data available, but it is held in many different places and in many different formats, making analyses and comparisons across sectors difficult. In the end, only a few ETQAs submitted data, namely FASSET, MERSETA, MQA, SANC and Umalusi.

The ETQAs were requested to provide information in terms of the following:

- (1) Number of PRIVATE institutions as follows:
 - Higher education
 - Further education
 - Adult education (ABET)
 - Skills programmes
- (2) Size of, and enrolment figures per PRIVATE institution:
 - Large
 - Medium
 - Small
 - Number of learners per qualification
- (3) Number of for-profit and not-for profit institutions
- (4) Types and number of qualifications offered by PRIVATE institutions:
 - Unit-standards based
 - Exit level outcomes and assessment criteria (ELOAC)/curriculum and subject based
- (5) Location of PRIVATE institutions (per urban/rural; per province)

This section of the report will deal with (1), (2), (3) and (5). No. (4) will be discussed in section 6. However, it must be noted that even when the same set of questions were posed to the different ETQAs, they responded differently – some with a great amount of detail, while others responded in a global format. In some cases the amount of data provided was disappointing.

5.4.1 LEARNERS BY LEVEL AND SECTOR – FASSET

The Financial and Accounting Services Sector Education and Training Authority (FASSET) was selected for this sample because it seems to be a stable ETQA. Further, its association with the South African Institute for Chartered Accountants seemed to present a different dimension to the study. However, no notable data emerged from this assumption.

The data retrieved from the FASSET website and received from SAQA differ from data received from the ETQA official. In this case, it was explained as follows: ‘our website will indicate far fewer providers as we only list those that are accredited directly by FASSET on the website. The providers indicated here

include those accredited by our QAP (Quality Assurance Partners) and includes franchises and sites individually accredited that may belong to larger groups' (FASSET communiqué, June 2011).

The total number of institutions is 251, with a provincial spread as follows:

Table14: Number and provincial spread of private institutions – FASSET data

Province	Number of providers
Eastern Cape	3
Free state	8
Gauteng	81
KZN	30
Limpopo	9
Mpumalanga	10
North West	9
Northern Cape	1
Western Cape	21
Total	172

Further, all institutions are considered for-profit organizations. No statistics are kept in relation to the size of institutions. FASSET also has a few institutions classified as 'outside SA', 'SA National' and undefined.

5.4.2 LEARNERS BY LEVEL AND SECTOR - MERSETA

The Manufacturing, Engineering and Related Services Sector (MERSETA) was selected on the basis of the following criteria: stability of the ETQA and size of the economic sector; association with manufacturing and engineering apprenticeships.

MERSETA indicate that the institutional spread is as follows:

Table 15: Number of private institutions – MERSETA data

Number of Private institutions	Total
Higher education	323
Further education	2397
Adult education (ABET)	157
Skills programs	381
Total	3258

When the three datasets related to the number of MERSETA private institutions are compared, namely the SAQA data, the MERSETA website data and the data received on request, then the data discrepancies become much more evident. In Table 8, according to SAQA, there are 266 institutions accredited by MERSETA. The MERSETA website indicates that it has accredited 3412 institutions, but when the detailed information was provided, the total number of institutions came to 3258. While the unavailability of information about ‘expired’ or de-accredited institutions may account for the difference between the last two figures, it is clear that the SAQA database has not been updated. The question that emerges is whether it should be updated, and whether it is sufficient for ETQA institutional data to be held at the ETQA itself, and not at SAQA.

Nevertheless, the highest number of institutions is in the FET sector, followed by skills programme providers.

In terms of enrolment figures, MERSETA has provided data per type of delivery, namely qualifications, skills programmes, learnerships and apprenticeships. The latter two categories are linked with qualifications or will lead to a qualification. See Table 16 below:

Table 16: Enrolment per type of delivery – MERSETA data

Type of delivery	Total enrolment per type
Skills programmes	5 219
Learnerships	30 889
Apprenticeships	2 163
Qualifications	25
Total	38 296

These figures reflect unique learners that are unlikely to have been counted elsewhere, except for ‘apprenticeships’, which may have been counted at Umalusi.

The provincial spread of MERSETA institutions is as follows:

Table 17: Provincial spread – MERSETA data

Province	Number of institutions
EC	182
FS and NC	89
GP and NW	816
KZN	341
MP and LP	95
WC	375
Unknown	1
Total	1899

Again, the discrepancies in data are evident. The website data indicated 3412 institutions. An earlier submission indicated 3258 institutions and the final submission indicates 1899 institutions, possibly because the HE institutions and workplace providers have been removed.

5.4.3 LEARNERS BY LEVEL AND SECTOR – MQA

The Mining Qualifications Authority (MQA) was also selected on the basis of the size of the sector and the stability of the ETQA. Further criteria include association with trade qualifications and adult education. Surprisingly, while the mining sector is certainly a large sector, relatively few private institutions have been accredited by MQA, and equally surprisingly, only 11 ABET institutions have been accredited. The reason for this may perhaps only be evident when private/public comparisons are drawn. For example, it may be expected that many of the REPORT 191 (trade) qualifications are offered by public colleges, rather than private colleges. However, no such conclusions are possible without a deeper interrogation of all of the training provision under MQA. Further, MQA noted that it makes substantial contributions to the capacity development of public colleges, and that it offers bursaries and internship/workplace opportunities for learners from public institutions.

In terms of the data, there is a small discrepancy between data retrieved from the MQA’s website (100) and data from the detailed report (96) in response to the question about the number of institutions. However, the difference between the SAQA data and the data received directly from MQA is again 58 (SAQA) to 96 (MQA). Refer to the table below:

Table18: Number of private institutions – MQA data

Number of Private institutions	Total
Higher education	0
Further education	96
Adult education (ABET)	11
Skills programs	91 of which 42 also offer qualifications, thus 46
Total	153

In terms of enrolment figures, the MQA provided data ‘from inception, to date’¹². Most ETQAs were accredited by SAQA in 2001. The following figures therefore need to be understood in terms of the approximately ten years of the MQA’s existence:

Table19: Size of, and enrolment figures per private institution – MQA data

Size of institutions	Number of enrolments in the last ten years
Large	26 256
Medium	4 610
Small	3 514
Skills programmes	363 213
Total	397 593

The MQA did not provide achievement figures, but even without those figures, it is clear that private institutions have made a substantial contribution to the education and training of mining and associated industries practitioners. The most significant is the enrolment figures in terms of ‘Skills programmes’. MQA indicated that ‘there are certain skills programmes that are regulated within the Mines Health and Safety Act and its regulations, these skills programmes are incorporated within MQAs registered qualifications’, which means that while such programmes may not be considered to be a ‘qualification’ in the formal sense of the word, they are nevertheless considered crucial for the mining sector.

In response to question (3) dealing with for-profit and not-for profit institutions, the MQA has categorized their institutions along the lines of their direct association with a mine where education and training are provided for employees or future employees (Internal Training Providers), and External Training Providers who offer their services to the mines. According to this classification, there are 59 Internal Training Providers that are not-for profit institutions and 37 External Training Providers that are for-profit institutions.

In terms of the provincial spread, MQA has provided the following break-down:

Table 20: Provincial spread – MQA institutions

Province	Urban	Rural
KZN	3	0
WC	0	0
NC	3	5
EC	0	0
FS	6	3
NW	16	9
GP	26	0
LP	2	8
MP	8	7
Total	64	32

¹² Communiqué from MQA

5.4.4 LEARNERS BY LEVEL AND SECTOR – SANC DATA

The South African Nursing Council (SANC) was included in this sample because the brief for the study specifically requested it. All the private institutions are single purpose institutions, offering only the three legacy qualifications which do not seem to have been assigned to an NQF level.

The number and provincial spread of private Nursing Colleges are as follows:

Table 21: Number of and provincial spread of private Nursing Colleges – SANC data

Province	
KZN	30
WC	11
NC	0
EC	4
FS	4
NW	2
GP	28
LP	2
MP	4
Total	85

A total of 2050 learners are enrolled at the different institutions for 2011. According to SANC, all 85 institutions are for-profit organizations.

5.5.5 LEARNERS BY LEVEL AND SECTOR - UMALUSI

As with all the other datasets, the data from Umalusi also provides only a partial picture. First, as noted earlier, the data received relate to a sample of the 'confirmed candidates for accreditation' category of private institutions and not the 'recommended' or 'pending' institutions. Second, it does not deal with the SETA providers that have to be processed by Umalusi in order to refer such institutions to the DHET (FET) for registration.

Umalusi's data was collected in 2009 and 2010. The report which is currently being drafted compares the two datasets. From the draft report it is clear that there is a steady growth in the private FET system. For example, in 2009 a total of 238 learning sites¹³ were visited and were granted 'confirmed candidate' status. This figure represents 28 colleges. In 2010, the number of confirmed sites visited was 317, which reflects the status of 102 colleges. The data for this part of the report is therefore derived from information gained from a sample of these sites, namely 141 college learning sites in 2009 and 131 college learning sites in 2010.

The draft Umalusi report notes (Umalusi, in press, p. 27):

¹³ Umalusi accredits 'sites of learning' as unique entities, but many of these sites are part of multi-site institutions.

The rapid increase in the number of confirmed sites between 2008 and 2010 is a positive indication of the commitment of the sector to conform to the regulatory environment.

While this increase certainly does indicate that regulation is having the desired effect, for the purposes of this report, it indicates the expansion of the private FET system.

Umalusi’s draft report disaggregates learner enrolment per age group. Refer to Table 13 below (from Umalusi, in press, p. 37):

Table 22: Student enrolment per age group – Umalusi data of confirmed candidates (FET)

Year	17-18yrs	19-20 yrs.	21-22yrs	23yrs +	Total enrolment
2009	5 914	11 354	10 479	30 220	58 737
	10%	19%	18%	51%	
2010	2 307	9 104	3 446	9 237	24 295
	9.4%	37,4%	14%	38%	

However, despite the growth in the total number of institutions granted ‘confirmed candidate’ status, there has been a significant drop in student enrolments in 2010. The Umalusi report does not venture an opinion about it, but it should be noted that 10 less ‘confirmed candidates’ submitted reports in 2010.

In 2009 the greatest number of enrolments was in the age group 23+ yrs, while in 2010, this shifted to the 19 – 20 yrs age group (see Figure 17):

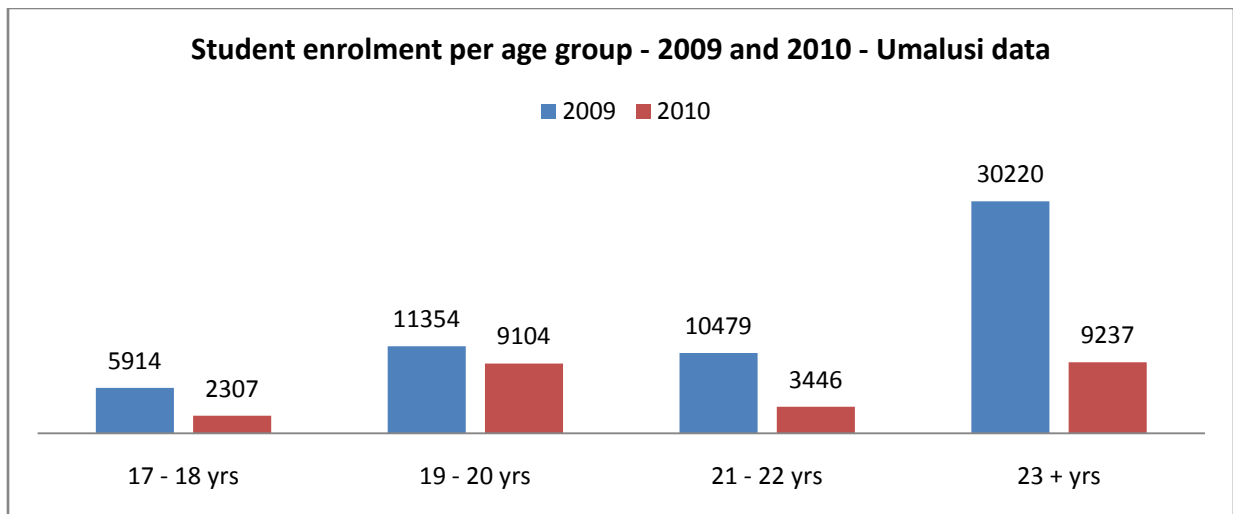


Figure 17: Student enrolment per age group – Umalusi data

6. Qualifications by level and sector

As in the previous sections, the data discussed in this section will have many overlaps or duplications, as many different organizations have attempted to analyse qualifications in relation to institutions and learner enrolments and achievement. To start, Table 10 (Table 23 below) repeated here, again provides a global picture, keeping in mind that even the SAQA data do not provide a full picture because of some exclusions. Also, this data reflect achievements, not current enrolments, which arguably would be a higher number. Finally, be reminded that students could be counted more than once in the figures reflected here. Nevertheless, even with all these caveats, it is clear that in terms of current achievement data available from SAQA, private post-school education institutions have made the greatest contribution as compared with the ‘mixed: public and private’ and the ‘unknown’ categories.

Table 23: Learner achievements to date – SAQA data

Provider Class	Total	NQF Level (Old)			
		Level 1-4	Level 5	Level 6 upwards	Unknown
Private	537362	293586	205767	33027	4982
Mixed: Public and Private	80207	59016	2723	18395	73
Unknown	197286	161175	31381	2797	1933
Total	814855	513777	239871	54219	6988

More detailed information about the number of qualifications by level and sector will be discussed per organization.

6.1 Qualifications by level and sector – DHET (HET) data

This dataset was derived from the DHET (HET) register of 87 private HE institutions. Each institution, when registered, receives a registration certificate which details the qualifications for which that institution has been accredited to offer. From the Register it is clear that private HE institutions offer a range of qualifications as defined in the draft Higher Education Qualifications Framework (HEQF). All of these qualifications, in order to be legitimate, have been assessed by the Council on Higher Education and have been registered on the NQF by SAQA, in most cases against the name of the institution offering such a qualification. There were a few exceptions where the name of a qualification appeared on the registration certificate of the institution, but not on the SAQA searchable database.

According to the DHET (HET) register (11 May 2011 update), private HE institutions offer qualifications across the full range of higher education programmes, namely Higher Certificates, Advanced Certificates, Diplomas, Advanced Diplomas, Bachelor’s degrees, Bachelor Honours degrees, Postgraduate diplomas, Master’s degrees and Doctoral degrees. An additional three ‘types’ of qualifications appear ,namely ‘Certificate’, ‘Higher Diploma’ and ‘Graduate Diploma’, . These were verified on the SAQA searchable database, but do not appear on the draft HEQF list of qualifications. A

few 'National Certificates', also appear on the Register, which seem to be associated with Banking qualifications. It is not clear whether these are curriculum-based or unit-standards based qualifications.

Further, with the promulgation of the NQF Act in 2008, the 8-level framework changed to a 10-level framework. This affects qualifications that may move a level up or down. A large sample of all the qualifications offered by private HE institutions as captured in the DHET (HET) register of institutions was verified against the NLRD data. It became clear that there are a number of qualifications where the new level is 'pending' (www.saga.org.za, June 2011), but many have already been changed to new levels.

Nevertheless, in the analyses that follow the levels as proposed in the draft HEQF will be used as follows:

Table24: Levels of qualifications according to the HEQF

Qualification type	NQF Level	Credit value
Higher Certificate	5	120
Advanced Certificate	6	120
Diploma	6	360
Advanced Diploma	7	120
Bachelor's Degree	7	360
Bachelor's Degree	8	480
Bachelor Honours Degree	8	120
Postgraduate Diploma	8	120
Master's Degree	9	180
Doctoral Degree	10	360

The most popular types of qualifications offered by private HE institutions are Certificates and Higher Certificates (99), Diplomas (175) and Bachelor Degrees (122).

The most popular fields of learning at the Certificate and Higher Certificate level are in descending order: Field 3¹⁴: Business, Commerce and Management Studies, Field 10: Physical, Mathematical, Computer and Life Sciences, Field 7: Human and Social Studies (Theology and Ministry), and Field 2: Culture and Arts (Design studies). See Figure 18 below:

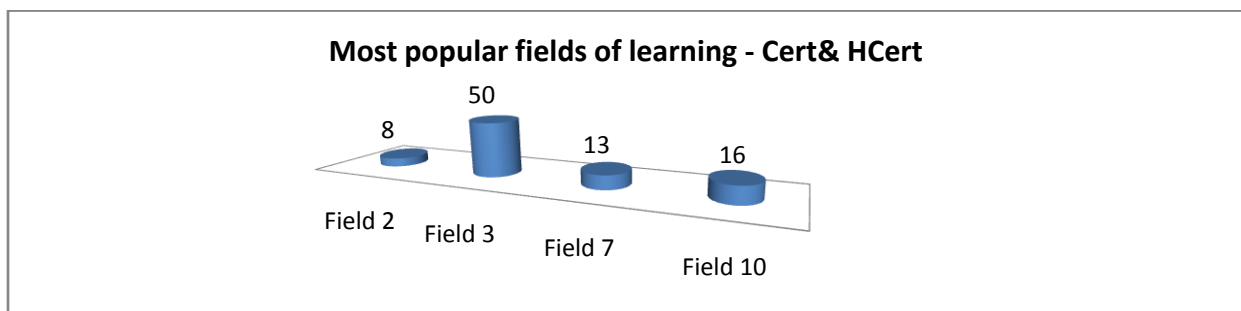


Figure 18: Most popular fields of learning – Certificates and Higher Certificates

¹⁴ For a full list and description of the Fields of Learning – go to Annexure B

When interrogating the range of offerings at the Diploma, Advanced Diploma and Higher Diploma level, a similar trend emerges, except for the emergence of Field 9: Health Sciences and Social Services, which include qualifications for the beauty industry and alternative therapies sector:

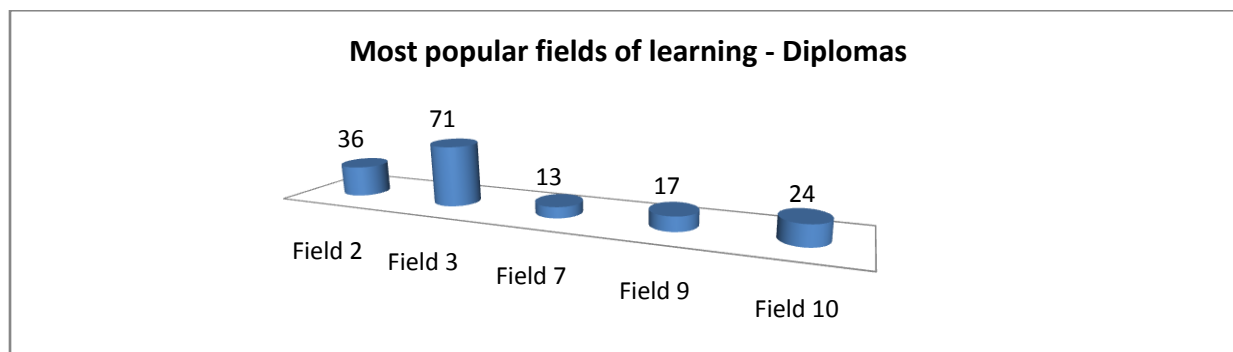


Figure 19: Most popular fields of learning – Diplomas, Advanced Diplomas and Higher Diplomas

Bachelor’s Degrees are the next most popular type of qualification offered at private HE institutions. In the table below, the range of degrees are presented:

Table 25: Most popular types of qualification: Bachelor’s Degrees

Qualification type	Designation	No of qualifications
Bachelor’s Degree	Bachelor of Arts	35
	Bachelor of Business Administration	12
	Bachelor of Commerce	16
	Bachelor of Science	8
	Bachelor of Theology	18
	Other (mixed)	12
Honours Degree	Bachelor of Arts (Hons)	12
	Bachelor of Commerce (Hons)	3
	Other (mixed)	6
Totals Bachelor’s Degrees		122

Please note that each of the qualifications have been counted as individual entries even where the field of learning or the name of the qualification is similar, or the same, as qualifications offered at other institutions. This is because institutions do not follow a national, common curriculum. Thus, it is assumed that these qualifications, despite being named in a similar manner, are sufficiently different from each other to warrant being counted as unique qualifications.

When looking closer at the fields of learning in terms of the broad categories of Bachelor of Arts, Bachelor of Business Administration, Bachelor of Commerce and the Bachelor of Theology, then it becomes evident that the most popular fields of learning is Field 2: Culture and Arts, (which includes sub-fields such as: Design, Visual Arts, Performing Arts, Cultural studies, Music, Sport, Film, Television and Video); Field 3: Business, Commerce and Management Studies and Field 7: Human and Social Studies, which include religious studies. More than two-thirds of the Bachelor Degrees and Bachelor

Honours Degrees fall within these three fields. Moreover, the Bachelor of Commerce and the Bachelor of Business Administration together make up the highest number of qualifications offered at private HE institutions, namely 37 programmes.

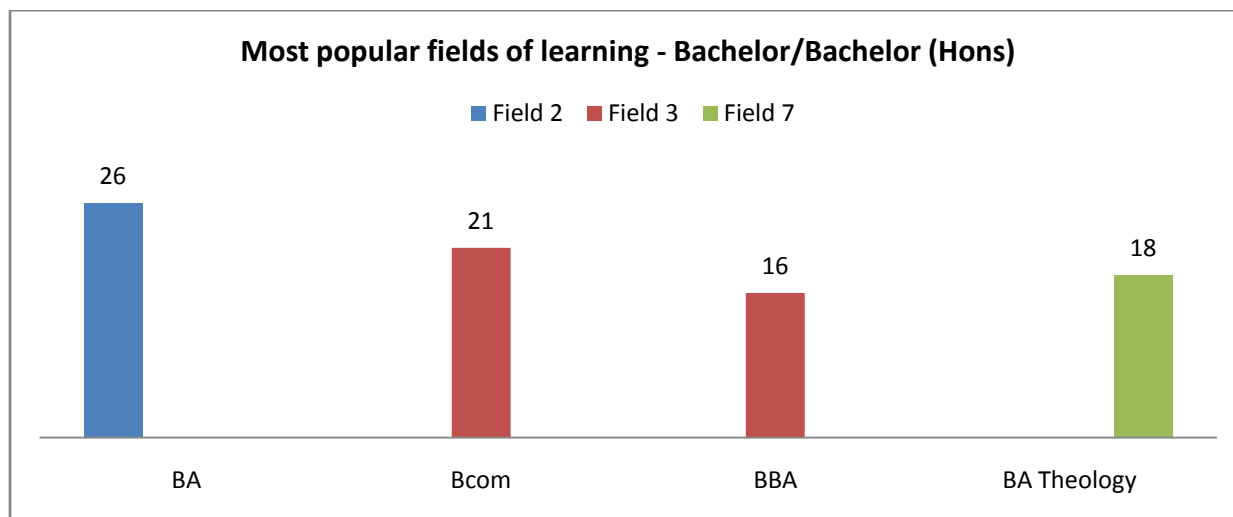


Figure 20: Most popular fields of learning – Bachelor/Bachelor (Honours)

Apart from Bachelor (Honours) degrees, relatively few post-graduate degrees are offered by private HE institutions. The table below details such qualifications:

Table 26: Post-graduate degrees offered by private HE institutions

Type of qualification	Field of learning	No of qualifications
Post-graduate diploma	Business, Commerce and Management (Field 3)	11
	Other (Fields 5, 8 and 9)	5
Masters Degrees	Masters of Philosophy (Religious Studies, Applied Ethics, Theology, Education) (Fields 5 and 7)	8
	Masters of Business Administration (Field 3)	7
	Masters of Commerce (Field 3)	2
	Other (Fields 2, 10)	3
Doctoral Degrees	Technology and Innovation (Field 10)	1
	Theology and Philosophy (Field 7)	3
Totals Postgraduate degrees		40

Please note that the analysis of the fields of learning was done at face value. In other words, without being able to interrogate the curricula of the qualifications, certain assumptions had to be made. The allocation of qualifications to certain fields should therefore be seen as indicative only.

As a general guideline though, it is clear that across all types and levels of qualifications, private HE institutions offer programmes in four broad fields of learning:

Table27: Most popular fields of learning offered by private HE institutions

No	Field of learning	Description – particular focus
2	Culture and Arts	Design studies, Visual arts, Performing arts, Music, Sport, Film, television and radio
3	Business, Commerce and Management Studies	Finance, economics and accounting, Generic management, Human resources, Marketing, Office administration, Project management and Public relations
7	Human and Social Studies	Politics, Religious and Ethical studies
9	Health Sciences and Social Services	Preventative Health, specifically in terms of the beauty industry and alternative therapies
10	Physical, Mathematical, Computer and Life Sciences	Information technology and computer sciences

6.2 Qualifications by level and sector – DHET (FET) data

The DHET (FET) data were extracted from two sources. The first part deals with data collected through the annual monitoring and evaluation exercise of the DHET (FET) and was captured in the report entitled *Monitoring and Evaluation of compliance and performance of registered private colleges* (March 2011), and the second part from an analysis done by DHET (FET) in June 2011.

Figure 21 below reflects achievement data (DHET monitoring report, 2011). Report 191 and NC(V) programmes are examined through annual national examinations, and thus it is possible to present achievement data, but in this case the report reflects results in respect of only Report 191 qualifications (DHET, 2011, p. 25):

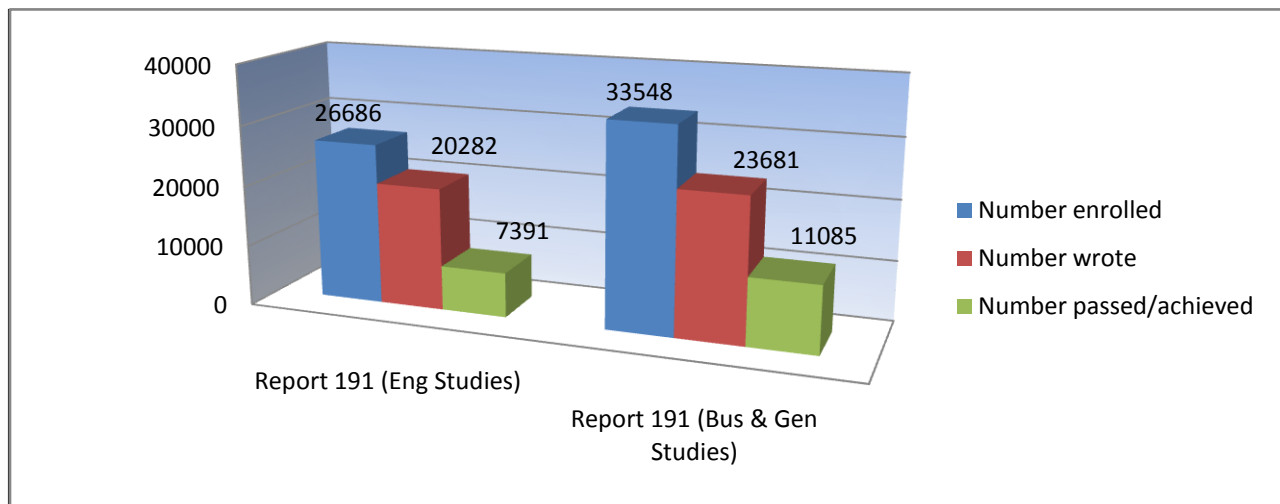


Figure 21: Examination enrolment and achievement data – DHET (FET) data

Apart from an indication of enrolment figures in respect of these qualifications, it is when the levels of these qualifications are examined, that an interesting picture emerges. From the above it is evident that ‘college-like’ post-school qualifications, which are not university programmes, are very popular, despite the relatively poor performance of students in these qualifications. In terms of Report 191 the

programmes have not been assigned to an NQF level, but it is clear that they stretch from after the compulsory schooling phase (Grade 9), namely N1 – 3; to post-matric/post-school programmes, e.g. N4 – N6.

Table 28 details the programmes students registered for in 2010 (DHET, 2011, p. 24) (see overleaf):

Table 28: Examination Enrolment for Report 191 Programmes –DHET (FET) data

ENGINEERING STUDIES PROGRAMME	N CERTIFICATE LEVEL
Engineering Studies	N1 – N6
BUSINESS & GENERAL STUDIES PROGRAMME	N CERTIFICATE LEVEL
Business Studies	N2
Educare	N2 – N3
Agriculture	N3
Art	N3
Business Studies: Accounting/Admin	N3 & NSC
Business Studies: Secretarial	N3 & NSC
Cosmetology	N3 & NSC
Food Services	N3 & NSC
Hair Care	N3 & NSC
Hair Care & Cosmetics	N3 & NSC
Social Services	N3 & NSC
Multi-Disciplinary Drawing Office Practice	Introductory , N4 – N6
Art and Design	Introductory , N4 – N6
Business Management	Introductory , N4 – N6
Clothing Production	Introductory , N4 – N6
Educare	Introductory , N4 – N6
Financial Management	Introductory , N4 – N6
Hair Care	Introductory , N4 – N6

Table 28: Examination Enrolment for Report 191 Programmes –DHET (FET) data (Continued)

Hospitality and Catering Services	Introductory , N4 – N6
Human Resource Management	Introductory , N4 – N6
Legal Secretary	Introductory , N4 – N6
Management Assistant	Introductory , N4 – N6
Marketing Management	Introductory , N4 – N6
Medical Secretary	Introductory , N4 – N6
Popular Music: Composition	Introductory , N4 – N6
Popular Music: Performance	Introductory , N4 – N6
Popular Music: Studio Work	Introductory , N4 – N6
Public Management	Introductory , N4 – N6
Public Relations	Introductory , N4 – N6
Tourism	Introductory , N4 – N6

The DHET (FET) differentiates between ‘occupational’ qualifications and Report 191 and the NC(V) programmes, with occupational qualifications being unit-standard based qualifications quality assured by SETA ETQAs. As seen earlier in the report, the larger proportion of student enrolments is in occupational qualifications. The DHET (FET) drew data from the SAQA NLRD for an analysis of enrolment and achievement data (March 2011). This data has been updated in June 2011.

From this dataset it is clear that private FET institutions offer qualifications across most of the economic sectors¹⁵, as well as some of the other ETQAs such as SANC and SABPP. This analysis reflects qualifications at NQF level 2, 3 and 4, namely qualifications in the ‘FET band’.

The numbers in the left hand column in the table below, under ‘Levels and total qual’s ’ refer to the NQF level (2,3,4), and the column on the right hand side refer to the number of qualifications from that particular economic sector that is being offered by a range of private FET institutions. Refer to Table 29 (overleaf):

¹⁵ These are according to the old configuration of SETA ETQAs

Table29: Number and levels of qualifications per economic sector – DHET (FET) analysis

Economic sector	Levels and total qual's		Economic sector	Levels and total qual's		Economic sector	Levels and total qual's	
Agri SETA	2	8	FASSET	-	-	MQA	2	9
	3	5		3	4		3	14
	4	3		4	6		4	5
Bank SETA	-	-	FOODBEV	2	4	PSETA	2	-
	-	-		3	9		3	2
	4	1		4	2		4	1
CETA	2	6	FIETA	2	2	SABPP	-	-
	3	7		3	2		-	-
	4	2		4	1		4	1
CTFL	2	4	HWSETA	2	1	SANC	-	-
	-	-		3	1		-	-
	-	-		4	4		4	1
CHIETA	2	14	INSETA	2	1	SERVICES	2	6
	3	17		3	1		3	5
	4	14		4	12		4	17
ESETA	2	11	ISETT SETA	-	-	THETA	2	3
	3	6		3	1		3	3
	4	9		4	2		4	6
ETDP SETA	2	-	MERSETA	2	30	W&R SETA	2	3
	3	-		3	25		3	2
	4	6		4	19		4	3

In addition to the above, CHIETA identified 2 ‘undefined’ qualifications which seem to be associated with trade qualifications, and MERSETA identified two additional sets, namely 13 ‘Provider-based’ and 27 ‘Trade (inactive)’ qualifications. Nevertheless, it is clear from the table that a substantial number of CHIETA, MERSETA, MQA and SERVICES SETA qualifications are offered by private FET colleges. However, it is when the number of enrolments per sector is interrogated when the areas of high activity becomes evident.

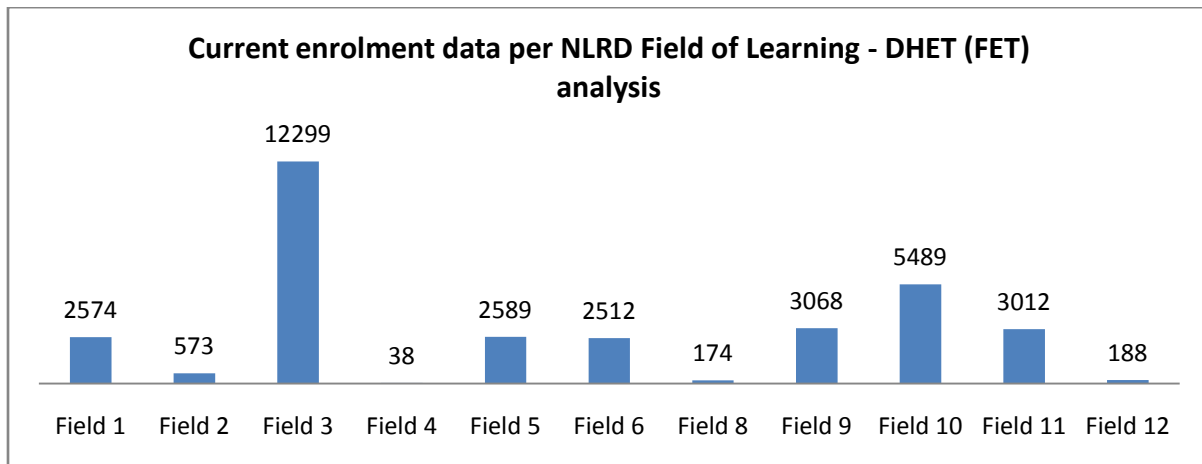


Figure 22: Current enrolment data per NLRD Field of Learning – DHET (FET) analysis

From the above it emerges that the highest enrolment is in Field 3: Business, Commerce and Management Studies – with 12 299 enrolments; followed by Field 10: Physical, Mathematical, Computer and Life Sciences- with 5 489 enrolments. Other notable fields, in descending order include Field 9: Health Sciences and Social Services (3068), Field 11: Services (3012), Field 5: Education, Training and Development (2589); Field 1: Agriculture and Nature Conservation (2574); and, Field 6: Manufacturing, Engineering and Technology (2512). According to the DHET (FET) analysis of the NLRD Fields of Learning, a total of 32 516 students are currently enrolled for occupational qualifications.

The spread across the levels as per the DHET (FET) data is as follows:

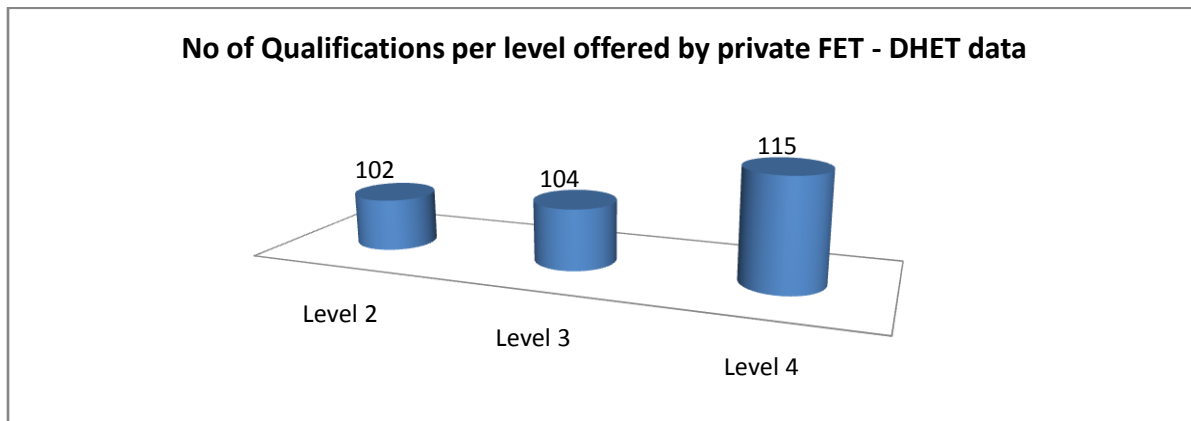


Figure 23: No of qualifications offered by private FET colleges – DHET (FET) data

6.3 Qualifications by level and sector – Umalusi data

As noted earlier, the Umalusi dataset has been derived from the monitoring reports of the ‘confirmed candidates’ category. Of the 376 ‘confirmed candidates’, 113 private FET institutions in this category submitted the monitoring report. According to the Umalusi draft report (in press), the types and qualifications offered at private FET colleges accredited by Umalusi include:

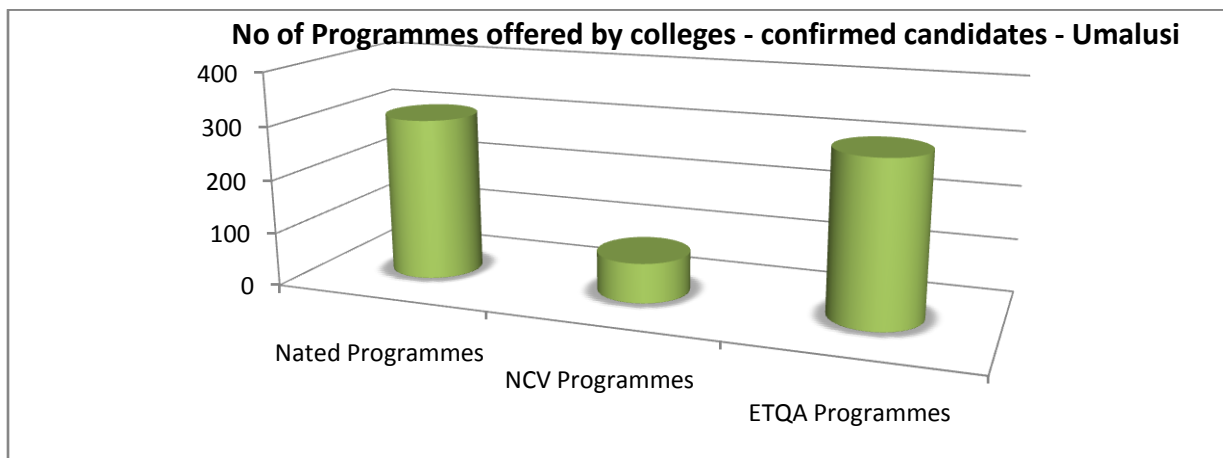


Figure 24: Qualifications offered by private FET colleges – Umalusi data

From the above it is clear that the NATED programmes (Report 191) are very popular, as are the ETQA programmes (occupational qualifications).

The most popular NATED/Report 191 programmes include (Figure 25):

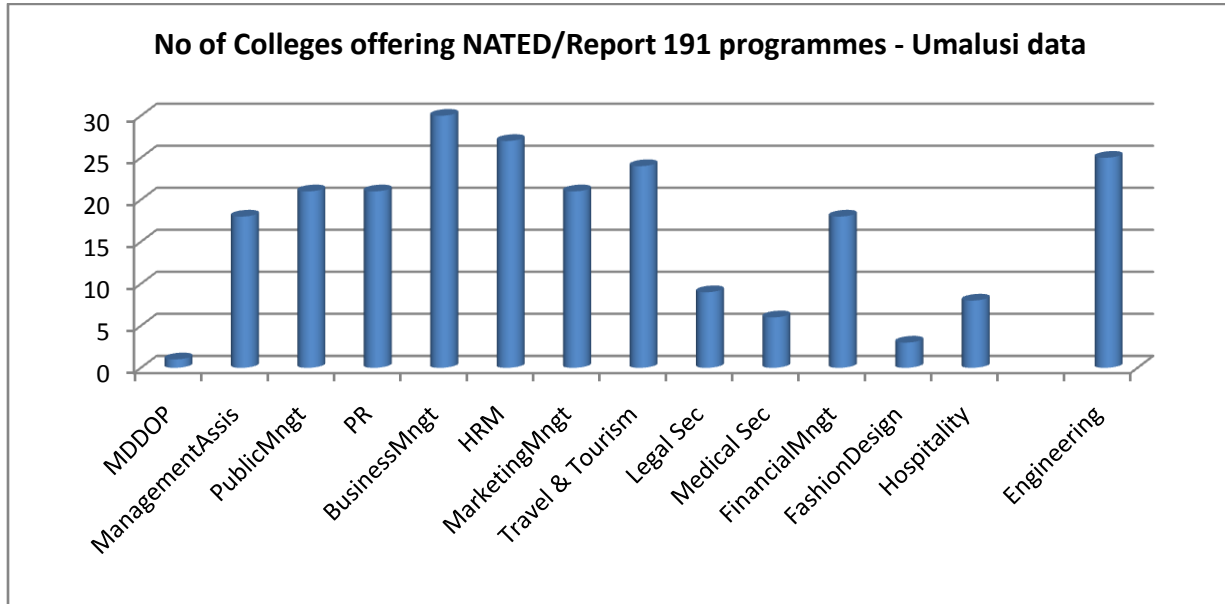


Figure 25: NATED/Report 191 programmes offered by private FET colleges – Umalusi data

There is a high correlation between the DHET (FET) analysis and the Umalusi data in terms of the most popular fields of learning, namely Field 3: Business, Commerce and Management Studies, reflected in Figure 25 above e.g.: Management assistant; Business management, Financial management, and so on.

However, it is clear that most institutions offering the NATED/Report 191 programmes, the post-matric programmes are much more popular. This may have been influenced by the proposed phasing out of the NATED/Report 191. The N1 – 3 may shortly catch up with N4 – 6. See below:

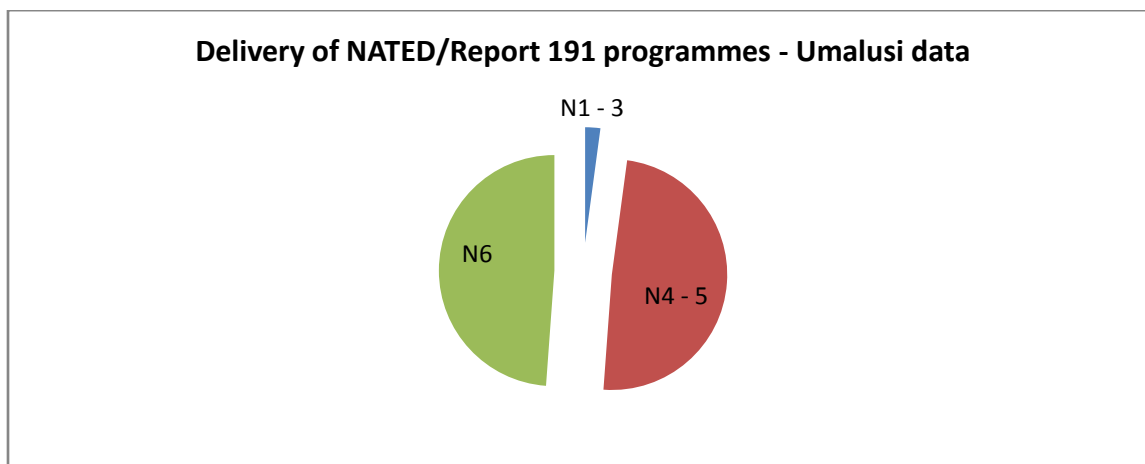


Figure 26: Delivery of NATED programmes – Umalusi data

When the data about the NC(V) programmes are interrogated, it again becomes evident that Field 3 is the most prevalent, e.g. Management, Marketing, Finance, Office administration. Other popular fields emerging include Field 10 in terms of the Information Technology programmes, and Field 8: Law, Military Science and Security programmes. See below:

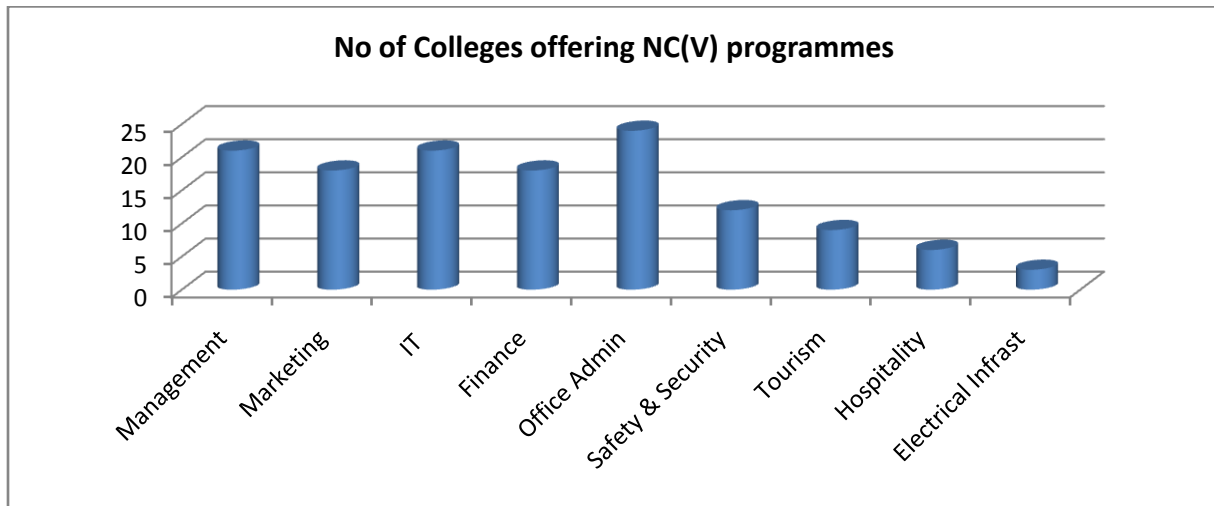


Figure 27: NC(V) programmes offered by private FET colleges – Umalusi data

However, institutions accredited by Umalusi, also offer ‘occupational’ qualifications. The following emerged:

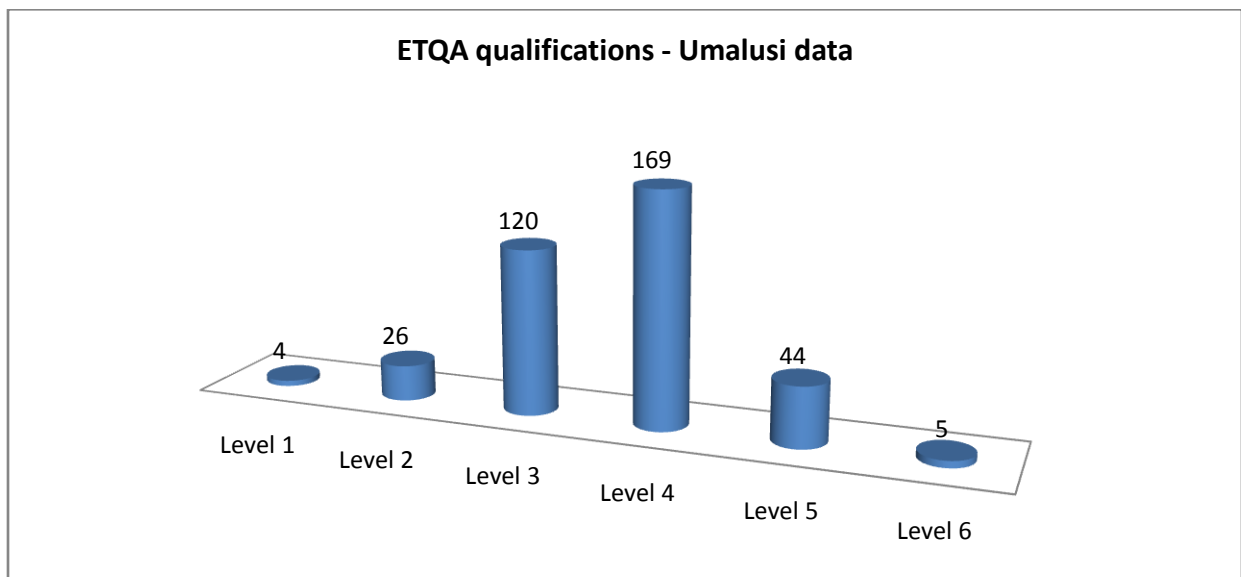


Figure 28: Levels of SETA/ETQA qualifications offered by Umalusi accredited institutions

Private FET colleges offer programmes across the FET band, but also extend to the GET band and the HET band. Nevertheless, most programmes offered are at NQF Level 4.

In Figure 29 below, it is clear that for the sample of institutions (n=113) used in this analysis, the most popular programmes fall within the ambit of responsibility of the ISETT SETA (Information Technology), followed by FASSET (Financial and Accounting) and Services SETA:

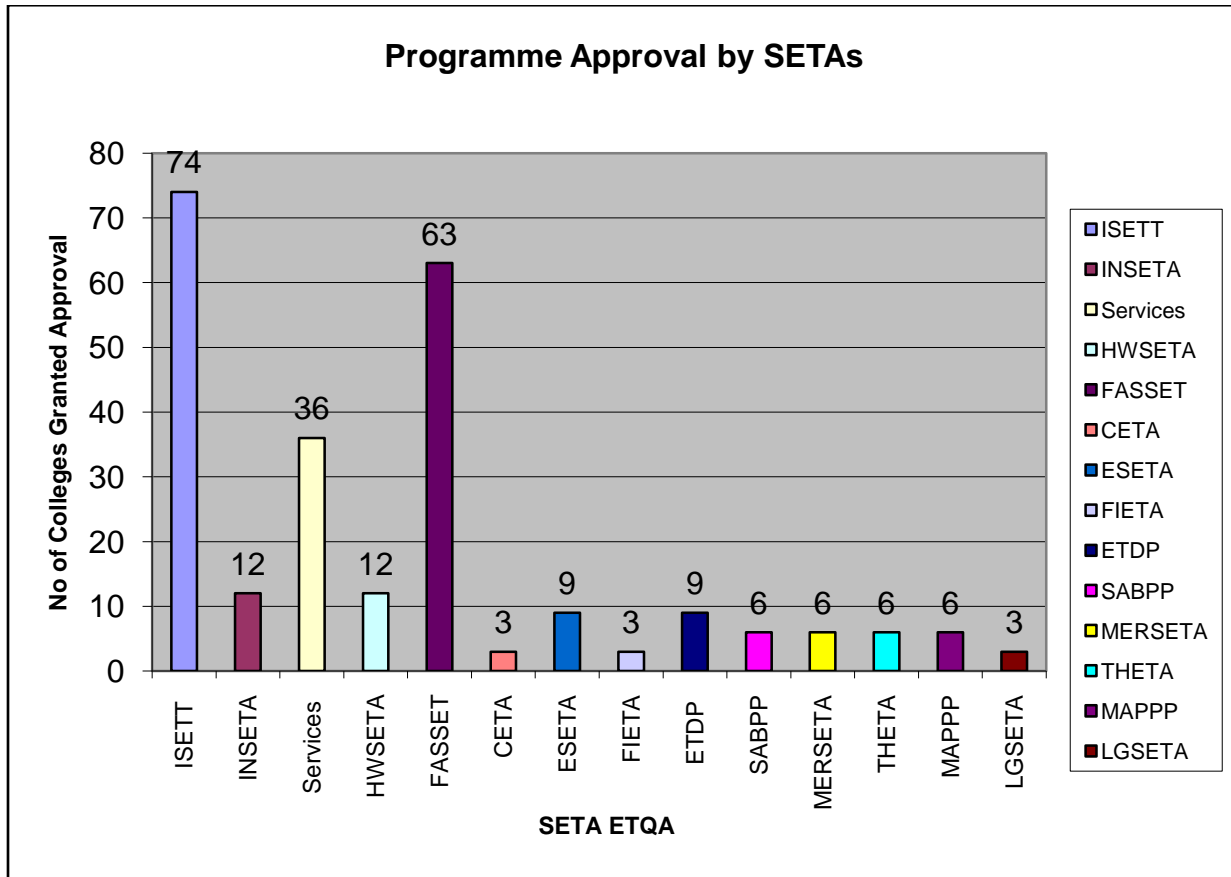


Figure 29: Most popular SETA/ETQA programmes offered – Umalusi data

7. Research studies

In South Africa, very little research has been done with private post-school education as a focus. Most research undertaken by Sector Education and Training Authorities relate to their Sector Skills Plans, and while these can certainly be used to get a sense of the size and shape of private post-school education, it will again, as in all the other data sources contain duplications.

Nevertheless, some studies have been undertaken, including:

- Akojee, S. (2005). Private further education and training in South Africa: the changing landscape.
- Akojee, S. (2008). Post-school private education and training providers in South Africa: What works?
- Mabizela, M. (2005). The business of higher education: a study of public-private partnerships in the provision of higher education in South Africa.
- Umalusi, (2008). FET Private Providers Site Visit and Verification Report
- Umalusi (2008). Umalusi's Site Visits to Private Adult Education and Training (AET) Providers 2007
- Umalusi (in press). An Umalusi survey of Confirmed Private Colleges and Adult Education Institutions 2009/2010

8. Conclusion and recommendations

The Green Paper process presents an opportunity to reconceptualise an integrated education and training system which will truly encompass all the elements of a vibrant and differentiated public and private system capable of addressing the needs of a diverse student population ranging from adults that have never gone to school, to post-school youth. The brief of the study was to establish the size and shape of one of the elements or such a system – the private post-school system. Notwithstanding the limitations of the study (see section 2), particularly in respect of the veracity of the data, it is clear that the private post-school system is not only substantial, it is expanding. As the regulation of the private system improves and matures, it will become increasingly possible to assess the contribution the private system is making in real terms.

There are a number of caveats relevant to this study, most of which relates to the duplications, overlaps and gaps in the data. Nevertheless, it is possible to draw some broad, tentative conclusions in terms of the brief:

8.1 Total number of students in the private post-school system

It is almost impossible to assess the total number of students in the private post-school system. SAQA's data suggest that an impressive 537 362 students in approximately 20 years (1991 – 2010) had achieved qualifications through private post-school education, excluding those students that may also fall within the categories of 'Mixed: Public and Private' and 'Unknown', and which may have been counted more than once (see Table 10). However, what is more telling, and still only looking at the SAQA data, is the evident growth of the private system in the last 10 years. In 2001 only 6 436 students graduated from

the private system, but in 2010, this has increased to 35 402. However, SAQA admits that it does not have the full scope of the data (see p. 33) – most notable exclusions include the FETMIS (DHET FET) data and at least 25 private HE institutions' data.

Taking the above into account, and recognizing that the next set of data will overlap with the SAQA data, private HE, according to the DHET (HET), contributed 75 190 student enrolments in 2008, and 69 608 enrolments in 2009. Again, the most notable exclusion from this dataset is the NQF level 5 – 8/10 unit-standards based qualification data.

In terms of private FET enrolment data, it is even more difficult to determine the extent of overlaps and/or gaps. The two main data sources used for this part of the report (DHET (FET) and Umalusi), cannot be compared as DHET (FET)'s data is based on less than half of the registered colleges and Umalusi's data reflects only a sample of their accredited institutions. Nevertheless, according to DHET (FET), 51 593 students were enrolled in 2010 in 175 registered colleges (out of 434). Taking into account that the students counted by DHET (FET) will overlap with students counted at Umalusi, in 2009, according to Umalusi's dataset, 58 737 students were enrolled in 141 colleges, and in 2010, 24 295 students were registered at 131 learning sites.

Again, remembering that there will be overlaps with DHET (FET), Umalusi and all the other Education and Training Quality Assurance bodies (a further 28 ETQAs), it must be acknowledged that the above figures could only be a fraction of the real current enrolment figures. MERSETA alone, for example, indicated that across four different categories (skills programmes, learnerships, apprenticeships and qualifications), 38 296 students are currently enrolled.

Thus, while at this stage, it is not possible to indicate the number of students currently enrolled at private post-school institutions, it is clear that a large number of people are being serviced by this sector.

Further, trying to assess the number of students at private Adult Education and Training (AET) centres was abandoned. There are currently too many other systemic issues that will have to be considered and interrogated before venturing any opinion about private AET provision in South Africa.

8.2 Total number and size of private post-school institutions

With regard to the total number of private post-school institutions in the system, it is no less difficult to come to a final figure. It is clear that SAQA's data have many gaps. Likewise, from the differences between data retrieved from websites and actual data (in the case of the few ETQAs that submitted recent data), it is evident that data available to the general public is not necessarily correct. Again, without comparing lists of institutions across all ETQAs, compared to SAQA's data, there is no way of knowing how many institutions have been counted more than once, or may have been excluded.

Nevertheless, it seems that there may be anything between 8 000 and 12 000 private post-school institutions of various shapes and sizes (see Tables 8 and 9). What is clear though is that there are only a

few medium to large institutions, with the bulk of the institutions in all sectors (AET, FET and HE) being small or very small.

In the private HE sector there seems to be a greater number of institutions that are not-for-profit (Section 21) companies than in the private FET sector. However, in the private FET sector, additional dimensions to the typology of institutions have been added, namely 'Conventional College, 'Education and Training Provider' and 'Workplace Provider', which seems to correspond with the type of qualification offered as well as with the mode of delivery (e.g. learnerships, apprenticeships).

Further, a multi-purpose/single purpose differentiation is not as simple as it seems. Many multi-purpose institutions, for example, will also be counted by ETQAs which has a single purpose, e.g. Damelin may be counted by a number of ETQAs in terms of programmes for which it has achieved 'programme approval'. This kind of typology may no longer be useful, and in fact, may lead to further duplication of data.

In terms of provincial spread, private post-school institutions occur in all provinces, with the highest number of institutions across all sectors in Gauteng, followed by Western Cape, Kwazulu-Natal, Eastern Cape and Limpopo.

8.3 Types of qualifications and economic sectors

Private institutions offer qualifications across all levels and types. Excluding NQF 5 – 8/10 unit-standards based qualifications (see earlier discussion), private HE institutions offer all the traditional HE qualifications as described in the HEQF. However, the most popular type of qualification offered at these institutions, is the Diploma, followed by Bachelor's Degree and Certificates. The most popular post-graduate qualification offered is Bachelor (Honours). In terms of fields of learning, private HE institutions are most likely to offer qualifications in the following economic sectors: Design (Field 2), Business, Commerce and Management studies (Field 3) and Religious studies (Field 7).

Private FET institutions offer a wider range of 'type' of qualification, including occupational, unit-standards based qualifications (most often), Report 191/NATED qualifications, and the NC(V) programmes (least often). While the occupational qualifications are mostly offered at NQF levels 3 and 4, the Report 191/NATED qualifications are mostly at the post-matric level (N4 – N6). In terms of occupational qualifications, the most popular field of learning is Field 10 (Information Technology and Computer Science), while in terms of Report 191/NATED qualifications, Field 3 (Business, Commerce and Management Studies), are most often offered.

8.4 Recommendations

The most important recommendation relate to data management, including data generation, collection and analyses. The lack of congruence between different datasets seriously constrain the system's ability to assess and evaluate the contribution that the private post-school sector is making, as well as the possible planning and steering mechanisms that may be most useful for the system.

Secondly, as noted in the introduction, this study can be considered as being only a first step in understanding the dynamics of the private post-school system. If the private system is to be taken seriously in terms of the contribution it can make to the enormous need of out-of-school youth and adults, this study must be followed up by a number of further studies:

- The assessment of the scale of duplication and/or gaps in terms of data across the sector with the purpose of identifying mechanisms to bring all of the data ultimately under one authority.
- The strengths and weaknesses of the private post-school sector with the purpose of fully utilizing the sector in terms of the needs of the post-school system as a whole.
- The typologies of institutions. When is an institution an institution? Can small or very small providers considered to be institutions?
- Private Adult Education and Training. Meaningful data about private AET provision was very hard to come by – not because there is no data available, but because of a number of systemic issues constraining the quantification of private adult education including the fact that in most cases AET is only offered up to ABET level 3, or only in piecemeal format (e.g. only some unit standards are offered, and not a full qualification).
- The demographic features of students registering at private post-school institutions. The data seem to suggest, for example that private HE institutions attract a different student population than private FET and AET, with the most vulnerable groups to be found in the latter two sectors.
- The articulation and progression routes between and amongst private and public institutions. While this was not the focus of the study, the lack of mobility of students between these two sub-sectors may constrain the achievement of an integrated, diverse system.

9. References

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Umalusi, (in press). An Umalusi survey of Confirmed Private Colleges and Adult Education Institutions 2009/2010

10. Annexure

10.1 Annexure A

No	ETQA acronym	ETQA name
1	AgriSETA	Agricultural Sector Education and Training Authority
2	BankSETA	Banking Sector Education and Training Authority
3	CATSSETA (new)	Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority
4	CETA	Construction Sector Education and Training Authority
5	CHE	Council on Higher Education's Higher Education Quality Committee
6	CHIETA	Chemical Industries Sector Education and Training Authority
7	CTFL	Clothing, Footwear and Leather Sector Education and Training Authority
8	ETDP	Education, Training and Development Practices Sector Education and Training Authority
9	E(W)SETA	Energy and Water Sector Education and Training Authority
10	FASSET	Financial and Accounting Services Sector Education and Training Authority
11	FP&MSETA (new)	Fibre Processing Manufacturing Sector Education and Training Authority
12	FIETA	Forestry Industry Sector Education and Training Authority
13	FOODBEV	Food and Beverages Sector Education and Training Authority
14	HPCSA	Health Professions Council of South Africa
15	HWSETA	Health and Welfare Sector Education and Training Authority
16	INSETA	Insurance Sector Education and Training Authority
17	ISETT	Information Technology Sector Education and Training Authority
15	LGSETA	Local Government Sector Education and Training Authority
16	MAPPP	Media, Advertising, Publishing Sector Education and Training Authority
17	MERSETA	Mechanical Engineering and Related Services Sector Education and Training Authority
18	MICT SETA (new)	Media, Information and Communication Technologies Sector Education and Training Authority
19	MQA	Mining Qualifications Authority
20	PAB	Professional Accreditation Body for Health and Skincare
21	PSETA	Public Service Sector Education and Training Authority
22	SABPP	South African Board of People Practices
23	SAICA	South African Institute of Chartered Accountants
24	SANC	South African Nursing Council
25	SAPC	South African Pharmacy Council
24	SASSETA	Safety and Security Sector Education and Training Authority
25	SERVICES	Services Sector Education and Training Authority
26	TETA	Transport Sector Education and Training Authority
27	UMALUSI	Council for Quality Assurance of General and Further Education
28	W&R SETA	Wholesale and Retail Sector Education and Training Authority

10.2 Annexure B

Field of learning	Description
Field 1	AGRICULTURE AND NATURE CONSERVATION Primary Agriculture; Secondary Agriculture; Nature Conservation; Forestry and Wood Technology; Horticulture
Field 2	CULTURE AND ARTS Design Studies; Visual Arts; Performing Arts; Cultural Studies; Music; Sport; Film, Television and Video
Field 3	BUSINESS, COMMERCE AND MANAGEMENT STUDIES Finance, Economics and Accounting; Generic Management; Human Resources; Marketing; Procurement; Office Administration Public Administration Project Management Public Relations
Field 4	COMMUNICATION STUDIES AND LANGUAGE Communication Studies; Information Studies; Language; Literature
Field 5	NSB 05 EDUCATION, TRAINING AND DEVELOPMENT Schooling; Higher Education and Training; Early Childhood Development; Adult Learning
Field 6	MANUFACTURING, ENGINEERING AND TECHNOLOGY Engineering and Related Design; Manufacturing and Assembly; Fabrication and Extraction
Field 7	HUMAN AND SOCIAL STUDIES Environmental Relations; General Social Science; Industrial and Organizational Governance and Human resource Development; People/Human-centred ; Development; Public Policy, Politics and Democratic Citizenship; Religious and Ethical Foundations of Society; Rural and Agrarian Studies; Traditions, History and Legacies; Urban and Regional Studies
Field 8	LAW, MILITARY SCIENCE AND SECURITY Safety in Society; Justice in Society; Sovereignty of the State
Field 9	HEALTH SCIENCES AND SOCIAL SERVICES Preventive Health; Promotive Health and Developmental Services; Curative Health; Rehabilitative Health/Services
Field 10	PHYSICAL, MATHEMATICAL, COMPUTER AND LIFE SCIENCES Mathematical Sciences; Physical Sciences; Life Sciences; Information Technology and Computer Sciences; Earth and Space Sciences; Environmental Sciences
Field 11	SERVICES Hospitality, Tourism, Travel, Gaming and Leisure; Transport, Operations and Logistics; Personal Care; Wholesale and Retail; Consumer Services
Field 12	PHYSICAL PLANNING AND CONSTRUCTION Physical Planning, Design and Management; Building Construction; Civil Engineering Construction; Electrical Infrastructure Construction