GOVERNMENT-LED RESEARCH

What is the impact of government-led education research on policy and practice?

A decade of early grade literacy research in South Africa: Evidence and lessons

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What Works Hub for Global Education

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Abbreviations

ANAs	Annual National Assessments
DBE	Department of Basic Education
DGRI	Directorate General for Research and Innovation
DPIF	Leibniz Institute for Research and Information in Education
DPME	Department of Planning, Monitoring and Evaluation
EEF	Education Endowment Foundation
EFAL	English First Additional Language
EGRP	Early Grade Reading Programme
EGRS	Early Grade Reading Study
EMIS	Education Management Information System
EPR&D	Educational Planning, Research and Development
FLN	Foundational Literacy and Numeracy
IES	Institute of Education Sciences
JET	JET Education Services
JPAL	Abdul Latif Jameel Poverty Action Lab
KRA	Key Responsibility Area
LTSM	Learning and Teaching Support Material
NECT	National Education Collaboration Trust
NEEDU	National Education Evaluation and Development Unit
NEPA	National Education Policy Act
NICPD	National Institute for Curriculum and Professional Development

NIEPR	National Institute for Educational Policy Research
PIRLS	Progress in International Reading Literacy Study
GPLMS	Gauteng Primary Language and Mathematics Strategy
PSRIP	Primary School Reading Improvement Programme
RCMED	Research Coordination, Monitoring and Evaluation Directorate
RCT	Randomized Controlled Trial
RCUP	Reading Catch-Up Programme
RSP	Reading Support Programme
SLP	Structured Learning Programme
SPP	Structured Pedagogical Programme

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Executive summary

This study explores the role and effectiveness of a government-embedded EdLab, examining the Research Coordination, Monitoring and Evaluation Directorate (RCMED) and its coordination of the Early Grade Reading Studies (EGRS) series. Drawing on key stakeholder interviews and document analysis, the study investigates what makes a successful government-led research unit, the lessons from a decade of early grade reading research, and the ways research influences—or fails to influence—policy and practice.

South Africa faces a persistent literacy crisis, with both national and international assessments showing that the vast majority of early-grade learners struggle with foundational reading skills. In response, the Department of Basic Education (DBE), through its RCMED launched the EGRS series in 2014. Over the past decade, the EGRS has generated rigorous, context-specific evidence that structured pedagogical programmes (SPPs)—multi-component interventions that include scripted lesson plans, learner resources, teacher-training, and instructional coaching— can significantly improve learning outcomes in various South African school contexts.

This study examines the RCMED's role as a government-embedded EdLab, highlighting both the advantages and challenges of operating within formal government structures. It reflects on the lessons learnt after a decade of implementing the EGRS series and explores the ways in which the EGRS series has influenced policy, practice and the broader education ecosystem, with the goal of gaining insight into this government-embedded EdLab in practice.

Key findings from the study include:

- **Successful Elements of a Government-Embedded Research Unit:** The RCMED serves as an embedded research hub within government, theoretically offering a more direct pathway from evidence to policy. However, the reality is more complex. While DBE officials broadly support evidence-based policy-making, the RCMED's mandate is not consistently understood across departments, sometimes leading to confusion and tension over roles and responsibilities. While some officials feel the RCMED should prioritise supporting other branches, others emphasise the importance of the Directorate in conducting original experimental research to generate high-quality, contextually relevant evidence. Maintaining independence, while engaging in strategic consultation and collaboration, is critical to maximising the impact and influence of such research.

  The RCMED's ability to deliver responsive, needs-based internal support has been a major factor in its success, often supported by a largely hierarchical relationship between the national and provincial research units. Based on the RCMED experience, successful government-embedded research units require a broad range of capabilities, including technical skills in monitoring, evaluation, and research methodologies; sector-wide knowledge, including education economics and public finance; and soft skills, such as project management and effective communication. Partnerships with universities play an important role in supplementing technical expertise as needed. However, resource constraints—particularly at the provincial level—limit the scope and reach of research activities. The strength of the RCMED's current research team has been central to its

  effectiveness but also presents a potential risk to long-term sustainability and replicability if not maintained.

- **EGRS implementation and evaluation lessons:** The RCMED's commissioning of the Early Grade Reading Study (EGRS) series reflects a strong application of Evidence-Based Practice (EBP) principles, aiming to generate credible, causal evidence to inform systemic literacy reforms. The EGRS series demonstrated that structured pedagogical interventions—specifically scripted lesson plans, learning materials, training, and in- person coaching—can significantly improve early literacy outcomes in South African contexts. However, translating this evidence into large-scale policy and practice revealed limitations of EBP theory in practice. Despite strong evidence, full adoption was constrained by financial, logistical, and political realities. Structured lesson plans were more easily scaled through national programmes like the PSRIP, while resource-intensive coaching models were often adapted or dropped, diminishing impact. Attempts to find scalable alternatives, such as department head or virtual coaching, ultimately proved to be ineffective.

  A complementary constructivist perspective further shows that the uptake of EGRS findings depended heavily on local actors' interpretation, adaptation, and ownership of interventions. Evidence was not implemented uniformly but reshaped through the realities, professional experiences, and resource constraints of teachers, district officials, and subject advisors. Successful adoption was more likely where strong coaching relationships and local ownership existed, while superficial compliance or resistance was common when interventions felt externally imposed. This reinforces that evidence translation is a relational, negotiated process rather than a linear one. The RCMED's experience highlights the need to pair rigorous evidence-generation with strategies that foster iterative learning, adaptation, and engagement across all system levels.

- **Explorations of influence on policy and practice:** While there has not been systematic, standardised adoption of structured pedagogy at a national level, the EGRS series has had a meaningful impact on South Africa's education landscape. It has helped to broaden understanding of the importance of foundational literacy, shifted national conversations around early-grade reading, and contributed to building a larger body of evidence—both locally and internationally—around the efficacy of structured pedagogical interventions. The EGRS informed government-led programmes like the PSRIP. The EGRS also influenced programming in non-governmental organisations—like pilot studies designed by Funda Wande locally and the World Bank's Coach initiatives internationally. Influence has been complex and diffuse, shaping discourse, informing research agendas, and influencing how key stakeholders think about literacy interventions. Perceptions of the influence of EGRS' vary depending on stakeholders' positions, interests, and methodological preferences, with local actors often prioritising contextual relevance and feasibility, and international stakeholders focusing on the rigour of RCTs and alignment with broader trends across the Global South.

  The EGRS series also illustrates the tensions between strong evidence and real-world policy adoption. Coaching, one of the most effective components identified through the course of the studies, has faced major barriers to scale, given financial, institutional and political constraints. Adaptations, such as virtual coaching or training department heads, had more limited impact, highlighting the challenge of scaling up. Overall, the EGRS experience shows that influence is not only a product of rigorous research, but also of stakeholder engagement, trust-building, and negotiation. It underscores the need for future work that combines technical excellence with strategies for systemic change, while continuing to expand the evidence base on how to improve early-grade reading outcomes at scale.

The What Works Hub (WWH) conceptual framework for policy influence was utilised as a lens to examine patterns and pathways from evidence to policy and from policy to practice. The WWH framework helps to highlight the finding that evidence alone does not guarantee policy change. Political priorities, budget constraints, and institutional dynamics significantly mediate the uptake of research into policy and practice. While EBP theories provide a useful starting point, a constructivist lens—recognising relationships, power, and negotiation—more accurately captures how influence operates in practice; from evidence to policy priorities to practice and learning at scale.

The study concludes with the following **key recommendations**:

1. **Institutionalise research integration** into DBE planning and budgeting cycles to ensure sustained, systemic use of evidence.
2. **Design and test scalable intervention models** that respond to systemic resource constraints while maintaining programme integrity.
3. **Secure sustainable financing** by embedding funding for foundational literacy into government budgets, thus reducing dependency on donor funding.
4. **Broaden the RCMED's research focus** beyond early-grade reading to other critical education priorities to enhance relevance and impact.
5. Ensure that key stakeholders understand that **influence is an ongoing, dynamic process,** requiring perseverance, negotiation and collaboration across sectors.

This study affirms that government-embedded EdLabs, like the RCMED, offer significant advantages for linking research to policy and practice, but they do not guarantee a straightforward path from evidence to practice at scale. Success depends on sustained capacity, strategic engagement and an understanding that policy change is a relational, political and iterative process. The experience of the RCMED and the EGRS series provides valuable lessons for those seeking to replicate government-embedded EdLabs and to drive evidence-based reforms in complex education systems.

Chapter 1: Introduction

1.1 Background and problem statement

In recent years, there has been growing recognition of the value of government-embedded education research units, commonly known as EdLabs, and, in this report, referred to as government-embedded EdLabs. These are institutional structures situated within government systems that generate, coordinate, and translate evidence for use in policy and practice. Unlike independent think tanks or research institutes, government-embedded EdLabs operate within government departments, enabling real-time collaboration with policymakers and facilitating evidence uptake. In South Africa, the Research Coordination, Monitoring and Evaluation Directorate (RCMED) within the Department of Basic Education (DBE) can be seen as an embedded EdLab. Since 2014, the RCMED has led the commissioning and coordination of the Early Grade Reading Study (EGRS) series, providing a rich case to examine the potential and limitations of government-embedded research in influencing national education policy.

South Africa has faced a persistent literacy crisis, with the majority of South African learners unable to read for meaning by the end of Grade 3. According to the Progress in International Reading Literacy Study (PIRLS), approximately 81% of Grade 4 learners in South Africa cannot read with understanding in any language, a statistic that highlighted systemic challenges in the foundational learning phase. These challenges include insufficient teacher training, limited instructional resources and pedagogical approaches that do not align with evidence-based literacy practices. This literacy gap has far-reaching implications that are contributing to broader educational inequalities and hindering learners' ability to succeed in subsequent grades and life beyond school. To respond to these challenges, the Early Grade Reading Studies (EGRS) were initiated by the Research Coordination, Monitoring and Evaluation Directorate in the national Department of Basic Education in 2014.

Building on the experiments and findings of the pre-2014 Gauteng Primary Language and Mathematics Strategy (GPLMS) and the Reading Catch-Up Programme (RCUP), the EGRS adopts a randomized control trial (RCT) methodology in large-scale, multi-year experiments. At the heart of the experiment is what has become known as the "triple cocktail": lesson plans, integrated resources and various combinations of teacher training and ongoing support.

EGRS I was implemented in the North West province in 2015-2017 and focused on Setswana Home Language. Findings indicated that school-based coaching for teachers significantly improved reading outcomes, and a second iteration of the study was designed for implementation in Mpumalanga in 2017-2020. EGRS II focused on English as a First Additional Language (EFAL) and compared in-person coaching and paper-based resources to virtual coaching and digital resources. Findings from EGRS II again demonstrated the efficacy of in-person coaching on shifting learning outcomes. Virtual coaching, on the other hand, was ultimately mostly ineffective in impacting change. The results of the study, particularly in Treatment 2 (virtual coaching schools) provided evidence that a focus on EFAL in the early grades crowded out the teaching of the Home Language curriculum and therefore, should not be implemented as a single-focus intervention in the Foundation Phase moving forward.

EGRS II was followed by the Early Grade Reading Programme (EGRP) in North West province in 2020-2023, this time experimenting with one year of professional coaching followed by structured support from the Department Head (DH) for Foundation Phase at the school level versus standard, one-on-one external coaching. Findings from the EGRP showed that DH coaching did not impact change at the classroom level. EGRP II is implemented in the Northern Cape province from 2024-2027, aiming for impact in both monograde

and multigrade classrooms, supporting Home Language and EFAL simultaneously, and operating at scale in a province.

Through multi-year interventions, multiple rounds of data collection and iterative design processes, the RCMED has built a body of evidence around best approaches and practices for improved early-grade reading outcomes, as well as evidence on methods that do not yield positive results. This qualitative research project will examine the effectiveness and influence of the RCMED as a government-embedded EdLab, looking in particular at the case of the EGRS series.

1.2 Purpose of this research

This study has. at its centre, the mandate, approach and operations of the RCMED at the DBE. The functioning and influence of the RCMED are examined through a case study of the Early Grade Reading Study series, which was managed by the Directorate from 2014 to 2024. The main questions that are answered through this research deal with the effectiveness of the RCMED, and with the knowledge produced through the EGRS series.

The study addresses these key research questions:

1. **What creates a successful government-embedded EdLab, and how can it be strengthened or replicated?**
   - Sub-question a: What is the mandate of the RCMED Directorate?
   - Sub-question b: What are the political economy, prioritization, and resourcing considerations for sustaining government-led research initiatives?
2. **What are the unique and replicable lessons learned from 10 years of early-grade reading studies in a developing country context?**
   - Sub-question a: What are the key implementation lessons learned from the design, rollout, and adaptation of early-grade reading interventions?
   - Sub-question b: What are the evaluation lessons learned from conducting rigorous assessments of these interventions, including their impact and scalability?
3. **What has been the influence of these studies?**
   - Sub-question a: What are the direct influences of the EGRS series on policy, teacher training, and classroom practices?
   - Sub-question b: What are the indirect influences and spin-offs, such as shifts in stakeholder attitudes, donor priorities, or the development of related programmes?

1.3 Relevance and significance

This case study contributes to a growing body of work on how governments can use embedded research capacity to improve education systems. The RCMED is an example of a government- embedded education research lab (EdLab), operating from within the Department of Basic Education. As an internal research structure, the RCMED's positioning offers unique opportunities as well as distinct limitations in influencing policy uptake. Unlike external research organisations, EdLabs embedded in government can align closely with planning and implementation cycles, building relationships and credibility over time. However, they must also navigate political sensitivities and shifting institutional priorities.

By examining the RCMED through the lens of an embedded EdLab, this study explores how government-generated evidence is produced, interpreted, and acted upon inside the education system. The case provides

insight into the enabling conditions and constraints for using research to support systemic reform. It also contributes to international discussions on the institutional arrangements most likely to support evidence-informed educational policymaking.

This case study research contributes to a deeper understanding of how government-embedded education research can influence the implementation of large-scale educational interventions and policy. By examining the engagement of various stakeholders—including government departments, implementing organisations, funders and research institutions—the study provides critical insights into the enablers and barriers that determine the influence of research conducted through a government-embedded EdLab.

A key contribution of this research is its alignment with the What Works Hub (WWH) conceptual framework, which provides a dynamic and flexible approach to analysing how research evidence interacts with government policy processes and classroom practice. Rather than outlining a fixed sequence of steps, the WWH framework recognises that influence can begin at any of its four interconnected phases: Efficacy, Efficacy+, Policy Plans and Practice at Scale; and transitions between these may occur in multiple directions. This allows a more realistic understanding of the ways in which research evidence can shape—and be shaped by—education systems.

The WWH framework highlights four interconnected phases in the journey from research evidence to large-scale government-led practice:

- Efficacy – Controlled research studies that demonstrate the effectiveness of specific educational interventions in improving learning outcomes
- Efficacy+ – Research that builds on efficacy studies by testing interventions in different contexts, including government-led delivery, to assess scalability
- Policy Plans – Government-led plans, including policy development, frameworks, regulations, and legislation, aimed at improving learning outcomes
- Practice at Scale – What actually happens in classrooms and education systems when interventions are implemented at scale, which may or may not align with policy and research evidence

The WWH framework is particularly relevant to this study because it helps explain how research evidence moves (or fails to move) from controlled studies to real-world application in government education programmes. By applying this framework, this research examines how evidence from initiatives like the EGRS feeds into policy and implementation decisions. It also explores the role of the RCMED in scaling interventions and ensuring that research findings positively influence education systems.

By reflecting on these dynamics, the study identifies barriers to, and enablers of, the connections between research and policy. The findings will not only inform strategies for improving research coordination within government, but also contribute to broader discussions on how to ensure that education research leads to meaningful and sustainable improvements in learning outcomes.

Chapter 2: Literature review and theoretical frameworks

2.1 Introduction

Purpose and scope of the review

The literature review aims to provide context to the research questions of this study and to assist in interpreting the findings. The purpose of the study is to explore the effectiveness of a government-embedded education research unit in South Africa, called the Research Coordination, Monitoring and Evaluation Directorate in the Department of Basic Education. The effectiveness of this unit is evaluated through a randomized control trial that was managed by this unit over a period of 10 years, the Early Grade Reading Study, 2014-2024.

For the first research question, dealing with the elements of successful government-led research hubs, the literature review does not provide an overview of similar studies or research problems, but rather defines relevant key concepts and sets out comparisons, based on a document review. This is because the case study design does not lend itself to comparison but rather to deeper understanding of what happened in this particular case.

For the second and third research questions, dealing with lessons from the EGRS and an analysis of its direct and indirect influences, the literature review provides an overview of the designs and results of the different iterations of the EGRS. It further highlights key developments in the early- grade research and intervention spaces, both in South Africa and internationally.

The third research question explores the direct and indirect influences of the EGRS on South African reading policy and practices and on the national and international education sectors in general. The pathways of influence are explored against three theoretical frameworks for policy development, which are presented in the literature review.

The literature review is presented in three sections. First, key concepts to this research are defined; second, background is provided to situate the EGRS within the broader literature on early-grade reading research in South Africa and internationally, and third, theoretical frameworks for policy development are presented to guide the interpretation of primary research findings from interviews and a desktop review.

2.2 Key concepts

2.2.1 Policy, practice and policy-making

In this study, education policies are understood as all government decisions that take shape in laws, regulations, guidelines and actions which direct and influence the education system. In the case study of the RCMED, the formulation of new laws is not applicable, but sector regulations,curriculum and teaching guidelines; and teaching and learning products are all seen as aspects of policy.

The conceptual framework of policy influence presented by the What Works Hub (described below in the section on theoretical frameworks) includes in the notion of policy also educational practices at scale. These practices could be led by the government, or simply occur within government regulatory frameworks. For the exploration of pathways to policy influence, this study will include widespread educational practices in the definition of policies and policy products.

Policymaking is understood as the formulation and implementation of these policy components, and, as such, policymakers include a wide range of officials within the DBE. In addition to those who write regulations and guidelines and develop education products, policymakers are all officials who design and implement

programmes and provide expert advice to implementers, including teachers. Policy-related practices may be shaped by teachers, interventions, funders and researchers who are doing work to promote reading at substantial scale.

2.2.2 Government-embedded research unit

For the purposes of this study, a government-led research unit is situated within a government department, in this case the Department of Basic Education. The mandate, priorities and action plan of the unit are all determined, or at least guided, by government officials. Most of the work done by this unit will be by government officials, but some of its tasks and, specifically, research operations may be outsourced and externally funded. The requirement is only that the work is guided and approved by government officials. A research unit like this may be situated in a larger strategic planning or similar unit, and it may have other functions in addition to research, such as monitoring, evaluation and research coordination. Such a government-embedded research unit is similar to what has become known as an EdLab, described below.

2.2.3 Education evidence labs

Education evidence labs, also called EdLabs, are mechanisms, platforms or institutions that aim to bridge the gap between research and policy making by institutionalising evidence use in education systems. The Jacobs Foundation has defined EdLabs as partnerships between governments, researchers, and practitioners to generate, synthesise, and integrate evidence into education policy and practice. However, EdLabs is an evolving concept, and therefore, it is not possible to clearly define its nature and purpose. (Hayter & Morales, 2023.)

One major contribution of EdLabs is their role in collecting and analysing education data and evidence, for example student performance data, formative assessments, and classroom observations, which can be continuously analysed to inform curriculum adjustments and instructional strategies (Burn, 2023). EdLabs in countries such as Ghana and Côte d'Ivoire, are exploring how longitudinal learning assessments can inform national reading policies (Jacobs Foundation, 2023). As an example, by linking EdLabs with education management information systems (EMIS), countries can track literacy progress in real-time and make evidence-based adjustments to reading programmes.

EdLabs can also provide a space for experimentation and evaluation; for example, around effective instructional strategies. While studies have shown that teacher-coaching models have a more significant impact on reading outcomes than traditional teacher-training workshops (Kim et al., 2019), EdLabs can further test different professional development approaches, identifying effective coaching strategies and scaling successful models.

EdLabs can promote better educational outcomes by generating, synthesising, and presenting high-quality evidence to shape practices and policy decisions. However, for their impact to be fully realised, significant efforts are needed to mitigate political and bureaucratic barriers to evidence uptake, possibly by integrating EdLabs into government education systems, called an "embedded" EdLab. There is an ongoing debate on the relative effectiveness of embedded Edlabs compared to EdLabs that are independent and external to the government.

2.3 Situating the EGRS series: Research on early-grade reading instruction

Early-grade reading instruction is crucial for laying the foundation for academic success and lifelong learning. Globally, there is a growing consensus around the importance of foundational literacy and numeracy (FLN) in achieving educational equity and improving long-term learning outcomes. Despite extensive investment in education reform, large-scale interventions have often struggled to impact learning outcomes significantly (World Bank, 2019). However, structured pedagogical programmes (SPPs), also referred to as structured learning programmes (SLPs)— interventions with multiple, aligned components aimed at shifting teachers' instructional practices—have shown success in improving learning outcomes, particularly in low- and middle-income country contexts (LMICs) (Conn, 2014; Glewwe & Muralidharan, 2015; Murnane & Ganimian, 2014; Snilstveit et al., 2016; Evans & Popova, 2016). South Africa's Early Grade Reading Study (EGRS) series is a key contribution to this evidence base, building on earlier interventions and providing rigorous data on "what works" in the South African context for improving literacy outcomes at scale.

The promise of structured learning for large-scale change

Efforts to improve learning outcomes have highlighted the challenges of achieving systemic change at scale. Research on educational change in LMICs has shown that input-driven approaches, such as providing teaching and learning materials in isolation, generally fail to yield significant improvements in learning outcomes on their own (Hofmeyr, 2019; Piper et al., 2018; Snilstveit et al., 2016; Sabarwal, Evans, & Marshak, 2014). In contrast, SPPs are designed to help teachers change their instructional practices in the classroom. These programmes integrate structured lesson plans, aligned resources for learners, ongoing training, and coaching to support teachers through the complex processes of instructional change.

At this point, there are a variety of SPPs that have shown significant results in different LMIC contexts. The Kenya Primary Math and Reading Initiative (PRIMR) pilot and its scaled-up successor Tusome is perhaps the most widely cited example. Tusome serves as a particularly significant case because it was scaled nationwide and showed significant learning gains at scale (Piper et al., 2018). Teaching at the Right Level (TaRL), which was pioneered in India by Pratham, and has since been adapted in multiple contexts, including Botswana and Nigeria (Banerjee et al., 2017) shares the core principles with SPPs, particularly in its structured approach to improving foundational literacy and numeracy. While TaRL differs in that it groups children by skill level rather than grade and often occurs outside of formal schooling times, it incorporates key elements of structured pedagogy: it provides teachers with targeted instructional strategies, simple assessment tools, sequenced learning activities, and ongoing support to ensure effective implementation. More recently, the Luminos Fund's accelerated learning model has also shown positive results, using phonics-based instruction to rapidly improve literacy outcomes. A recent RCT conducted in 100 communities across Liberia showed large effects for both literacy and numeracy skills for children who had never been in school (McManus et al., 2024). These studies highlight the critical role of structured instructional support in improving early-grade reading outcomes, a finding that echoes South Africa's experience with the EGRS series.

The evolution of structured learning in South Africa

Prior to 2014, South Africa's large-scale efforts to improve foundational learning were limited, with little rigorous evidence on what worked. The Gauteng Primary Language and Mathematics Strategy (GPLMS) (2010–2014) was one of the first significant attempts to evaluate the impact of structured learning programmes at scale. Implemented in 1,000 no-fee primary schools, the GPLMS provided teachers with scripted lesson plans, instructional materials, training, and coaching – what Fleisch (2016) has termed the "triple cocktail". Although the GPLMS was not an RCT, a regression discontinuity design (RDD) analysis found significant

learning gains, demonstrating the potential for success with structured learning programmes in the South African context.

Building on lessons learned from the GPLMS, the Reading Catch-Up Programme (RCUP) was designed as a randomized controlled trial (RCT) to test a streamlined version of the GPLMS model. The intervention aimed to improve English First Additional Language (EFAL) outcomes in Grade 4 classrooms by providing targeted instructional support (Fleisch, 2017). While some improvements were observed in the intervention group, the gains were not statistically significant when compared to the control group, underscoring the value of RCTs in rigorously assessing educational interventions (Fleisch & Schoer, 2018).

The RCUP findings highlighted that, by Grade 4, many learners struggled with the nationally prescribed curriculum and learning materials, which were often beyond their proficiency level (Taylor et al., 2017; Spaull & Pretorius, 2019). This reinforced the importance of strengthening foundational literacy skills in the early grades to prevent later learning gaps, aligning with broader evidence on the need for early interventions in literacy (Piper et al., 2018; Pretorius & Spaull, 2016). These insights helped pave the way for the Early Grade Reading Study (EGRS) series, which sought to evaluate structured learning interventions more rigorously and at a larger scale (EGRS Research Team, 2019).

The Early Grade Reading Study (EGRS) series

The first Early Grade Reading Study (EGRS I) (2014–2016) was South Africa's largest RCT in education at the time. Conducted in the North West province with 230 schools, the study tested three intervention models for improving Home Language (Setswana) learning outcomes: (1) a full "triple cocktail: approach with coaching, (2) lesson plans and materials without coaching, and (3) a parental involvement model (Cilliers et al., 2020). The results demonstrated that one-on-one instructional coaching was a key determinant of success, with learners in coached classrooms achieving significantly higher reading gains – equivalent to an additional third to half a year of schooling compared to the control group (Cilliers et al., 2020; Fleisch & Alsofrom, 2022).

The EGRS II (2016–2019), an EFAL intervention conducted in 180 schools in Mpumalanga, aimed to test the replicability of the basic 'triple cocktail' model in different South African contexts while also expanding on this research by testing the effectiveness of virtual coaching as a lower- cost alternative to face-to-face coaching (Kotze, Fleisch & Taylor, 2019). While the structured learning intervention remained effective for classrooms receiving in-person coaching, findings indicated that learning was not positively impacted in classrooms receiving virtual coaching (Cillliers et al., 2022). This finding reinforced the importance of in-person instructional support in addition to the structured learning materials and ongoing training components (Fleisch & Alsofrom, 2022).

Because in-person coaching is expensive and difficult to implement at scale, the subsequent Early Grade Reading Project (EGRP) (2019–2023) sought to test an alternative model of in-person coaching. The EGRP investigated whether coaching departmental heads (DHs) at each school to support teachers could be an effective alternative to external coaches. Unfortunately, the results showed that DH-led coaching did not yield significant improvements in classrooms (EGRP Evaluation Summary Report, 2024), once again emphasising the importance of in-person coaching as one component of a successful SPP – at least in the South African context. The ongoing EGRP II in the Northern Cape province (2024-present) aims to test the efficacy of SPPs in multi-grade classrooms, and to again trial training DHs to serve as instructional coaches in their schools.

Related Studies in South Africa

A variety of other studies conducted in South Africa have reinforced the findings of the EGRS in different ways. Funda Wande, an NGO conducting research on structured pedagogy to improve early literacy and numeracy outcomes in South African classrooms, has similarly shown that a "triple cocktail" model can be effective in improving learning outcomes. In the organisation's pilot intervention in the Eastern Cape province, for example, Grade 1 learners demonstrated reading improvements equivalent to an additional one-third of a year of schooling (Ardington & Meiring, 2020). Funda Wande has also experimented with alternative models of the teacher support component. The organisation conducted an RCT in Limpopo province using teaching assistants to provide in-classroom support to teachers. The findings suggest that supplementing teacher-led instruction with additional human resources can be an effective strategy for improving learning outcomes (Ardington & Meiring, 2020). The findings also suggest that alternatives to external coaching can be effective.

On the other hand, certain studies have shown negative results, reinforcing key findings from the EGRS series. For example, the Zenex Literacy Project (Zenlit) study, conducted in 21 schools across the Eastern Cape, KZN and the Western Cape provinces from 2014 to 2017, demonstrated that coaching alone without accompanying structured learning materials had limited effectiveness in helping teachers shift their instructional practices (Hofmeyr, 2019). This reinforces the utility of the multi-component "triple cocktail" approach. Despite the fact that coaching is shown to be a critical element of shifting learning outcomes in the EGRS studies, the Zenlit case shows that it is coaching in the context of an SPP that is impactful – not simply coaching on its own.

Recently, Stern et al. (2023) evaluated the long-term impacts of the EGRS I intervention. The study tracked a cohort of learners over seven years, from Grade 1 in 2015 through Grade 7 in 2021 – 4 years post-intervention. Learners in this cohort demonstrated sustained gains in oral reading fluency over time, enhanced written comprehension skills in both Home Language (Setswana) and in English, and improved grade progression, suggesting a potential reduction in dropout rates (Stern et al., 2023). Importantly, this study suggests that the positive effects of studies like the EGRS I are not limited to the duration of the intervention, but have the potential to endure.

EdLabs, the EGRS series, SPPs and Policy

The emergence of EdLabs has created opportunities to bridge the gap between research and policy, strengthening the institutionalisation of evidence-based decision-making in education. By generating and synthesising insights, EdLabs provide a framework for informing intervention design, teacher support strategies, and broader education reforms. However, their ultimate effectiveness depends on their ability to translate research findings into sustainable, large-scale change. The present study examines the RCMED as a case of a government-embedded EdLab, using the EGRS series to assess its role in shaping policy and practice in South Africa over the last ten years.

While structured pedagogical programmes, such as the EGRS interventions have been rigorously evaluated for their impact on learning outcomes, there has been limited investigation into how such evidence informs policy shifts and learning within formal education systems. By examining the trajectory of EGRS findings – both in their direct influence on literacy interventions and their broader impact on the sector – this study seeks to provide insights into how research can drive meaningful and lasting change in education systems. Situating the EGRS series within the broader landscape of education evidence generation, this study aims to expose some of the conditions necessary for research to inform large-scale educational change.

2.4 Theoretical frameworks

Three theoretical frameworks are used to interpret the findings in this study. The Evidence-based Policy Development Theory is used to frame the linear view of evidence leading straight to policy change, which is a good starting point when RCTs are used and which is also inherent to many views on the advantages of government-embedded EdLabs. Some documented critiques of the

EBP theory are equally well illustrated by certain findings. These shortcomings of EBP theory lead the way to the constructivist theory of policy development, which is used to explain some of the non-linear pathways to policy influence and some of the blockages that prevent the flow of evidence to formal policy. The conceptual framework of policy influence, as developed by the What Works Hub for Global Education at Oxford University, is useful in identifying the variety of iterative pathways between evidence, policy and practice. In this study, the two theories of policy development complement the framework as a way to explain the directions and momentum of the flow between the four phases.

2.4.1 Evidence-based policy development theory

The selection of an evidence-based policy development framework for the interpretation of primary data in this study is based on the decision of the RCMED in 2014 to do a randomized- controlled-trial experiment in order to develop evidence-based policies for the teaching of reading in the early grades. This decision indicates an underlying theory of change that is well represented by Evidence-based Policy (EBP) development theory. EBP theory assumes a linear, common sense logic of policy development, where collecting and analysing evidence on a certain problem would lead to policy decisions based on scientifically proven effective methods (Marston & Watts, 2003). Archie Cochrane's vision for medical policy, as set out in his 1972 book, *Effectiveness and Efficiency: Random Reflections on Health Services*, still provides a good basic concept of the EBP ideal: that ineffective policies would be abandoned in favour of policies based on scientific evidence of effectiveness. Such evidence should come from a review of multiple outcome-based evaluations, preferably randomized-controlled trials. (Oliver et al., 2014; Marston & Watts, 2003).

Oliver at al. (2014) conducted a useful comparison of three systematic reviews of literature on EBP theory and identified common themes on the factors that facilitate or block the use of evidence in policy. Facilitators of EBP were identified as close relationships between researchers and policy-makers, clear communication of high quality research findings, and the relevance and timing of research as it relates to the policymaking process. The findings in this study show that some of these facilitators are present in the case of the RCMED, while others are somewhat lacking.

In Oliver et al's review (2014), common barriers to EBP were identified as a lack of clear, relevant and timely research evidence, a contact-gap, or even mutual mistrust between researchers and policymakers, and a lack of research skills among policymakers. Again, a few of these barriers are illustrated by the results of this study. The review further identified the lack of information on the cost of implementing new evidence-based policies as another barrier to EBP. Here too, the EGRS series responds well to the theory, since a cost analysis for the use of teacher coaches was conducted to promote the uptake of evidence into policy. Howlett (2009) elaborates on the barriers to EBP presented by the lack of research skills among policymakers. In the context of Canada, he suggests that even an advanced country lacks the "human, financial, network and knowledge resources" for managing and implementing EBP (p. 155), adding that evidence is only one factor in the policy development process and that any of a range of other hurdles may prevent the development of EBP. Howlett's point may explain one of the barriers to policy influence present in this study.

Oliver et al. also identify three assumptions that underpin the expectation that new evidence, such as produced by the EGRS, should influence policy: one, that there is a policy-evidence gap; two, that current policy is not based on evidence; and three, that more evidence would lead to better policy. In the case of South Africa, the overwhelming evidence of poor reading outcomes is stacked against current policies and practices, which is precisely why the EGRS experiment was started in the first place.

While the findings demonstrate multiple ways in which the EGRS has impacted on, and influenced, the sector, the appealing logic of EBP does not fully account for the realities of policy development, as it begs the question why the EGRS findings and recommendations have not found their way into formal policy and implementation at scale.

Critiques of EBP theory summarised by Marston and Watts (2003) posit that the very definition of what constitutes evidence is contentious, and EBP, as it relies on scientific evidence, may give undue strategic control to policy elites and in the process disregard "tacit forms of knowledge", such as "practice-based wisdom, professional judgement and the voices of ordinary citizens" (p. 158). Marston and Watts add their voices to other writers by further arguing that the scientific approach to EBP that works in the medical field, should not be expected to work as well in the field of social services policy because of an over-reliance on objective scientific criteria (p. 159).

It is clear that EBP theory may not fully explain the evidence-to-policy-and-practice pathways observed in the present case. Another theoretical framework is therefore needed to explore the pathways of direct and indirect policy influences as a result of the EGRS findings. The constructivist theory of policy influence goes some way towards identifying and explaining factors other than scientific evidence that may influence policy development.

2.4.2 Constructivist theory of policy development

Constructivist theory explores how cognitive frames other than scientific evidence and cost- benefit analysis, identify policy problems and solutions, and how this is linked to political, historical, institutional and territorial contexts (Saurugger, 2018). This theory posits that ideational factors, like world views, ideas, collective understandings, norms and values determine political action, and not only material and rational choice approaches. It further proposes that a collective logic of appropriateness determines how to behave correctly in the policy-making process, rather than cost-benefit analysis (p. 20).

The constructivist theory of policy influence can be useful in examining how the social construction of reality influences policymaking. Someone's values or perceptions of what is desirable may affect how they view and interpret policy proposals, even if these are based on empirical evidence. In addition, the discourse within which evidence and subsequent policy proposals are talked about may influence how these are received and interpreted. Furthermore, a government official's professional identity and group identity, such as political affiliation, may influence their policymaking thoughts and processes. Finally, constructivist theory examines how certain problems are framed as important policy priorities and this framing may influence the policymaking process.

The constructivist theory could be helpful in understanding how the pathways of influence are shaped by the identities and ideas of the actors in the policy space, and by the trust and relationships between them. In this study, these elements illuminate some of the political factors identified which impact on policy development within the DBE branches and provinces. It also explains some of the relational factors in the education networks in South Africa that may be impacting on the appetite for evidence produced by the EGRS.

2.4.3 The What Works Hub conceptual framework of policy influence

As discussed in the introduction to this report, the What Works Hub (WWH) for Global Education works through partnerships to understand how to implement education reforms at scale. As one such partnership, this research contributes to lessons on how evidence of effective interventions, generated through controlled studies, can influence policy and practice through different pathways. To analyse these pathways, it is useful to view the findings through the WWH conceptual framework of policy influence.

The WWH framework comprises four interconnected and non-linear phases: Efficacy, Efficacy+, Policy Plans and Practice at Scale. These do not follow a prescribed sequence. Interventions and studies may enter or progress at different points, and movements between the phases may occur in various directions, reflecting the complexity and diversity of real-world education systems. The framework accommodates both formal and informal routes of influence, where evidence, planning, and implementation may interact in iterative or parallel ways. Each phase in the framework represents a critical dimension of the policy influence process:

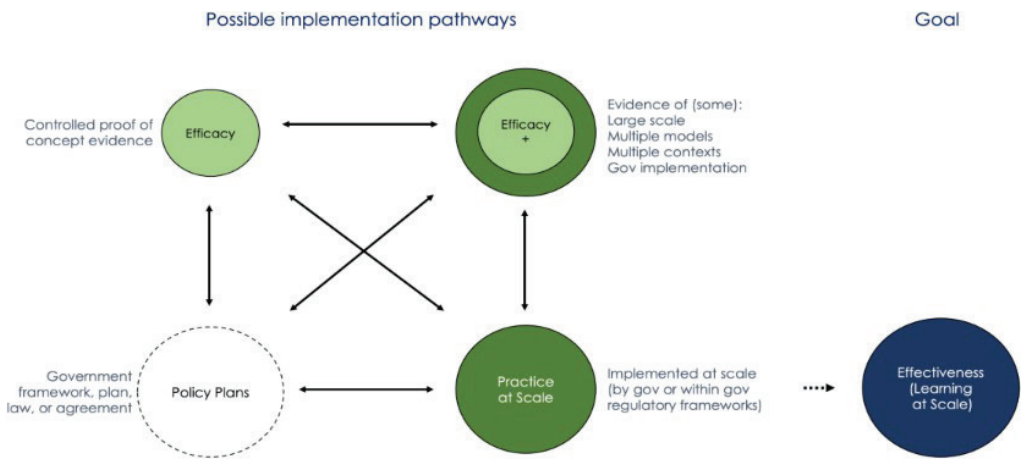

Figure 1: WWH Conceptual Framework.

Efficacy: The body of existing evidence from controlled studies showing the efficacy of certain interventions in achieving better learning outcomes. An example would be early studies of targeted instruction (where children are taught on the basis of their understanding, rather than what is prescribed for their age), which showed that it improved learning outcomes.

Efficacy+: The body of evidence where the efficacy of such learning interventions has been shown in different contexts and settings, including through government delivery, thus growing the body of evidence that such interventions could be scaled up, and 'pressure testing' that evidence. An example would be the studies of targeted instruction that have been undertaken in different countries and by government-funded teachers, and still shown results.

Policy plans: This phase includes formal government planning efforts, ranging from conceptual proposals and drafted frameworks to adopted policies and regulations. These plans aim to institutionalise learning gains identified through research.

Practice at scale: What is actually happening in education systems and in large numbers of individual classrooms. This may or may not reflect the best evidence, and may or may not reflect government policy.

The various phases are interrelated through different possibilities, as indicated by the two-way arrows connecting each phase with the others. Below are reflective questions aligned to each possible pathway, consistent with the WWH framework:

1. **Flow from 'efficacy' phase:**

To efficacy+: How do controlled studies get repeated or scaled up across different places and in different models by researchers and/or by governments?

To policy plans: How does evidence from controlled studies feed into government policymaking? What are the barriers to government policymaking being evidence-based?

To practice at scale: Sometimes, teachers will pick up on studies and put these ideas into practice in the classroom, leapfrogging the process of these ideas becoming government policy. Under what circumstances does this happen, and is it an effective implementation route?

2. **Flow from 'efficacy+' phase:**

To policy plans: How does the pressure-tested evidence represented in the Efficacy+ circle feed into government policymaking?

To practice at scale: Sometimes, teachers will pick up this pressure-tested evidence and put the proven ideas into practice in the classroom, leapfrogging government policy. Under what circumstances does this happen, and is it an effective implementation route?

3. **Flow from 'policy plans' phase:**

To practice at scale: How do government plans and actions (evidence-based or otherwise) actually get put into practice in hundreds of classrooms – and when they don't, what has gone wrong? What are the most effective implementation routes or models?

To efficacy/efficacy+: Governments may commission or generate their own efficacy evidence as part of the policymaking process.

4. **Flow from 'practice at scale' phase:**

To efficacy/ efficacy+: Does what is happening in practice feed back into the body of available evidence about education? How is evidence captured and used to refine interventions?

To policy plans: Does what's actually happening in classrooms feed back into policy plans, and how?

The WWH Conceptual Framework provides a valuable lens for observing the findings that illustrate the movement between evidence, practices and policies emanating from the EGRS. It assists in evaluating influence and impact of evidence by identifying different phases in the process of developing practices and policies, and more evidence.

2.5 Conclusion

The literature review provides useful contextual information and theoretical frameworks for interpreting the findings of this study. It defines the key concepts of policy, practice and policymakers, describes government-led research hubs, and provides illuminating details on EdLabs. An overview of the EGRS series provides important background information to the analysis of how evidence from these studies has impacted the sector, and three theoretical frameworks provide tools for understanding these pathways to influence, as presented in the Discussion chapter.

Chapter 3: Methodology

This research employed a qualitative research approach complemented by a desktop review.

Information obtained from the document review assisted researchers to familiarise themselves with the programme and to design and refine interview questions.
The list of documents reviewed is included in Appendix 1.

To guide the interviews, seven semi-structured interview tools were developed, tailored to the diverse stakeholders groups but with significant overlap to ensure consistency. These tools were piloted with the respondents from the RCMED, who provided written feedback after their interviews.

Interviewee sample selection

A series of key stakeholder interviews were conducted with individuals selected based on their roles and contributions related to the RCMED and the EGRS. Different stakeholder groups include:

- From government:
  Research Coordination, Monitoring and Evaluation Directorate (RCMED) Various Branches in the National Department of Basic Education
  Department of Planning, Monitoring and Evaluation (DPME) in the Presidency of South Africa
  Research and strategic planning units of three selected provincial DBEs
- EGRS implementing organisations
- Education development funders
- Local and international research institutions.

From mid-August to the end of November 2024, a total of 32 stakeholders were interviewed, with the majority of interviews conducted virtually. The distribution of stakeholders across these categories is shown in Figure 2 below, which highlights the balance of representation among the various organisations.

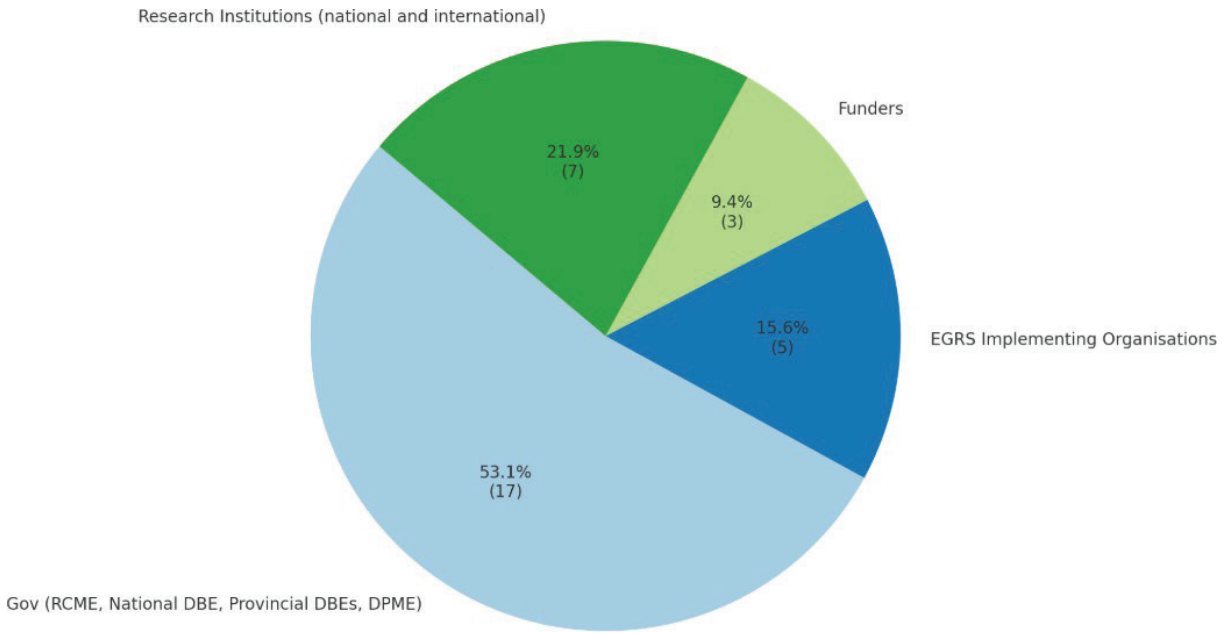

Figure 2: Representation of Key Stakeholders by Organisation

The chart illustrates the proportional representation of stakeholders interviewed in this study. Out of a total of 32 stakeholders interviewed, the government category (including the RCMED, National DBE, Provincial DBEs, and DPME) accounted for 53% (17 stakeholders), reflecting the study's central role in education policy and research. Research institutions (national and international) make up 22% (7 stakeholders), demonstrating the study's strong research orientation. Other key groups include EGRS implementing organisations (16%, 5 stakeholders) and funders (9%, 3 stakeholders).

Limitations of the study

- This research focused on three of the nine provinces, which may not fully capture the diversity of experiences and challenges across South Africa's education system. Findings cannot be generalised to provinces or districts with different socio-economic or linguistic profiles.
- While the study aimed to examine the influence of EGRS findings on policy, it did not fully map all the pathways of policy adoption at the national and provincial levels, nor did it systematically analyse all the systemic barriers to implementation.
- The research offers a snapshot of past implementation and influence but does not address the long-term sustainability of the RCMED's role or the continued impact of the EGRS series on literacy practices and outcomes.
- Conducting interviews and gathering data from geographically dispersed stakeholders presented challenges, particularly where virtual interviews may have limited the richness of responses compared to in-person interactions.
- Much of the data presented in this report relied on self-reported perspectives from stakeholders, which may have introduced biases, such as overestimating successes or underreporting challenges in the implementation of EGRS findings. In as much as this is a limitation, it is also deliberate and part of the design to find out the intangible pathways that depend on people's subjective opinions and views.

Chapter 4: Research Findings

4.1 Introduction

This section presents the empirical findings from thirty-four semi-structured, qualitative interviews with key stakeholders, as well as a document review, in service of exploring the study's key research questions:

1. What creates a successful government-embedded research hub, or EdLab, and how can it be strengthened or replicated?
2. What are the unique and replicable lessons learned from 10 years of early-grade reading studies in a developing country context?
3. What has been the influence of these studies?

This chapter is organised by these research questions. Firstly, the chapter outlines and assesses the organisational and functional aspects of the RCMED, its authority, and functions within the DBE. Next, the chapter outlines perceptions around the key implementation and evaluation lessons learnt from the EGRS series, highlighting structured pedagogy, teacher coaching, and lesson plans in enhancing early-grade literacy. Finally, the chapter explores the impact and influence of the EGRS series, both in South Africa and internationally.

4.2 What creates a successful government-embedded education research hub and how can it be strengthened or replicated?

The findings in this section firstly illustrate general views on evidence-based policy among government officials. The perceptions and understanding of the mandate of the RCMED is then presented in some detail to demonstrate how these views held by officials of the DBE shape their attitudes towards the evidence produced by the EGRS, and ultimately whether they allow this evidence to influence their own policy decisions. The relationship between the national and provincial research units is explored, as well as the functionality of the provincial units. Respondents' views on the measures of success for the RCMED are presented along with a summary of the conditions for success and replicability of such a unit.

4.2.1 The importance of research in government and policy development

This section explores what value government education officials place on research and evidence when it comes to the role of government and to policy development. This lies at the foundation of understanding how research generated by the RCMED may be perceived and used, or not.

All respondents from the national DBE emphasised the importance of creating policies that are evidence-based, and of evaluating the effectiveness of policies as they are implemented. Respondents distinguished between the roles of the national and provincial education departments, noting that the national DBE is distinctly responsible for policy development, while the provinces are focused on implementation. As one person from the national department said: "We get immersed in policy. We're not a province where the textbooks don't turn up at school again, so you run around for two weeks making sure that the textbooks get there."

Respondents linked policy development at the national level with the responsibility to do research, monitoring and evaluation. Some respondents clearly identified the RCMED as the source of data for policy development. For example, one official passionately discussed the need for a dedicated unit like the RCMED:

I think research plays a very critical role in Government and in the Department of Basic Education, in a sense that it's a way of determining whether certain programmes are working, whether interventions or programmes that are being implemented are producing any results. Are they impactful? And I think it's also some kind of a study to identify where the gaps could be and where the strengths of that particular programme may be, so that if any programme has to be replicated and implemented elsewhere, all of the lessons learned from research can then be incorporated to ensure that, you know, challenges that we have encountered, you know, are addressed before the programme can be replicated and implemented elsewhere. So, research, I think it's very important, and equally important is monitoring and evaluation, because monitoring and evaluation is a way of measuring of actually, you know, tracking what it is that you are implementing and measuring the effectiveness thereof. So, I think the Department of Basic Education benefits greatly from the Research [Co-ordination], Monitoring and Evaluation Directorate.

Another respondent discussed the impact of the RCMED, reflecting, "I saw the benefit of research, getting to know about the latest in terms of the practice of teaching, the latest in terms of curriculum reviews, curriculum transformation. So, that's how I came to be attached to the issue of the research unit". In other words, it was the RCMED that helped this respondent learn to value evidence for policy.

On the other hand, some respondents indicated that research and monitoring and evaluation were the responsibility of all branches within the DBE, not just the RCMED.. For example, this DBE official sees it as everyone's responsibility: "If you sit here at National, in a sense your job is to think about research, to think about evidence, because we do policymaking". And another: "At the heart of evidence-based policy for me is the

actual evidence of what happens in practice".

Finally, while government officials generally spoke of the importance of evidence, one person's view was that all national DBE officials had to be ready to counter political policy decisions with evidence, because evidence isn't always valued. This respondent argued, "Ministers generally don't make decisions based on evidence. They make decisions based on who's in their ear, who wrote what in the paper, who did what… You know, those are the things that they use. And often it's up to us as the bureaucrats to go back and say, no, you actually can't do that. You know, that's a mistake". This points to a tension when it comes to the value of evidence for policy and practice.

4.2.2 The origin and mandate of the RCMED

Respondents were asked what they knew about the origin and mandate of the RCMED. The answers varied significantly; those within the RCMED described their mandate as set out in laws and policies, and as regulated by the DPME. On the other hand, other DBE and provincial officials typically shared their personal opinions regarding the RCMED's mandate. The differences expressed showcase that the mandate of the unit is contentious, which is significant here because these varying perceptions may ultimately impact how the evidence produced by the unit is perceived and used by others within government. In other words, how people view the RCMED's origin and mandate may affect the pathways from evidence to policy influence and practice on the ground (or practice at scale). It further illustrates that an embedded research unit will always have other bureaucratic tasks to fulfill in addition to experimental research.

Exactly why and how the RCMED was set up is not clear. While all respondents framed the establishment of the unit as a response to the need for more evidence to inform policies in the sector, the origin of the RCMED was described differently based on respondents' view of the place and relevance of the unit. For example, one person dated the origin of the unit back to the first democratic Minister of Education in 1996, while another person credited the leadership of a later minister along with her Director-General (2009-2024). Another person recalled 2010 as the founding of the unit, when there was a positive political climate for evidence-based policy at the national education department and at research institutions. Other respondents described the establishment of the RCMED as a gradual and organic process rather than having a formal start date.

In terms of the RCMED's mandate, those within the unit referenced the National Education Policy Act when describing their mandate, which "instructs the government to do the function of research, monitoring and evaluation". Another member of the RCMED expanded on this definition, noting, "The conceptualisation of national offices like DBE initially was less [about] implementing actual things and more monitoring, like you set the policy and then you monitor whether that policy is being implemented, and if not, why not, and how can you strengthen that?"

In the interviews conducted for this study, the RCMED members clearly described the unit's mandate along five key responsibility areas: 1) branch support; 2) medium-to-long-term sector monitoring; 3) coordinating research, monitoring and evaluation activities in the sector; 4) undertaking research, monitoring and evaluation; and 5) national and international reporting. To illustrate the unit's alignment to their mandate, an operational plan for the 2023/24 financial year was provided. This served as an example of tasks performed in each of these areas in a typical cycle. The plan presents four to eight sub-tasks for each of the five responsibility areas, and this list forms a useful reference point for the range of tasks performed by the RCMED in delivering on its official mandate.[2] Additionally, the unit provided a selection of concrete outputs produced for key responsibility areas in the period 2014-2024, coinciding with the EGRS.[3] This information provides a useful reference point for perceptions expressed by DBE respondents outside of the unit, who said, "the unit has spent the last 10 years focusing on one area of our work only", referring to work related to early-grade reading.

While those within the RCMED tended to cite policy when describing their mandate, the views from other DBE and provincial officials on the unit's mandate tended to be based on perceptions and opinions; they often did not reflect the actual mandate. A level of frustration was evident among many respondents due to the perception that the RCMED freely decides what to focus on, rather than delivering on a specific mandate. Criticism from those within the DBE also focused on some confusion and perceived duplication of the responsibilities of different units in the DBE, which are all responsible for research and evaluation in some way:

I think there is one for research in the Institute in Branch T. Remember, there's this thing called the NICPD (National Institute for Curriculum and Professional Development) where they created a teacher's institute for curriculum and teacher development. And the intention was always that they would have some research capacity to support both teacher development and curriculum, but that they would also ultimately be responsible for coordinating all teacher development interventions around the country. And then there's a unit in Branch C and their role is more to coordinate, like international, what do you call this, like the PIRLS, TIMMS, SAQMEC, and all of that sits in the Assessment Directorate and not under the RCMED, you see, and that's maybe a criticism that you can have as well, that actually we have three research units in the department.

Despite this criticism, other interviewees praised the unit for providing services that are not necessarily articulated in their mandate or operational plan. One of the positive reflections on the work of the RCMED from within the DBE refers to their internal advisory role:

They play an excellent role. They don't only coordinate. They are a sounding board to the department on any research that's carried out, outside of the work that we do. I refer any piece of research to them for validation but also for verification, because you'll find everyone doing research out there, but you need expertise to advise you on any piece of research that you come across or that is brought to your attention. Then you have expertise resident in the department, people who know the research agenda of the department, people who understand the sector and who are best placed to advise us in terms of any research work that is done outside, or even research work that is done elsewhere in the world. You're able to say, can you please just take a dive into this and advise as to whether there's anything that we could consider for implementation?

[1]Finally, respondents offered suggestions for what the RCMED should be doing, which were not necessarily positive or negative, but which showcased the general lack of understanding of the mandate. For example, one DBE official recognised the various units doing types of research and evaluation and thought that the RCMED should promote synergies and collaboration between these different units and sections in the DBE:

Whatever work you do with curriculum, you know it also needs to filter through to other units and Branches. For example, Teacher Development, if they pick up any gaps in their research monitoring and evaluation, and these gaps have a lot to do with how teachers are trained at universities, so they also need to work with colleagues in Teacher Development, in as much as they work with us in curriculum. So, you know, their function is very transversal; they cut across the different units and Branches. And for that reason, I would say that perhaps it would be useful if they could have dedicated researchers, you know, that work directly with other units, for example, Teacher Development, with Curriculum, with NEEDU as well.

The views on what the mandate and function of the RCMED should be within the Department reflect a rather inward-looking perspective from officials. They want someone to bring coherence to the work of different branches, which may be needed but which does not relate to monitoring, evaluation and research. No one inside the DBE suggested that the unit should be doing experimental research to address binding constraints in the sector. This may reflect a bureaucratic mindset, or a limited understanding of what evidence-based policy is.

1 [2] To view the operational plan, reference Appendix 2.

[3] To view this list, reference Appendix 3.

It is true that a government-embedded EdLab will have many other responsibilities and tasks to deliver than just doing original research. The following reflections on the mandate of the RCMED are grouped as they relate to the official key responsibility areas (KRA's), and indeed all of them but one relate to administrative and bureaucratic requirements. The views from the department about how well the unit is doing in the different areas, and whether they should be doing these tasks at all, serves to illustrate the value the unit has for their internal clients. This impacts on the openness of policymakers to experimental evidence from the RCMED.

Mandate KRA 1: Branch support

Most respondents from the branches described "branch support" as the RCMED helping the branches with their monitoring and reporting responsibilities. Some tension exists around where the responsibility for monitoring and evaluation sits exactly, and some were not happy with the way the RCMED responded to their needs, while the officials in the unit felt that they did about as much as they could with their current capacity.

The RCMED described this responsibility as "supporting the other sections of the Department when they have needs for research or monitoring or evaluation to be done. And the idea there is, it's like trying to be responsive to their needs, rather than initiating things". This could include participating in technical committees in support of specific educational priorities, like inclusion or online schooling, as well as providing technical monitoring and evaluation input, for example on sampling, and analysing data from feedback questionnaires after events. This technical support could also include building capacity for monitoring and evaluation within the Branches.
This mode of responding to needs rather than initiating activities was not appreciated by all respondents. One official expressed frustration that he had to make special requests around the research needs of his section:

I hope this doesn't sound contradictory. I'm an advocate for having a research unit, but on condition that what that research unit does, the mandate for that unit, is set by the department. They have spent the last 10 years focusing on one area of our work only, right, and they've done some other things, of course… But I often think that, when there's a particular issue that we have, we may have to go to them to say, help us with this, help us with that.

The RCMED expressed an awareness that collaboration between the unit and other sections of the department was not always obvious and seamless, saying that one good experience of support often led to further and repeated similar collaboration, as Branches began to understand more and more what kinds of support the RCMED can offer. Further, the collaboration often took place between the programme coordinators in Branches and the RCMED staff, because of their responsibility to monitor the implementation of their own programmes, and not with the Directors of these sections. This means that the relationships are not built at the senior level where policy decisions are being made.

The RCMED also thought that Branches do not always have a good understanding of the mandate of the RCMED and may try to push some of their own monitoring responsibilities onto the RCMED. They made clear the distinction between programme monitoring, which is the responsibility of each Branch, and medium-to-long-term sector monitoring, which is the responsibility of the RCMED (presented in the section below). The RCMED said: "So sometimes how they approach us is, we have a programme, help us monitor it, and we would then say to them, hey, that's not [our responsibility], you have a monitoring responsibility, everyone has a monitoring responsibility for their own programmes. What we can do to support you is help you think of tools on how to do this monitoring… We refine the expectation, and then we do the task".

One example of Branch support was provided by the RCMED in the form of a Cabinet instruction to evaluate the impact of the National School Nutrition Programme, which was given to the RCMED and the responsible

Branch at the same time.

So, for example, the National School Nutrition Programme, it was Cabinet that instructed the department and said, as part of their overall government evaluation work, the criteria is evaluating large government programmes, so programmes that cost a lot of money, and so, as the DBE, you have to do an impact evaluation on school nutrition. And so, the nutrition people and us both get the mandate at the same time, or the request at the same time, and then have to sit together and agree on, okay, we think this is how we can support you, this is our role, this will be your role, and then we jointly do work like that.

However, it was clear from responses from DBE officials that the Branches relied heavily on the RCMED for support in the areas of programme monitoring and evaluation: "Because we don't have the capacity, we cannot do any monitoring. We cannot do any research and evaluation at the scale that the RCMED is doing. So, I think they've got more capacity, they've got more people who are inclined to [sic], who are actually researchers. So, in Curriculum you have basically your subject specialists who are not necessarily researchers". Another insider view from the DBE also expressed this tension between responsibilities and skills: "The original idea for each Branch was to have their own research, monitoring and evaluation unit. They didn't, why, because most of the people who come into the branches are teachers who know a lot about programmes, about project management, but not so much about research, certainly not about monitoring and evaluation."

The RCMED thinks that they are quite successful in providing the support required by other sections in the DBE, saying, "I think we often deliver what branches want, and go above and beyond that". However, there is also awareness of the fact that sometimes there is a mismatch between the expectations of Branches and the kind of support the unit delivers. This could be because the Directorate may bring more rigour to routine evaluations than Branches expect, resulting in more work than anticipated and not always producing the answers they hoped for. The RCMED also acknowledges that there is more scope to support Branches in reporting on the Performance Plan indicators, especially in streamlining the requirements and processes attached to this plan and its associated targets. Overall, the RCMED felt that their resources were stretched to capacity and that they could not provide more support than what they are already delivering.

Mandate KRA 2: Medium to long term sector monitoring

"Sector monitoring" was described by the Directorate as "understanding how many children are attending school, how we're doing in terms of grade completion rates, measures of learning quality, measures of equity and efficiency in the system, with the focus on outcomes". The School Monitoring Survey was named as an example of the unit's work in this area. One Provincial official echoed this idea, stating that: "They (RCMED) are responsible for the macro health of the education system, and therefore they can do research, evaluate, monitor the macro indicators of the system as to whether we are making the turnaround that we require."

This role was widely supported by officials participating in the study as a core responsibility of the RCMED, specifically as opposed to doing original research. There is a push towards more programme and Performance Plan monitoring, suggesting that the distinction between the different monitoring and evaluation functions are not well understood, or reflecting the lack of skills in this area within the different Branches. Overall, there was greater focus among respondents on this responsibility than on research, to a point where one person does not think they should really be doing original research:

It's strategic planning... They determine the indicators (for the Medium Term Strategic Framework and similar) for the implementation of deliverables in each Branch. So, in a way, they've got to check whether the structure of the department, through its different units, is responding to those indicators and targets. So, they are looking at monitoring and evaluation, and this is my view… from that kind of departmental indicator perspective,

and offer a critical view or analysis to say, okay, well, infrastructure or ECD or curriculum, you know this is how far you are meeting your targets and offer potential reasons as to why that is happening. So, it's almost like a reflection of the Department's work, but from a sort of research perspective, I'm not sure whether they should actually call it research in a traditional way, because it's more like a critical analysis of the department's goals.

And another respondent said: "Others in the Department are doing a lot of work with HR colleagues on analysis, trends and retirements and all sorts of things. And maybe that's the kind of thing that you need in a government department, more than what you need, this kind of interventionist kind of stuff that the RCMED did. But that's just my opinion."

In the same vein, it was argued by a DBE respondent that the monitoring function is what justifies the existence of the unit internal rather than external to the DBE:

That specific unit inside the department is to look at monitoring and evaluation of the department, you know, and how are we functioning? … In fact, the DPME's point of reference is the RCME and the strategic plan. So, you know, to me, that's how it should function. So, and if they stick to that, I think it'll be very coherent, and you're helping Government as to why they have set up an internal unit. Uhm, so it's not their mandate to go do actual field work to find out about the reading levels of learners and whether we are achieving the Mathematics and Science, you know, involving schools and learners and so forth.

Mandate KRA 3: Coordinating research, monitoring and evaluation

The responsibility to coordinate research, monitoring and evaluation activities in the sector was set out by the RCMED to include things such as, "having a research agenda for the sector to kind of inform the direction of research, providing links to information, to other reports that get done. Coordinating an interprovincial forum, … that is responsible for planning, monitoring and evaluation, to coordinate and give some guidance and capacity building to what the provinces are doing".

Although this role of the RCMED was prioritised by others in the DBE, many respondents interpreted this as an internal, bureaucratic function and not as a strategic role in the sector that could harness external resources and research to answer some sectoral questions, saying that the unit should be coordinating evaluation efforts within the Department towards greater efficiency:

And as a department, I think one of the areas that we are trying to rectify is how we can become more efficient in what we do. You know, we focused on quality, but then everybody said, okay, I'm doing quality, you're doing quality, and we're all doing separate programmes, and nobody was really looking at the efficiency of what you're doing. Are you duplicating what I'm doing? And that's where strategic planning and RCME has a very, very critical role to play. In fact, they should be the actual guardians. Okay, Unit X, Unit Y, you are actually doing the same thing, or your data sources are the same, so wouldn't it make better sense for you to merge?

An important element of coordinating and conducting research is the development of the research agenda for the sector. This agenda includes internal research priorities as well as guidance to external researchers on areas and topics in need of research. The agenda was developed through an extensive consultative process, including inside the DBE, in the national sector more broadly, and looking at international research trends and questions, but not all participants were aware of this process or can remember it. Those who are consulted do not always engage fully with the problem, as the RCMED remembers: "You don't necessarily always get good engagement… People are like, okay, noted, no comment." The agenda was then presented by the DBE to provinces, research institutions, universities and PhD student forums, to share the research priorities for the sector widely, in order to harness investment in research for the most effective results.

In the next section responses show that education officials do not feel that they co-own the agenda because their research needs are not represented. Some go further by saying that the RCMED manipulates the agenda by fundraising for the topics they are interested in, even if they do not represent the immediate needs of certain branches. This tacit resentment again shapes the attitude of policymakers towards the evidence that is produced by the unit.

Mandate KRA 4: Undertaking research, monitoring and evaluation

Data from the interviews with officials in the DBE overwhelmingly show that the original, experimental research function of the RCMED is most contentious. Reasons include that certain officials feel left out of the large research projects, like the EGRS, because their expertise or tools were not engaged in the process and have now been duplicated by external actors. Some are against external data collectors coming into schools under the auspices of the department, overwhelming and confusing teachers. Others feel that the topic of early-grade reading is not representing their areas of interest.

In contrast, the responsibility of doing original research was presented by the RCMED as a rational response to the need for more process data that could explain why inputs resulted in specific outputs, as well as a response to contextual developments at the time. This responsibility area is therefore *"where EGRS fits in*", as well as other studies that the Directorate commissions or conducts themselves. This is how they framed the start of the EGRS within the unit:

Before the EGRS there was only input data available, some output data at end-of-school level, and very little process data on how the system moved from the input to the output, (but) by the time we have the EGRS, we have a situation where there are all these other things happening across the sector. We are now split off from higher education, so there's more focus on what's happening in schools, and for the first time, we have that process, input, outcome, information, which then allowed [us] to say things about what was happening in schools, ... to make the link between the outcomes and the input, and to start to say something about what was actually causing our low academic achievement, what's happening in terms of teaching, what's happening in terms of the classroom. And so, that was the natural development, it wasn't a conscious development, but all of this happened context wise, at a time when internationally, we also had PIRLS information that we could then use, and TIMMS information, that we could then use to substantiate what we're seeing as the links.

However, several participants said that research was the responsibility of officials across different branches at DBE, and not just the responsibility of the RCMED, because research should underpin the policies that are produced by these officials. But, as stated before in the section on branch support, the capacity to do this research is not currently present in most branches.

This idea was also raised by a provincial official, linking the requirement for research capacity in all the Branches with the fact that this is where new policies are made, and that policies should be evidence-based because they have long-term impact on the system. This participant agreed that, unfortunately, this is not the case and the capacity is not there across the Branches.

If DBE is by law responsible for policy norms and standards, which means legislation and operational policies in terms of that, then my view is that everyone that works at DBE has got a component of research in the work that they have. And so, very often we see badly worded policies, curriculum design issues, simply because the research skills, even at an operational level, is lacking.

The RCMED added to the likely lack of research skills across Branches, that these technical sections probably also do not have the "mindspace" to reflect and solve problems, and that this responsibility is therefore better served by a dedicated unit. "I think it is the more innovative, piece of our work…Whereas I think Curric-

ulum will often say to us, we don't have the space and time to sit and think about how we should be doing X or Y, like we're doing it, there's no time for that, and you guys are supposed to go away and think about this thing and come back and tell us what you think."

When it comes to deciding what research areas on the sector agenda to focus on, some felt that the unit picked the topics they were most interested in and did not pay enough attention to the range of policy needs in the Department. As one official put it:

But ultimately, if you then provide the leeway for the Research unit to be the one to go and fundraise for whatever it is that they need, or to guide when USAID comes to say we've got some money we want to do research, what do you think we should do? So, and that's why I'm saying, I do think that you, if you have a research unit, then you need to be much more specific about what it is that they do and what they don't do. And then, in a sense, you have to keep them accountable to that.

The sustained investment over 10 years in early-grade reading is a problem for some people, because they think other topics have been neglected as a result. Most participants shared the view that the research agenda needed to meet the needs of a wide range of stakeholders in the DBE. It was argued by a Provincial official that research and evaluation units would be in demand and could become more prominent and better resourced only if they provided a valuable service to stakeholders. There is a view from the Provinces that the RCMED has become quite prominent and in demand across different branches through the EGRS research, but that that topic has now been exhausted. Stakeholders are losing interest and want to see other topics addressed which may have a pressing relevance for them in their contexts.

If you look at the work that [the RCME Directorate] is doing, it's becoming popular even in DBE meetings... The issue is, how do you make sure it's dynamic? You can't preach the same thing on and on and on. Now if you're dealing with research, then it's broad. Then the question is, okay, you've kind of exhausted early reading, what else are you doing? What other problems are you going to tackle? … What we can't be, is an area specific specialist, to say you know, we're going to focus on languages and early grade reading and language acquisition (only).

This comment suggests that a research unit that has a singular focus will lose resources and prominence as a result of losing broader relevance to their key stakeholders within the government department. This participant further added: "If you look at the early-grade work, it's good, but it's not having the desired impact on systematising the intervention. We still got like 20 interventions in early-grade reading across the provinces".

Other DBE officials were of the opinion that it was not necessary for an internal unit to do original research but rather to consult existing research and evidence to respond to policy questions:

*I think it's important for the DBE to have its own research capacity, but to guide it, and you know, my contention is that if you don't, it's not going to be useful for you. And their [RCMED's] research agenda must be set from within the department, from within the sector, right? … If you're the Director-General and you sit there, and you've got an issue that you're not clear about, you call them, and you say, what do I do here? And they say, okay, let us go and look at whether there are studies. They do not have to do an*y original research *They just pull, you know, reviews and things, and bring you the evidence.*

Another voice from the DBE suggested that the kind of experimental work done by the *RCMED* is not appropriate for Government and should rather be done by external researchers, to a point where it is hard for traditional bureaucrats to embrace such projects:

The interesting thing about the leaders of the RCME unit is that they aren't traditional bureaucrats, but kind

of… kind of one foot in academia and one foot here. Not the, you know, the traditional bureaucrat that, you know, this is the line that I get, and this is what needs to happen. I mean, I'm not particularly creative or innovative, you know, I run a system that's big and that takes long to change, and that's perhaps why you, you need civil society that's a lot more agile, a lot more derivative, that can push the envelope that is a bit more difficult for us in in the bureaucracy to do. So, my sense, when I look at this now, EGRS, maybe is a very good example of that, is that I think a lot of how that was conceptualised was driven from outside of us. It wasn't driven by Government necessarily.

One official had the opinion that the RCMED had limited budgets and human resources and that it was, therefore, not cost-effective to spend it on an extensive study like the EGRS: "I don't know what their budget is, but I assume it's like mine. ... I'm not sure how big they are, you know, probably three or four people, five people, I don't know, and those are the limitations that you have. I'm not sure if it's a good idea to get your research unit to do the kind of work that they have done with EGRS, both in terms of time, in terms of effort, in terms of resources allocated."

Also, from within the DBE there came a strong position against the RCMED doing original research like the EGRS, because of the duplication of efforts to collect primary data from the system, especially collecting learner assessment data in addition to what the DBE is already collecting:

And we've seen that become problematic to the extent where we have said, look RCME, why are you doing early-grade reading study, what? What is the purpose behind you doing it, and on what mandate are you doing it? Because if you want to establish proficiency of learners on reading, we have a national assessment framework. We have different tiers. Do you want to approach it from a systemic level? These are the programmes that we're doing. Do you want to approach it from a diagnostic level? These are the programmes that we are doing. Can't we rather use your tools and see how we merge them into an existing programme, rather than you going out on your own and doing a programme and seeking funding for it, by the way, as well. So, it's been a contentious issue, which I don't think we've really resolved.

Further, there is the opinion that the RCMED is not set up to collect primary assessment data and therefore have to outsource this function and bring external actors into the system, which overwhelms schools and directs additional, external resources to cost-inefficient activities. Further to the point of duplication, there is great frustration that existing datasets are not being fully analysed and used and a lack of partnering between these internal units of the DBE: "So, what additional information will you be telling us through your study that isn't already coming through the system? So, I think it's where a little bit of protectionist views come in, you know [RCMED saying]: 'This is my territory, and you know, we are entitled to do it.' Yes, nobody's going to stop you, especially if you've got external funding." This view on being territorial can also be seen from the opposite perspective when the same respondent says:

Now, where we find a little bit of encroachment, where it becomes a little bit uncomfortable, is when we find the RCME unit conducting assessments, because they could be looking, in my view, at what we are doing. … What often plays out in reality is we have the RCME unit conducting assessments, which is not their mandate. So, if you look at the early-grade reading study, it is a typical example of now a research unit actually conducting assessments to establish a proxy on learner achievement, which is now the mandate of another unit. … And when it comes to evidence-based decision making, then you've got two sets of data... which might be posing a contrary view and… then you're pulling the system in different directions.

Several people expressed ideas about the level of independence that a government-led research hub should have. This issue is discussed in detail in the section on embedded and external research hubs, later in this chapter.

Mandate KRA 5: National and international reporting

This responsibility was detailed by the RCMED as reporting on SDGs or African Union indicators, as well as national reporting, which includes answering Parliamentary questions on education sector statistics and other matters. One practical example that was cited relates to school dropout rates: "Even though we have an EMIS section that's responsible for data, often, if there's a query that includes some stats, it comes to us, whether it's the Human Rights Commission that has a

question on how many children have dropped out, or how many girls are in school, etc." No participants from within the DBE or from the Provinces, or even the DPME or external researchers referred to this function of the RCMED in their responses. This may indicate that this function is not contentious, and that people have no emotional responses to this area of the RCMED work, or simply that they are not aware of this responsibility area.

4.2.3 Collaboration of the RCMED with provincial research units

In South Africa, the Department of Education is managed in a decentralised way, with the provinces managing their own budgets and making much of their own implementation decisions. Some policies are determined nationally, like the curriculum, but instructional approaches can be decided at the provincial level. In the context of monitoring, evaluation and research the provinces are expected to have their own responsible units, and to support national initiatives in their geographical areas. The socio-economic contexts vary greatly across provinces, and local offices should bring this contextual knowledge to research and evaluation in their areas. Finally, the provinces are "evidence clients" of the RCMED, because they make decisions about the implementation of national policies.

Employees from three provincial monitoring, evaluation and research units were interviewed. Some have a clear vision for provincial research hubs and articulate why these are needed, but this goal is affected by resource constraints. The vision includes strong links between provincial and national research units, mostly so that provinces can tap into greater research capacity at the DBE. One province said:

We do not yet have such a unit, but in terms of our concept document, we are looking at such an institute that will be independent or collaborating with all the universities, … we're saying this is a platform where we can influence policy development. But also be led by DBE, because DBE is very important. We don't want an independent provincial department, but we want to link directly with DBE, it will assist us.

The provincial research units are typically multi-functional offices that combine several functions related to assessments, programme monitoring and reporting, and supporting research. Matters of school functionality and learner performance are paramount in the monitoring and evaluation mandate and agenda of the provinces.

Responses from provincial departments indicate that there is not great depth and capacity in research, monitoring and evaluation units, but rather that they respond to concrete and bureaucratic tasks more closely related to monitoring and coordination functions than original research and evaluation.

Collaboration between the national RCMED and provincial research units vary, being strong in some cases and weak in others. The view expressed by one of the provinces is that there is no real partnership or collaboration that is mutually enriching, but that the provinces merely help facilitate the work of the national RCMED, where required. In another province much of the collaboration focuses on monitoring and evaluation of service delivery, and not on shared research goals. Provinces also recognise that they do not reach out and initiate a partnership. As one province put it: "We will contribute to where they request for assistance. I don't

think we've initiated anything at this point in time," and another: "We support some of the work of RCME in terms of ELNA and those things, and then obviously we would coordinate some of the work around the School Monitoring Survey and those kinds of things. But I don't think we've undertaken any joint exercises with them."

One province said that they do take note of the findings of the RCMED research and evaluations and that they implement these findings, where possible, as well as joining the RCMED at national research conferences. Another province said that they are often approached in an ad hoc manner by different branches in the DBE to do research or evaluations in their schools. This is not done in a coordinated way and it is not part of a longer term plan, which is not constructive for the provincial research unit, and which puts strain on their limited resources.

There are sporadic incidents and unplanned approaches from DBE, especially different branches. Branch C… they come in and say, we want to make an impact assessment study on the policy development or implementation or for the reading with meaning. So, we felt that it was not well planned. But if you can plan together, we'd know that in each and every year, we know that these are the programmes that are going to be implemented on research and evaluation in our province.

This province expressed clearly the desire to plan and coordinate research in their department, but somehow, they do not have the agency to do that, possibly because they are desperate for additional resources.

4.2.4 Measures of success

To help answer one of the key research questions in this study, *What makes a successful government-led research hub?* respondents were asked what their measures of success were for the RCMED.

For provinces, the main indicators of success are whether the RCMED works closely with provincial officials and whether research results are taken up in policy at provincial level. As they put it: "The first thing we got to test on success, is whether people are participating, they're volunteering, they're adding their knowledge of the issues to the discussions, and they adopt it as part of their work." They added that conclusions and recommendations must be fresh, relevant and helpful, so that it can be taken up into key performance plans.

This desire for close collaboration and shared ownership of results was illustrated in the example of fieldwork. One province identified success as good fieldwork that uses reliable tools, and added that this could only be achieved through the involvement of officials who are close to the schools and teachers and who can help refine the validity of the tools.

For one province a key measure of success was whether the annual evaluation and research plan has been included in the annual performance plan and well executed, and whether targets were reached. Similarly, DPME referred to executing the plan and reaching the targets set for evaluations nationally as a key measure of success. A different view also came from DPME: measuring success in terms of impact of research and evaluation on the improvement of education system outcomes.

Another expression of the success of the RCMED came from a researcher, who said that the opinions of education researchers at universities used to carry more weight before the EGRS, and that now, the opinions of researchers within the DBE have surpassed them on certain education-related matters because their positions are informed by large-scale data:

[Internationally] there [was] this changing zeitgeist of what counts as evidence and what's strong enough from an evaluation point of view, and how do we know what we know, which changed before and after the RCTs, I think. Like before that, the views of educationalists that were just sitting in UCT or UP or Wits or whatever

were much more prominent and important, in my view, in the South African national discourse, than they were after this (the EGRS series), because without data you're just another person with an opinion, right?

One external participant celebrated the success of the RCMED by comparing it to other international examples, noting "It is by far, from my point of view… it's by far, at least for this topic of improving learning, which I'm saying carefully, because I don't just mean early-grade learning, just in general, this issue of learning, this… this research group inside of the department is by… is definitely the best example of what's possible by a significant margin."

The RCMED articulated success as conducting meaningful evaluations that lead to programmatic change by following through on the administrative processes to implement its recommendations.

I think in evaluation, similarly, we've been able to support people in evaluating in meaningful ways and I think we've seen… and maybe a measure of success is not just… what we've done is seeing their responses post the evaluation. So, I know with the school nutrition programme, once the evaluation was done and it's reported to Cabinet etc., we came up with an improvement plan jointly with them, and those recommendations got absorbed into their operational plans and into people's performance agreements so that they actually do the improvements, so it doesn't just stop it, we gave them a report and we're done. I think we are ambitious, and we want to see those recommendations actually leading to programmatic change. So, in that kind of way, I think we are successful.

In the same way, to be successful, evidence of what does not work must be noted and must lead to programmatic change: "Our research has included negative findings, which I think is a successful thing. Like to have found that something doesn't work is a good thing, but yeah, I guess it's also more a good thing if it means people stop doing things like that, maybe that's the ultimate measure of success there."

Another measure of success identified by the RCMED is to meet the needs of the department for certain products or tools by doing innovative development work that is rooted in research: "[We have] space to also develop things where there are gaps. So, the reading benchmark work is: there's a real, literal gap in how we are doing something which is teaching reading across the country. We can raise the resources and use our skills and actually produce an output that then
other people use, that contributes to the broader education of children."

4.2.5 Conditions for success and replicability

The position of the RCMED within DBE

Participants raised issues of political economy and prioritisation in relation to the position and reporting line of the research unit in government. For the unit to be able to focus on original research, time for this had to be protected by senior managers so that they do not get bogged down by bureaucratic responsibilities. Reporting directly to a strategic manager level in the department was identified as one way to strengthen the influence of research findings. As one respondent put it: "You know, if you want a powerful research component, it can't be located in a branch that is not advising the senior level."

Responses suggest that it is important that the supervisor of the RCMED has the ability and room to prioritise research as a key performance area, and especially longitudinal research, like the EGRS series. One respondent said: "As I understand it, (the previous supervisor of the unit) was also offering some political protection, or, I don't know what you want to call it, like cover for the people to do the work, as opposed to getting sucked into bureaucratic nonsense, right?... To be able to go and actually do, like, good work."

Another interviewee had a similar view of the difficulty of the political economy and prioritisation, saying: "I think it's really hard to protect people's time, to think long term strategically and take research seriously, given every… all the other, like, urgent, immediate needs and political demands within a government department." However, he credits the tenacity of the Director and Deputy Director for staying the course with the EGRS over 10 years: "I think it was remarkable they were able to pull it off. But I don't think it's very easily replicable. I think it was very much contingent on those individuals. And you know, both their capacity and patience in building it up internally, and also their capacity to bring in their credibility as researchers."

The DPME also supported the view that time for original research must be protected. As one member of the DPME noted, "So, a successful research unit in a department needs to be protected from the mundane, bureaucratic expectation. So, things like having to do APPs, TIDs, answering Parliamentary questions, writing a speech for the Minister or the DG or the Deputy Minister. These bureaucratic requirements, they make you lose the edge of doing the proper research, because your mind gets divided".

Partnerships and collaboration

While internal collaboration was explored extensively in the section on the RCMED's research mandate, this section explores respondents' perceptions related to collaboration with external partners. The issue of research independence, which is linked to the theme of partnerships and collaboration, is further discussed in the section on the pros and cons of embedded EdLabs under RQ3.

One senior official in the DBE said that it was known from the onset that the skills and human resources of the RCMED would need to be complemented by partnerships with other research institutions, including sharing access to large datasets. "We knew that the unit that we are going to establish will not be able to do all our research or respond to all our research questions, and we wanted people who come from institutions that are already involved with research."

In fact, one of the key responsibilities of the RCMED is building networks with research agencies that strengthen its internal advisory role: "Building those evidence networks to help to boost our capacity, our view, but also understanding what the big research questions and research findings are that we could then mobilise for decision-making in the sector." This requirement was also highlighted by one of the provincial hubs: "One of the big things I ask people when they ask for a job here is, what's your professional networks? Because you must be able to pick up a phone and talk to somebody and say, 'You know, I've been sitting with this, what do you have, or what do you know? Do you know somebody who can help me with it?'"

All hubs interviewed say they work with universities and other research institutions, mainly South African but also international institutions. This supports the view that all the necessary capacity cannot be seated in the hub itself.

External researchers and universities are also seen as a source of new and independent ideas that can bring fresh ideas and greater insight to the education research led by the government. As one province put it: "You don't have to have them (contracted external researchers) full time, so that we can give them the role of being a free agent at the same time and have an independent opinion". Another provincial official said:

What is also important is the linkage with all the universities, not one, because if, for example, you are in Mpumalanga government, you are only aligned to Mpumalanga University, it is going to be a problem. What about those that are in the University of Pretoria, University of Stellenbosch? So, we need that… that platform that is independent, and also it will assist all of us to come up with, you know, an independent opinion in terms of research and output.

However, while independent research ideas and results are valued, the government-led research hubs are still responsible for considering the practicality of policy recommendations and the wider ramifications policies may have on the system. One of the provincial research hubs articulated it as follows: “Whatever they tell us, we must be able to implement and also follow up in terms of what are the consequences of implementation of those policies.”

One respondent thought that an official partnership with an external research institution, as well as external funding, would help to safeguard the unit’s focus on the kind of experimental research done through the EGRS: “A model I would think of is to have units within government, but I think some kind of external funding so the time is protected, and some kind of institutional connection with a research university or think tank or something that kind of makes it far more official than the kind of partnerships that they [RCMED] were able to unofficially accomplish (for EGRS).” In addition, one participant thought that the inclusion of a researcher from Georgetown University in the United States was instrumental in establishing the global reach of the EGRS.

There is a particular connection between the RCMED and Stellenbosch University, with at least four current/former employees in the RCMED having completed or are working towards their PhDs there. Furthermore, most of these PhDs were done under the supervision of the same person at Stellenbosch. Another key researcher in the office of the DG is employed both by the DBE and Stellenbosch University. This relationship was mentioned by three respondents who hold different opinions on this issue. Two people thought that the closeness of the relationship was positive and even decisive in the success of the EGRS series, with one crediting the Director of RESEP with convincing one of these researchers to work for the DBE, and another saying: “All of these people, actually, I think, had a lot of very formative experiences [at Stellenbosch, doing] data analysis, like working on education data, [with a] pro-poor, social justice angle of looking at quantitative work on education, and I think that’s an important part of the story…” And also: “That semi-permeable membrane between the university researcher space, like RESEP and the RCME DBE, … I think [is] very beneficial to the researchers from, like, a data access point of view, very beneficial to the Department in the sense that you’ve now got a competent set of researchers that are coming into your Department as employees.”

Another respondent had a less positive view of the close relationship between the researchers at the DBE and Stellenbosch University, positing a conspiracy theory that the EGRS was driven by researchers at Stellenbosch external to the RCMED, and that they somehow benefitted from the graded readers that were purchased through the studies to be used in all the schools. (This is unlikely, since the external researchers in the EGRS came from Wits University in Johannesburg and Georgetown University in the United States, and the readers were produced by a Johannesburg-based NGO.)

One respondent was of the opinion that the participation of the EGRS principal investigator from Wits University gave credibility to the study because he previously worked for a provincial education department and was involved in at least two of the preceding studies that influenced the EGRS (GPLMS and R-CUP), as well as being internationally connected. “And I think [he] was probably one of the golden threads that was going through that to bring the lessons of GPLMS and the coaching logic and the, you know, teachers need support in the classroom, the triple cocktail, all of that sort of stuff.”

Required background knowledge and skills

It is critical to understand the knowledge and skills that are most valuable for members of a government-led EdLab to possess. This section discusses the capabilities that respondents perceive as essential for a government-embedded EdLab to be successful.

Basic research, monitoring and evaluation skills

Respondents from within the RCMED emphasised the need for monitoring and evaluation skills, especially to support the DBE branches in fulfilling their monitoring and evaluation requirements. One person stated:

You need to guide them on what's a valid measure for the different things that you're speaking about. You need to say, that's a bad question, and this is a good question, and this one you're leading the people, etc. So yeah, I think there is a monitoring aspect there, and then, I think about evaluation as well. Quite a lot of the time, having to help people figure out the appropriate evaluation design for what they want to evaluate, and sometimes, unfortunately, showing them that the thing they want to evaluate is not possible. So, people will say they want to measure the impact of something, but there are technical requirements to measure impact, and there's [sic] criteria that if we don't meet those criteria, we can't measure impact.

A provincial employee emphasised the importance of appointing people with "proper research skills", suggesting this may not always be prioritised at provincial level. He said, "Do not compromise the province".

Quantitative, qualitative and desktop research

Both quantitative and qualitative research skills were highlighted as important, particularly because the RCMED is required to work on large datasets. A member of the RCMED reflected, "One specific set of skills is the more quantitative data analysis skills, because those are, I guess, fairly scarce across the department, and we do have large datasets that need to be analysed. Especially if it's on the production of statistics, like national, provincial statistics, then one needs to have those specific skills. Some of our team members are quite good at that."

Desktop research skills were also identified as a key skill. These skills help ensure the RCMED team is able to use existing evidence and practices from other contexts to guide decision-making. One respondent explained: "Your ability to be on top of research, to be able to look in journals, research, talk to other academics, you know? … The thing about desktop research is that, at least your theoretical understanding of what is happening is clearer because it's been documented in other contexts and so on. It makes it easy to buy time and to do the right thing."

Knowledge of economics, finance and the education sector

Broader sector knowledge and some subject-specific specialisation was viewed as valuable. Respondents from within the RCMED emphasised sector knowledge above deep specialisation, as external expertise could be brought in for narrower tasks when needed. As one interviewee noted:

So, I feel like we bring the kind of bigger picture sector knowledge and apply it to different areas, or apply other research methodologies to different areas. In some areas, we kind of learn a bit in the process of the actual subject knowledge or content, but in general, we end up having to operate across so many different spaces that you become a bit of a generalist. … We try a little bit to collaborate internally with people, but often we do have to go external if you need somebody to do a lesson observation or materials review. Generally speaking, we might try to get some advice or support from colleagues and other branches, but generally speaking, for the heavy lifting of the work that needs to be done, we have to go external. And I think it would be difficult for us, actually, unless we were a larger unit, to hire somebody in one of our posts who's really a specialist on something a bit narrow.

Economics of education skills were also highly valued by the DBE. Along with knowledge of public financing. One senior manager shared:

I think we would also need expertise in finance, because the economics that is there is education economics, but we also need finance economics, given the fact that we are experiencing an extremely volatile fiscal environment, we need people who can do research for us and come up with some alternatives and solutions that we could consider to get financial resources other than just depending on Government. … You know, when you do research, you also need to think about how you're going to implement the findings that are coming out of research, and implementation cost money in most instances, so you need such people with financial background who form part of the research team to help to inform the implementation of the findings that are being made, and look at other streams of funding that people can tap into.

Communication and soft skills

Along with technical expertise and knowledge, soft skills and research communication skills were also highlighted as essential – especially the "knowledge brokering" skills needed to bridge research and policy. One respondent explained that it is not just technical research expertise that is needed, but soft skills as well:

So, you need some strong ability to deal with organisational politics at the top, so they represent the interests, why researchers, research or evaluation is important. You need people who are interested in evidence, some champions in the management system that are interested in evidence. You need to be recruiting people who are, you know, really skilled for these roles. You just, you don't just want bureaucrats. You want people who are competent researchers and evaluators, who are able to analyse and use data, and who could work well with other departments, and so the soft skills are important as well. You know, it's important to recruit the right people. It's also important to be able to get people from outside the government, who perhaps had more exposure to evaluations and research.

A respondent at the provincial level referenced a large longitudinal study that lost funding because the importance of the data was not effectively communicated to political decision-makers:

We lost that battle, and we lost that big information that we could have gotten. And I blame ourselves that we were not able to communicate the findings effectively. We were not able to communicate the findings in a way that they are useful for the politicians, for what they need. So, we chose to be technical and academic about this, and in that way, we lost information that we should have kept so that as we go through the years, we will be able to see how people are affected by policy and the decisions that we are making.

Another respondent emphasised the importance of agility and responsiveness:

So, you need an organisation that is very nimble, forward-looking, able to anticipate where the demands are of the organisation so that you can be able to give them the answers, and then they see your usefulness, and actually you create a demand for the work that you are doing. Similarly, you need to be able to defend your findings, be able to communicate your findings and be able to write them in a way that non-academic, non- technical people can understand them and be able to use them, otherwise, then they don't understand why you even exist.

Individual attributes

As is implied in the sections above, the characteristics of the individuals in the RCMED were seen to be critical to its success. The individuals employed ultimately seem likely to impact the influence that the RCMED is able to have. This is discussed further with the findings under research question 3.

Resource challenges

The point has been made that the more useful a research unit is to its "clients" inside the department, the more they will be valued and resourced. It has been highlighted that good communication skills contribute to this relational aspect, but more direct fundraising skills also emerged as important.

Unsurprisingly, the findings show that constrained resources is one of the main challenges faced by the research hub. The allocation of resources largely depends on the political climate and on prevailing priorities in the Department. A senior manager in the DBE summarised, "Well, I would honestly say that they are not adequately resourced. … Government doesn't seem to place investment on research. Government tends to depend a lot on research done outside than investing on expertise to do research internally and work, of course, with other institutions to do research."

This sentiment was echoed at the provincial level. The importance that management attaches to research, monitoring and evaluation often determines the resources available to the unit to make a meaningful contribution, which can become a vicious circle. One respondent said:

The single biggest challenge in setting up a unit like this, is the view of managers as to whether they think this is an essential service, or it's a nice to have. If it is just nice to have, it means it's going to be always on the periphery. If they see it as an essential service, then they're going to put their effort into making sure that it is capacitated, funded correctly, and that it is having the desired impact in status across the organisation.

The communication of research findings and the level of responsiveness to the needs of each organisation were presented as decisive in the value and resources that are attached to a research unit. One manager captured this relationship-building and "selling" of research services very well when he said:

You've gotta make sure that you're delivering outputs that people become dependable on, and the minute they see that, there will be an increasing demand for your work. You know, I tell people that work in my branch, that you are only hired because of your intellectual capacity. That's it, and your sell-by-date is reached when nobody asks for your opinion… People need to look for you… they need to look for you. You can't be invisible in the organisation.

Another former employee of a research unit also mentioned the importance of always advocating for evidence-based decisions, and then providing that evidence, in order to stay relevant and adequately resourced.

The data show that, at the national level, much of the funding is raised from external donors, and done on the initiative of the staff members of the Directorate despite it not being an expectation or part of their key responsibility areas. At the provincial level, employees do not speak much about fundraising, but rather seem to expect that the budget allocation should come from the province. A concern was raised that donors may have their own priorities and requirements which may lead to a compromise in terms of the actual agenda and priorities of the research units. These funds also do not flow through the research units, but usually pay for external resources, and therefore it does not result in building the internal capacities of the government research units.

In one province the resource constraints are such that the unit is not producing any tangible results: "(The research unit) has not been active and visible that much, it is still a work-in-progress and we will see how it goes after the plea to make it more visible… There is nothing to show for what they have done until now."

Financial resources are closely linked to human resources. All the research units studied stated that constrained budgets hampered their ability to employ enough people, except one participant whose opinion was that government salaries are quite good, and who did not have problems retaining staff due to salaries. One of the provincial research hubs shared that they invest heavily in skills development of middle managers in mon-

itoring and evaluation, including support for them to publish peer-reviewed articles, but that these people tend to move to better paid positions elsewhere once their professional capacity has improved. Another research unit also said that they lose good researchers to better paid positions at universities and in the private sector. One strategy to mitigate this attrition rate is to train younger or newer staff, so that they can be promoted within the research unit (before they reach a ceiling and leave). Another strategy is to flatten decision-making structures in research projects so that junior researchers can participate more or less equally and develop their conceptual and analytical skills. Another unit mentioned that using internal staff was cheaper than contracting external researchers, provided that there was enough stable funding to permanently employ appropriately skilled people.

It was also mentioned that many researchers leave government employment because they typically want to be independent and able to follow their interests, and not necessarily be guided by government mandates. The view is also that time pressure is much worse in government than at universities and some researchers prefer a freer environment to determine the required timelines for their research.

4.3 What are unique and replicable implementation and evaluation lessons learnt from ten years of early-grade reading studies?

The EGRS series represents a decade-long effort to improve foundational reading literacy in South Africa. The studies implemented a range of interventions, including structured learning programmes (SLPs), teacher coaching, and resource provision, to assess their effectiveness in improving reading outcomes. Drawing from qualitative interviews and study documents, this section synthesises unique and replicable lessons learned from implementing and evaluating the EGRS series, focusing on themes of capacity building, stakeholder engagement, and sustainable strategies for scaling and maintaining educational improvements. Perspectives on these lessons varied across different stakeholders, particularly the RCMED, provincial education officials, and programme implementers.

4.3.1 Key implementation lessons

Building teachers' capacity: Addressing knowledge and practice gaps

One of the most widely acknowledged lessons from the EGRS was the necessity of continuous teacher capacity-building to enhance literacy outcomes. Respondents from the RCMED and provincial education officials agreed that structured lesson plans played a vital role in supporting teachers, particularly those with limited pedagogical training. The RCMED team emphasised that structured lesson plans ensured alignment with evidence-based instructional practices, providing teachers with a clear framework to follow. However, provincial officials and some programme implementers noted there was initial resistance from educators, as some teachers perceived lessons plans as restrictive rather than supportive.

A provincial education official reflected on this tension, stating, "We had to find a way to integrate structured plans while still allowing teachers the space to adapt them to their classroom realities." Over time, as teachers became more accustomed to the approach, many reported improved confidence in delivering literacy instruction. Balancing structure with flexibility while ensuring high teaching standards was a key takeaway.

Respondents also emphasised that foundational literacy outcomes depend on teachers' understanding of pedagogy, classroom management and effective utilisation of resources. One interviewee remarked, "We realised the gap between the current teachers' knowledge and the requirements, emphasising teacher development". This insight highlights the necessity for sustained professional development that includes both the-

oretical and practical components. All the interviewees stressed the need for teacher training tailored to the context, especially for underserved and hard-to-reach areas. Respondents also highlighted the importance of ensuring that coaches had the necessary soft skills to manage the various school challenges. In addition, this effort of capacity-building was also extended to the departmental heads and subject advisors to build a strong support system for the teachers.

Furthermore, the strategies for teaching writing evolved during the EGRS. This is because it was found that there was a big gap in the ability of teachers to teach writing. A respondent remarked, “We realised that people couldn’t teach writing, and we focused on that. We developed a good strategy for teaching writing and started to implement it”. To address this gap, the programme provided the teachers with well-defined lesson plans to help guide them on how to teach writing. These plans provided a checklist of the steps the teachers could follow to achieve overall literacy goals. The teaching of writing was integrated into broader approaches, creating a holistic approach. By aligning writing instruction with reading and phonics, the programme ensured that writing was not an isolated skill but an essential component of literacy development.

Coaching: The most effective support mechanism

A dominant theme across interviews was the role of in-person coaching as the most impactful intervention in teacher support. There was a strong consensus among RCMED officials, funders, and programme implementers that in-person coaching provided direct, hands-on support that translated into better teaching practices. Virtual coaching, while cost-effective and logistically more feasible, did not yield the same level of engagement and accountability. One RCMED interviewee remarked, “A coach visiting your school creates a sense of responsibility that a WhatsApp message simply cannot replace.” Another respondent stated, “The virtual coaching was not as effective as the in-person coaching. Human accountability and having a person come to your school, visit you, and see you create a greater sense of responsibility and accountability. The relationship built during the in-person coaching was more valuable in the end.” However, virtual coaching also had advantages, such as the fact that it was cheaper to implement and could be combined with in-person support, thus making the best use of resources. The schools with high needs had in-person coaching, while others had to make do with virtual coaching.

This finding underscores the need for personal interaction in professional development. While digital solutions can supplement coaching efforts, they should not fully replace face-to-face interactions, particularly in resource-constrained environments where teachers benefit significantly from real-time feedback and mentoring. Additionally, the selection of coaches was identified as critical to the programme’s success, and therefore, selecting the right coaches was deemed necessary. Respondents pointed out that coaches should have literacy knowledge and an understanding of the teaching process, including classroom management. Trust was also identified as a fundamental element in the coaching relationship. “For coaching to work, it’s essential to develop relationships of trust, where teachers feel supported rather than judged,” one of the interviewees said. This was especially true of the external coaches, who, because of not being part of the supervisory hierarchies, helped the teachers open up and be more receptive to their advice.

A further key finding was that coaching should extend beyond teachers, to include departmental heads and subject advisors. This broader capacity-building ensured a strong support system that can sustain and reinforce good teaching practice even after external coaching interventions conclude.

Stakeholder engagement: The critical role of subject advisors

The engagement of subject advisors was another critical lesson learned. Initially, their role was not fully integrated into the implementation process, leading to gaps in communication and alignment between programme interventions and district level education priorities. Over time, it became evident that involving subject advisors from the outset enhanced programme sustainability and local buy-in. One RCMED official noted, “We underestimated how crucial it was to involve them deeply and [take] their opinions seriously”. Implementing organisations echoed this statement, with one respondent stating, “You have to respect the fact that provinces and districts have their own agendas. Building relationships and aligning with their agendas to some extent is crucial”.

To ensure effective delivery of EGRS interventions, collaboration with district officials was strengthened. This was demonstrated through their inclusion in training sessions and progress- monitoring. Subject advisors played a pivotal role in training, ensuring that teachers received consistent messaging and that interventions aligned with provincial priorities. Their ability to act as intermediaries between external programmes and local education structures helped mitigate resistance to new methodologies.

Subject advisors were also instrumental in supporting coaching efforts. Their direct engagement helped reinforce the messages delivered by coaches, fostering a unified approach to literacy instruction. One respondent noted, “Subject advisors need to be part of the process, not just observers, to ensure they deliver a consistent message to schools.” However, some challenges emerged, including skills gaps and conflicting priorities. Respondents stressed that ongoing professional development was necessary to enhance subject advisors’ literacy pedagogy and phonics expertise. By involving them as co-creators in intervention planning and delivery, potential conflicts were mitigated, and programme alignment was strengthened. Their involvement in training, coaching, and monitoring activities fostered a sense of ownership and continuity within the education system.

Technology: A useful but challenging tool

The introduction of digital tools, particularly tablets for lesson delivery, was met with mixed emotions. The RCMED viewed technology as an enabler of efficiency, improving lesson preparations and reducing the administrative burden on teachers. It was also mentioned that the use of technology helped track lesson delivery and learners’ progress in real-time, enhancing accountability. However, programme implementers and provincial officials highlighted significant challenges, including infrastructure constraints, limited digital literacy among educators, and inconsistent access to electricity.

One respondent reflected, “Teachers gained confidence using tablets, but, in some schools, the lack of charging facilities made it impractical.” This insight emphasises that, while technology has potential, its effectiveness depends on systemic readiness. Proper infrastructure, ongoing support, and training are essential for ensuring that digital tools enhance, rather than hinder, teaching and learning.

A key takeaway was that digital tools should be integrated gradually and with adequate training to maximise their impact. Merely distributing technology without clear usage guidelines, training, and support often led to underutilisation.

Embedding research and evidence into policy and practice

The iterative nature of EGRS design allowed for continuous learning and adaptation based on research findings. The RCMED emphasised that data from successive EGRS phases were used to refine intervention strategies, ensuring that programmes remained responsive to emerging insights. However, a key challenge identified by some provincial officials was the lag between research findings and policy adaptation. A respondent from one of implementing organisations noted, “There is a wealth of research from EGRS, but it does

not always translate into immediate policy shifts. The bureaucracy slows things down, and sometimes, by the time a change is implemented, the initial context has evolved." This sentiment was echoed by a funder who stated, "We need to bridge the gap between research and action. Government needs mechanisms that fast-track evidence-based decision-making."

Government officials acknowledged these delays but also pointed to structural constraints, including lengthy approval processes and competing priorities. One provincial official remarked, "Research findings inform our work, but we have to align them with national and provincial education strategies, which takes time". Additionally, implementers and funders stressed that, for research to be effectively embedded into policy, it must be disseminated in ways that are accessible to policymakers. One funder stated, "If findings are locked away in academic reports, they won't be acted upon. We need digestible summaries and direct engagement with decision- makers." To address this, some initiatives sought to integrate evidence into strategic discussions and align findings with national frameworks.

Another crucial element was ensuring that evidence informs not only national policy but also district and school-level implementation. A programme lead observed, "It's not enough for government to endorse findings, district officials, school principals, and teachers must understand and use them". This highlights the need for more structured dissemination processes that translate research into practical guidance for all levels of the education system.

In response to these challenges, some stakeholders recommended establishing formal feedback loops where research findings are regularly presented to policymakers, district officials, and implementers. One funder suggested, "Embedding learning within decision-making structures, such as education planning units could help create a culture of evidence use". Another proposed that pilot programmes be used as testing grounds for policy adjustments before scaling interventions nationally.

Despite these challenges, EGRS demonstrated that iterative research-driven adaptations improved intervention design and execution. Strengthening mechanisms for faster research-to- policy translation could enhance the long-term impact of evidence-based interventions, ensuring that insights do not remain academic but actively shape educational reforms.

Contributions to other literacy programmes

The EGRS played a crucial role in shaping other literacy programmes in various organisations. Some structured lesson plans and pedagogical approaches used in EGRS were adopted in other interventions like the Primary School Reading Improvement Programme (PSRIP). One respondent noted, "Everything we've learned has culminated in what we believe is the best version of a structured learning programme, as seen in the PSRIP home language programme." The takeaway is that successful pilot programmes can inform and refine national interventions.

Similarly, the EGRS influenced evaluation models in Funda Wande and Limpopo literacy initiatives. One respondent noted, "Like all of Funda Wande's RCTs, we were looking to the EGRS RCTs and saying, 'Okay, we want to do a similar type, a similar style, but more intensive.' Or in Limpopo, it was like, using teaching assistants, or having a higher ratio of coaches, or whatever it is, but it was an explicit reference point for the Funda Wande work." The key lesson is that evidence-based programmes can serve as blueprints for scaling up interventions in new contexts.

Additionally, the approach of continuously using action research to improve the programme was applied in the design of literacy interventions. One interviewee remarked, "We kept changing and evolving EGRS as we got feedback, leading to the development of more effective structured learning programmes." The programme

also raised awareness of the sector's foundational literacy, which shapes policy discussions and national curriculum. One respondent pointed out, "We picked up a lot of mistakes in the conceptualisation of home language approaches to teaching literacy at the Foundation Phase and professionally corrected them." Through these contributions, the EGRS played a role in fine-tuning and scaling up literacy programmes to make them relevant to the national education goals.

A more in-depth discussion on how EGRS findings have influenced broader literacy programmes and policies is represented in Section 4.4, below.

4.3.2 Evaluation lessons

The EGRS series helped to identify the most effective way of assessing and enhancing foundational literacy programmes. These lessons underlined the significance of combining rigorous scientific approaches with a practical and flexible approach that responds to real needs and issues.

Balancing rigorous methods with practicality in evaluation

The use of Randomized Controlled Trials (RCTs) as the primary evaluation method for the EGRS sparked varied responses from different stakeholders. The RCMED and funders largely favoured the use of RCTs, emphasising their credibility and the ability to provide clear, data-driven evidence of programme effectiveness. A funder highlighted this sentiment, stating, "The credibility of an RCT helps convince funders and policymakers because it is hard to argue against the results when the methodology is so robust." From their perspective, RCTs played a crucial role in securing investment and ensuring that literacy interventions were backed by empirical evidence.

However, among implementing partners and researchers, there was notable scepticism about the limitations of RCTs. Many felt that, while RCTs provided strong causal inference, they failed to capture the full complexity of real-world classroom environments. One programme implementer noted, "RCTs don't always capture the complexity of real-world contexts, highlighting the need for complementary approaches." Another concern raised was the ethical implications of control groups, where some educators were deliberately excluded from potentially beneficial interventions. This concern was echoed by a researcher who remarked, "It's difficult to justify withholding support from schools that might desperately need it just to maintain the integrity of the evaluation design."

Despite these critiques, stakeholders agreed that RCTs remained valuable when paired with qualitative research. The EGRS used qualitative interviews and case studies to complement the quantitative data, allowing for a more nuanced understanding of why certain interventions succeeded or failed. One government official acknowledged this approach as beneficial, stating, "We learned so much from statistical and qualitative feedback; it allowed us to adapt as we implemented." The key lesson from this experience is that rigorous evaluation methods must be supplemented with qualitative insights to provide a holistic understanding of programme impact while maintaining adaptability to real-world conditions.

The EGRS highlighted that research must be embedded in decision-making structures to be effective. While RCTs provided rigorous evidence, respondents noted that policy adoption was often slow. One provincial official stated, "Research findings inform our work, but we have to align them with national and provincial education strategies, which takes time." The key takeaway is that fast-tracking research integration into policy requires structured engagement mechanisms.

Funders and implementers emphasised the importance of digestible research outputs. One funder remarked, "If findings are locked away in academic reports, they won't be acted upon. We need digestible summaries

and direct engagement with decision-makers." A critical lesson is that evidence dissemination must be tailored for policymakers and practitioners to enable practical application.

Adapting to local needs

An essential lesson from EGRS was that contextual adaptation is key. Early interventions focused on English First Additional Language (EFAL), but later findings showed that this approach negatively impacted home language literacy development. A shift toward biliteracy helped address this gap. A provincial official noted, "The move to biliteracy was necessary; it better addressed learners' needs and was a more culturally appropriate approach." The takeaway lesson is that literacy interventions should be aligned with local linguistic and cultural realities.

Another challenge was the direct application of Western-based literacy models to African languages. A language expert warned, "You cannot translate African languages from another language; it's going to be a disaster." The key takeaway is that literacy frameworks must be developed in, and for, the languages they are intended to support.

Dissemination of results

Making research accessible and actionable was another significant lesson. Policymakers and implementers noted that complex research findings were often difficult to interpret. One policy- maker shared, "Clear, actionable insights helped bridge the gap between evidence and policy implementation." The takeaway is that effective dissemination strategies must translate research into policy-friendly formats.

To enhance accessibility, EGRS results were shared in stakeholder workshops, national conferences, and structured dialogues with government officials. A programme implementer observed, "Engaging the stakeholders in discussions ensures that findings are well understood and applied." The lesson here is that active engagement ensures that findings do not only remain in reports but lead to real policy action.

4.4 What has the influence and impact of these studies been?

This section explores the indirect and direct ways that the EGRS series has had impact and influence, according to themes identified in the interview transcripts. The Early Grade Reading Studies series (including EGRS I, EGRS II and the EGRP) has been impactful in both the South African space and in the broader, international education space in a variety of direct and indirect ways; the perceived influence of this series of studies seems to be shaped by different actors' positionality within the education and development space. One of the stakeholders interviewed was asked if he had an idea of the response, generally, to these studies. He replied, "I had, uh, I must say that…would be very, very individual. So, it depends on who one spoke to." Essentially, a variety of different perspectives, perceptions and opinions exists about the RCMED and the EGRS among key stake-holders. The findings below illustrate the variety of different, individual responses to the EGRS series, and attempt to outline the ways in which these studies have influenced and impacted the education space.

4.4.1 Establishing and building a larger body of evidence

South Africa

Firstly, some of the respondents noted the importance of situating the EGRS series into the larger trajectory of educational research in South Africa and beyond. As one researcher noted, these studies did not pop out of nowhere. Instead, they were part of a larger research trajectory: "There was a precursor to these studies…

the first important study done, undertaken by the department, was the catch-up study in 2014 in which [they] replicated the catch-up programme that was developed for the GPLMS in Gauteng…where the Gauteng department was given permission to suspend the curriculum, which is really important." A second South African researcher also referenced the reading catch-up study (RCUP) as an important precursor to the EGRS series, explaining:

Well, the sort of precursor to the EGRS studies was that study in KZN, and I can't remember [what] it's called, but I remember it was really great, because they, they had [a] treatment and control, and they showed that they were – I can't remember exactly – I'm not going to get all the numbers right… but they showed that there was sort of a similar improvement in the control and the treatment, and so they… they kind of emphasised the importance of having a control. And I think that they went a long way to educate people in what it means to have a control trial. And I think that that was really important, because I think it was one of the first in education in South Africa. But a lot of energy was put into explaining, educating. So, I think that's what struck me about that. That they didn't actually find an effect, but they used it to do this work on informing and educating researchers and policy makers around the importance of randomized control trials in education.

It is not situating these studies within a research timeline that seems to be important. Rather, it seems important to understand the EGRS series in the context of a broader research agenda, because their influence is not just as an isolated set of studies, but as important pieces of evidence in a larger body of research, both locally and internationally. As one of the South African respondents explained:

In many respects, the catch-up programme, and, really before that, the GPLMS studies, [were] the start of a series of studies that essentially went beyond just single studies to establish a body of knowledge where we were able to make substantial policy claims. So, if you have a single study in say Gauteng or in [KZN], there are always questions about transfer…or replication. Will a particular intervention with a particular dosage work in another context? Well, clearly in the case of the [RCUP], the answer was no. In the case of the basic formulation of the EGRS model, the triple cocktail with structured pedagogy, we were able to show consistently in multiple studies over time, using pretty much exactly the same materials, the same types of coaching, that there's consistent evidence of its impact.

Indeed, one of the positive impacts cited by multiple South African researchers was that the EGRS series helped to establish a rigorous, South African evidence base of "what works" - and that this should be what is informing what happens on the ground. On a basic level, one respondent explained, "There's now a recognition that, although it's not always followed through, but that we need to do proper research. You can't just think about something and believe that it's going to work." Beyond just the need for evidence-informed decision making, one researcher expanded, "I think on the positive impacts, I think it sort of drew a new line in terms of the quality of education research and collecting primary data at scale in a rigorous way. I think that it sort of created a new benchmark of what quality causal research looks like in South Africa." Another reflected this sentiment, noting: "The positive impacts are definitely, you know… It's really important to have that as a national evidence base, rather than having to refer to what PIRLS is telling you about your system." The EGRS series is perceived not only to have influenced the standard for quality of research in South Africa, but also helped provide a strong foundation for establishing a national evidence base – conducted by South Africans for use in the South African system.

Internationally

Respondents not only cited the EGRS series as important for establishing a domestic body of evidence; international respondents noted that the EGRS series also helped to strengthen the body of knowledge around structured pedagogy as an intervention model internationally, and particularly in the global South.

For example, the EGRS series was conducted at roughly the same time as the Tusome interventions in Kenya were generating interest in the efficacy of structured pedagogical interventions. Interestingly, despite the fact that the EGRS intervention design was modelled after the Tusome pilot design, those interviewed for the present study did not seem overly concerned with the exact implementation timeline of these studies. Rather, interviewees tended to discuss these studies as if they occurred simultaneously – working towards the same goal. This kind of sentiment was reflected by one researcher, who remarked, "I think this has been an enormously influential and positive sort of research programme in terms of the international sphere. I mean, honestly, I would be interested to see… I wouldn't be surprised if this work influenced some of the coaching that was part of the … programme in East Africa? I'm not sure on, like, the timing because these things were happening at similar times, but I wouldn't be surprised." Here, we can see the extent to which respondents and researchers connect the Tusome studies from Kenya with the EGRS series as they worked to strengthen and reinforce each other.

As per the discussion above, the influence of the EGRS series is likely to be stronger precisely because the findings are not isolated, but rather, part of an effort to build a larger body of knowledge for researchers, practitioners and policymakers to reference and lean on. As one international researcher explained:

I think we used to be in a place where early-grade reading, foundational literacy, numeracy, foundational learning, whatever the topic, whatever you call it, that this was like an area that didn't have a lot of evidence. I think now most of the conversations I've had recently are like, 'Oh, there's so much we know about how to improve learning.' And I think EGRS has been a big part of that shift from we don't know [what] we're doing, to now, we know. [It] doesn't mean it's going to work in every single context, but we do know, in general, the contours of what's needed to improve learning on these – both literacy and numeracy in low- and middle-income countries. I think the EGRS has been part of that.

As part of this larger body of international evidence, the EGRS series is not only cited and promoted by researchers who worked on the studies. Instead, these studies are utilised to influence the international education sector in a variety of ways. This has come directly from formal citations by other researchers, but the more significant influence from these studies is likely more indirect and fluid than simply citations in other papers. As one respondent stated:

I treat the EGRS papers, regardless of what I mean – which one is I or II – as if they're part of the broader sector's evidence. So, there probably hasn't been a presentation that I've given, at least in my previous role, that we didn't cite at least one of these papers as kind of, you know, what we know about how coaching works, what we know about [how] literacy in the first language works.

In other words, while the studies may have some impact on their own, as isolated interventions, their impact on the sector is likely significantly strengthened because they are viewed as part of a greater body of rigorous quantitative data, gathered through RCTs, around the kinds of interventions that can work to shift learning outcomes in classrooms across the Global South.

Intervention Design and Research Questions

As further evidence that researchers both in South Africa and beyond value the EGRS series as part of the broader sector's evidence, two researchers discussed how the EGRS series directly shaped the questions they asked in their own work, and the design of subsequent interventions. For example, one respondent explained:

[Our study] morphed into, like, a 60-school RCT [programme] kind of modelled on EGRS, and that's why we went with coaching. And the findings from EGRS also featured into this, because the EGRS results showed that there was no impact in rural schools, so we didn't pick any rural schools for [our intervention]; we only picked urban, no fee schools in townships…you might even find in [our] early reports, we even mentioned EGRS specifically. But yes, like, for example, the reason why we didn't sample rural schools was because of the EGRS findings.

A second respondent explained how the EGRS II study design influenced the iterations of intervention design in Kenya:

I think I would just be frank that having EGRS II testing in-person coaching versus virtual coaching, and having a rigorous study done by careful researchers meant that we didn't have to try that comparison – understanding that, of course, Kenya and East Africa is different than South Africa, but given the scarce resources, let's at least try some different research questions.

Despite the differing contexts, both researchers' work addresses similar overarching questions, contributing to one body of knowledge. This underscores the value of researchers across various contexts exploring the same kinds of questions using comparable intervention designs. Such an approach can potentially provide a more comprehensive and nuanced understanding of what works to shift learning outcomes – ultimately having greater impact and influence.

A desire for additional research

While respondents acknowledged that the EGRS series had successfully established and built evidence around effective educational intervention design, respondents also indicated that more research would be helpful. Multiple interviewees indicated that, if they could change or add anything to the EGRS series, it would be to conduct more studies, and answer additional research questions. As one researcher highlighted this sentiment by saying, "I mean, you know I would keep getting more of them. I think this is, you know, I think they've just been incredibly influential," and another echoed this perspective: "I think, you know, [in] the ideal world there would be EGRS 1-2-3-4, because I do think there are some outstanding research questions that we need answers on." This is in contrast to some of the views expressed from within the DBE, as presented with the Question 1 findings, that the RCMED has spent too much time focusing on just one topic, and has neglected other research priorities in the process.

A third respondent elaborated on the broader impact of stimulating further research, explaining, "You know that would be another outcome of what happens at the DBE, like, you want to stimulate stuff, stimulate the people that do research, that do research in education, to work on reading, to answer more of the questions, to produce more evidence to kind of increase the breadth of the depth of the evidence base. So, we've got work to do there."

While, of course, more research is almost always desirable, one respondent noted the significance of the work completed through the RCMED, “Yeah. I mean, it’s easy to say that [they] should have done more work but I do think being able to have this kind of unit with the ability to identify key research questions and then pursue them… that doesn’t happen very often.” In other words, while there are always more questions to be answered, it is critical to also acknowledge the contribution of the EGRS series to the larger body of knowledge in the field.

4.4.2 Local and international perceptions

International feelings and thoughts

When asked their general feelings about the EGRS series, one international respondent replied, “I think the project has been… I love it. I think it’s been incredibly helpful for the world”. Another respondent echoed this sentiment, remarking, “I might be biased, but they’re incredible. The impact they’ve had – and this is something maybe I can speak less to the domestic policy impact – but the impact that they’ve had globally is huge”. From an international perspective, it seems, the response has been positive and the impact has been broad.

One respondent commented on the global influence of the studies:
I think the range of provinces that have been tested in South Africa with these rigorous kinds of RCTs is pretty impressive. And I think in some ways we talk about it more externally to South Africa than… until recently, South Africa has talked about it internally. That said, there have been all those indabas and other meetings; I got invited to a couple where provincial level leaders were connecting with the researchers to, you know, discuss what the implications are for policy. But I think external to South Africa, we’ve seen a lot of countries cite that evidence for why they’re about to scale up interventions.

In this respondent’s opinion, the impact of the EGRS studies has been greater outside of South Africa than within. It is critical to try to understand why these studies may have had more attention, more appeal and more impact internationally than locally to date.

Local feelings and thoughts

While South African respondents’ feelings about the EGRS series were, overall, quite positive, the responses were a bit more tempered and, in some cases, negative. As one South African respondent noted, “Some have responded positively; some have responded not so positively. Those who have responded positively believe that structured learning programmes will contribute in improving literacy and numeracy, and then we have those who are arguing that it takes away that teacher professionalism and autonomy.” While these aren’t the only criticisms leveraged against the EGRS in a local context, this quotation indicates a divide present in the sector.

On the positive side, one respondent summarised, “I think the impact is based on the quality of the research. That’s the first impact, because it’s high-quality research, I think that that is the basis for impact. I think the second impact is that it’s been within the DBE, and I think it’s important that the DBE shows leadership.” Another respondent reflected on the quality of research as a basis for influence, stating:

I think that the EGRS programme is quite unique in its engagement with academics and with researchers in rolling out its programme. Well, I don’t know how unique it is, but there’s really robust research, you know, that’s been done around the EGRS, and they’ve obviously taken the academic side of it very, very seriously…

And the other thing that I think is really unusual and great about the EGRS is that it's been a sustained project, so it's been through multiple iterations and, through this process of research, tried to identify what kind of components [work] and explored and been quite open. So, at one stage…they found that the improvements had led to a radical decline in English performance or something like that. Anyway, but, but there was [a] kind of openness to exploring issues as they've arrived in other parts of the research. And, yeah, I think that kind of working at the boundaries, or working at the confluence of developing policy of implementing and doing research, and having a close a relatively hot circuit around that has really made it, I think, quite an extraordinary unit.

On the negative side, there are a few common criticisms that seem to be made against the EGRS series. Beyond arguments around teacher professionalism and autonomy, there are criticisms made about the primacy of RCTs and the absence of local context and cultural specificity, and the teaching methodologies used in the structured learning materials. From the data collected for this study, South African educationalists seem to have the most negative responses to the studies, while South Africans working for large, internationally funded organisations seemed to express feelings more similar to the study's international respondents.

One of the interviewees summarised one set of criticism – a well known critique from the group known as BuaLit:

The one [response] came from a group in Cape Town called the BuaLit, which [was] critical of the research methodology. They were critical of the findings. They were critical of the nature of the group that undertook the research, and they made some very valid criticisms of EGRS, possibly the most important, which was that the EGRS focused predominantly on the skills of teaching reading and didn't put sufficient emphasis on the habit of reading or the teaching [of] independent reading.

Another respondent, a South African educationalist and researcher, summarised their own criticism for the EGRS:

I think it sets up sort of false choices between supporting home languages and supporting EFAL and what I mean by that is that the home language literacy is clearly the biggest driver of learning outcomes, so that is going to be resourced, understood, and so on. And I think also part of the problem is that even EGRS I, I think, it had design problems. [And] by design problems, I mean in terms of [the] actual intervention itself. And that's not the problem, really, of the designers, but it's also just the problem of poorly developed pedagogy [for] teaching reading [in] African Languages at the time. And especially, I think at the time, it was very, very poorly developed. So even the materials that were used and so on, they were basically using methodologies that were translated from English, essentially. So, in other words, …if they had used methodologies that followed the linguistic logic of those languages, I think you would have had…much greater impact even, you know?

A third respondent explained, "I take a critical… but although I'm supportive, I'm also very critical of it. So, my first point is that the evidence base for structured pedagogy is actually very… it's not very strong. Like there's a lot of enthusiasm for it, and all of the economists love it, and they jump. But when you really dig around and look at what evidence in terms of impact on reading scores there is, it is actually quite thin."

While critiques may be both valid and important in a rigorous research environment, these comments stand in contrast to some international respondents, who had a hard time even understanding what negative sides of the EGRS series there could be. For example, one interviewee quipped, "As far as negatives go, I'm really curious what people would say. I have to read the report to see what they'll say." Another researcher similarly expressed confusion, responding to the question, "I really don't [see any negatives]... you should talk to somebody else [who] is negative about this… from my side, I'm really finding [it] hard to think of any shortcomings."

4.4.3 Increased focus on early-grade reading

Many of the South African respondents – even some of the EGRS' critics – cited heightened attention on early-grade or Foundation Phase (FP) reading as a significant positive consequence of the EGRS research conducted. As one researcher summarised, "I think, what it assisted in is the bigger focus on reading and in the Foundation Phase, so that, I think, has been very, very useful." Another respondent elaborated on this impact, highlighting the sustained focus on early- grade reading: "I mean, I think one of the things that came from that almost constant focus for the last 10 years is that it has to be a focus for us as government...And so, I think one of the good things about EGRS is that it kind of kept the focus on early-grade reading."

Beyond simply raising awareness, the EGRS papers have also served to expose systemic challenges in early-grade learning. One researcher noted, "[The EGRS series has] showcased the real challenges in the early-grade space. There had not been any systematic studies of early grade learning and just the kind of administration of the EGRA, and EGMA, particularly EGRA, or the version of the EGRA, has showcased that not just is there a problem in Grade four, but there's a problem in Grade one. And I think there's now wide recognition that that's a challenge. And so that's very positive."

This intensified focus on early-grade reading has had tangible implications at the classroom level. One researcher explained, "I think the positive impact is that they have brought structure, more structure, to early-grade reading classrooms and more text. So, the idea that reading classrooms happen around text, I mean, you think that's obvious, but I mean, we had very oral text lists [in] classrooms for a long time. So, I think that that's been a big positive impact."

Moreover, the research seems to have had an influence on broader literacy initiatives and policy priorities. One participant, a known critic of the EGRS, remarked, "I think the positive is actually…
- I think they have also helped to focus attention of funders and policy-makers on supporting literacy development in the Foundation Phase, whether it be improving the quality of teacher education [and] materials development. I mean Zenex, for example, established a huge project that I was part of, of developing graded readers in all African languages, for example."

While the EGRS as a full intervention has yet to be implemented at a large scale, there are certain lessons and practices from the EGRS series that have slowly been adopted across projects and provinces. One respondent articulated this as follows:

So, in terms of the positive impact, I think it's quite impactful that those findings have really been – or the series itself – has been used to influence a greater scaling up of good practices. So, take, for instance, the key ingredients that make up a good reading literacy programme that…has been kind of confirmed and affirmed through the study, that these are the things that you need: You need to have the right LTSM pitched at the right level. You need to have the teachers trained and supported in pedagogy. You need to have the teachers that [are], kind of, given a kind of a frame or a blueprint that helps them and makes their work and their load lighter.

The EGRS findings – and discussions about those findings – seem to have contributed to knowledge filtering through the education sector, even where formal projects have not yet been scaled. One respondent remarked:

It puts on the table the early-grade crisis and the importance and urgency of doing it. It put on the table the potential to improve learning outcomes at the early grades. It puts on the table the notion of evidence and evidence-based ways of doing things, and it actually describes a model that could work. In other words, the triple cocktail, structured learning that could work and is now spreading slowly over to different projects, different provinces, etc.

Ultimately, because the EGRS has both built up the body of evidence around "what works" in education change and contributed to knowledge around early-grade learning and literacy, the studies have opened up and driven conversations around reading.

I think positively, it really was the first time there was a real study on an approach to the teaching of reading in the Foundation Phase using the triple cocktail model…and that really made the basic education sector and the higher education sector think about the importance of reading in schools, but also the importance of teachers and the support that teachers require in the teaching of reading. And I think it ultimately then brought us to the point where we are now, which started to emphasise the role of reading and teaching of reading in African languages, in the home language of the child in the Foundation Phase. And I think that is quite positive, and I think it's very important. Need for similar focus on early grade maths / numeracy

While respondents noted the critical contribution of the EGRS series in building a strong evidence- base around structured pedagogical intervention and bringing needed attention to early-grade reading, a few respondents also pointed out an unintended negative consequence of the strong focus on establishing "what works" for early graded reading: an imbalance between what is known about literacy versus numeracy.

One respondent stated, "I think that we're not focusing enough on maths. I think that there's way too much… not too much… the relative priority of literacy and maths is, for lots of reasons… the World Bank looks at it, USAID has dominated the field and crowded people in that direction… but there's way more attention on literacy than there is for maths." Another respondent reflected, "What I worry about at this point – and this is not a fault of the work on reading – is that there is a very stark imbalance between the work on reading and the work on numeracy. It's very lopsided. Now, given that these are skills that are taught by the same people in the same classrooms, we've got a problem."

Looking forward, another respondent argued the need for establishing an evidence-base for numeracy that is as robust as the body of literacy for reading:

I think that we need to do the same thing that we've done in literacy and reading for numeracy and math. I just think this is incredibly important. And you know, when we talk about it, there's a little bit of hand-waving. Like, if you get literacy down, everything else takes care of itself. And I think that might be partly true. It might even be mostly true, but I actually haven't seen a lot of evidence that demonstrates it. And so, it's, you know, kind of, I think it's mostly a hypothetical. Yes, we see kids who learn to read better, do better subsequently on lots of other things. But there's a lot of issues with that literature in that, you know, there are a lot of differences between those kids…So I do think that sort of early-grade numeracy is like an essential next thing to do, for that is what this study and the Kenya studies and the India studies have done for really great literacy.

4.4.4 Coaching: Effective, but an Achilles heel

Multiple respondents pointed out that the EGRS series demonstrated that teacher-coaching can be a highly effective intervention component for improving learning outcomes, particularly in early- grade reading. However, while this finding was both significant and robust in each iteration of the EGRS, the coaching element of the EGRS also seems to present a major barrier for scaling up in the South African system. While the findings of the EGRS I programme generated significant interest and excitement, both domestically and internationally, coaching has not been widely implemented within the South African context. According to the present study's respondents, the barriers to scaling seem to include political feasibility, resource allocation challenges, and competing priorities.

Inspiring interest and excitement

From the perspective of several respondents, internationally, the EGRS findings on coaching were met with considerable enthusiasm. While coaching was viewed as an effective strategy for improving instructional practices in places like the United States, EGRS I demonstrated that coaching could potentially be effective in lower income contexts as well.

When asked to recall their initial reaction to the EGRS findings, one of the international respondents said, "I would say, you know, at the World Bank, I think the first study really led me to be something of an advocate for teacher coaching early on." From this respondent's perspective, this kind of advocacy was likely influential in the development of the World Bank's 'Coach' initiative, and for their general promotion of teacher-coaching globally. The same respondent went on to explain:

The [EGRS I] programme came out not too far off around a time that Matthew Kraft and others published a meta-analysis of coaching studies in the United States. And so, there was, I think… around that time there was a little bit of, like, a vibe around, like, hey, coaching could be amazing. But honestly, I started talking about coaching at the World Bank and at that point…the Global Director of Education at the World Bank – and I think he did a fabulous job – but his initial kind of response was like, "Look, there's just no way we can do this in a low- or middle-income country…" [and] I think this study was a very powerful counterweight to that for dialogue at the World Bank.

Another respondent emphasised the global impact of the findings, noting that they are frequently cited and discussed in leading international institutions, explaining, "Like, [the] paper on coaching versus training, it's like cited, like all over the World Bank… people talk about it and, you know, so often I talk to somebody, and they're like, 'Yeah, I love that paper, I talk about it all the time!' And so it's really had a massive global impact, and the evidence that it's produced…I think it's been incredibly influential." In summary, the EGRS I findings seem to have been used to show that teacher coaching is not only a viable option for improving learning outcomes in high-income country contexts, but is a professional development strategy that can be effective in a variety of different contexts.

Domestically, the EGRS findings also generated interest. One South African researcher expressed, "I think the coaching idea got quite a lot of interest. So Funda Wande, for instance, through their coaching models, have also tried to do something of that sort. And to some extent, there was a question of who can you use as coaches." While organisations like Funda Wande may have taken note of the efficacy of coaching and potentially utilised these findings to shape subsequent research questions (for example, can teaching assistants be a successful alternative teacher-support model), there seems to have been less excitement at other levels of the South African system.

In South Africa, barriers to coaching

Despite the demonstrated efficacy of coaching in the EGRS series (and in the literature more broadly), several respondents indicated that both systemic and political factors have hindered its widespread implementation in South Africa. While there seems to be quite an appetite for exploring teacher-coaching in other contexts, in South Africa this hasn't necessarily been the case. One government respondent revealed:

And again, the findings on coaching, the department had quickly dismissed. You know, the previous Minister said [that] coaching is not sustainable. 'You know, we can't afford it – [it] sounds like a good idea, and it certainly has worked in many countries, and especially in developing country contexts where there [are] affordable teachers' assistants and things like that. But, yeah, it's not going to work.' So… Yeah, I don't know whether she said it officially. She certainly said it.

This quotation shows a specific policy stance on coaching through its swift dismissal, despite the evidence of its efficacy (the same evidence that generated excitement). It seems, from this respondent's view, there wasn't a significant effort by the government to explore how coaching *might* work in the South African system, but rather that it was not considered viable from the outset.

Another government interviewee who is heavily involved with the Primary School Reading Improvement Programme (PSRIP), a scaled-up version of the EGRS II EFAL intervention that utilised structured learning materials, training, and subject advisors as teacher support, asserted that it is the coaching that is difficult to scale; the other components of structured pedagogical interventions (lesson plans, learning resources, training) have gained more traction at scale. The interviewee explained:

The EGRS employed a particular methodology, and [made] sure that there is methodology training. So, in terms of pedagogy, that you give the correct pedagogy to the teacher, you then script what the teacher will do through lesson planning, and then provide, as well, a suite of resources that support that and that those would be the key ingredients for a successful reading literacy programme. Of course, you provide a coach, but we know that the coach is really the biggest Achilles heel for the system.

One interview outlined the challenges, summarising some of the bureaucratic and systemic barriers to implementing coaching at scale in the South African system:

I think it is interesting that, okay, we've got a lot of strong evidence that coaching improves learning outcomes and that other approaches either don't or do it to a much lesser extent, but because coaches are not in the basket of posts or in the post-provisioning norms, the PPN, like subject advisors are, or heads of department or teachers, coaches would need to be like… it's a whole new category of personnel that would need to be [initiated]. And I think that leap is just… no one has ever been passionate or cared enough about this to do it since GPLMS. So, I think increasingly, even though there's a lot of evidence about this, everyone is like, 'Okay, that's great.' But, like, you know, people only ever do this for 50 schools or 100 schools. Like, even in the Northern Cape at the moment where they're doing it, like, it's 60 schools, or 100 schools or something, it's tiny. And if you wanted to do a bigger rollout, it would probably need to be a version of like centralised training, or these teaching assistants, or other modalities of teacher support or learner support, other than coaching, because coaching is really expensive, and I think a lot of people… Everyone's like, it's too expensive to the extent that [it's] not even worth considering it as an option...I would say we don't have any examples of government appetite at the provincial and national level to do this. And that's over the last seven years. There's been no province that's like, okay, cool, let's throw 500 million rand at coaches...I think the reason for that is

that there's like a trade-off between feasibility and cost, [and] evidence and [there] is like an unholy alliance between cost, research, political feasibility, like all of those different things, which is the reason why they're willing to spend 16 billion rand, or whatever it is, on teaching assistants, which is way more than you would need to spend if you were spending that money on coaching… But the politics aligns for teaching assistants in a way that it doesn't for coaches.

Alternatives and iterations of coaching

While the EGRS I clearly demonstrated the efficacy of one-on-one coaching over more traditional teacher-training models, EGRS II and the EGRP studies have tested adaptations with an aim to address systemic challenges while still leveraging elements of coaching. Unfortunately, the alternative models of coaching tested in the EGRS series – virtual coaching and training department heads to carry out the task of coaching – did not show significant impact on learning outcomes.

There has been some interest in using actors who are already within the system as instructional coaches. However, despite the fact that actors like subject advisors might be formally responsible for coaching, respondents acknowledged that using subject advisors or other actors already in the system would require major changes to the system, and there doesn't seem to be much
appetite for this. As one government official noted:

One of the key components or ingredients of EGRS has been the appointment of coaches, and I think it's one that has been less successful because of many issues around just the sustainability of that model, because you have to bring in coaches, and coaches are expensive and all of that. And I think it was really from the point of view of just it being resource heavy, it didn't take off at all, even with the provinces. So, they also did [an] experiment with a virtual coach, or with virtual coaches, or a virtual coach component, and I think that the results were not as strong, obviously, as when compared to a physical coach…There's [also] been a coaching course that has been developed…and we enrolled a few subject advisors to see if they can take up the role of coaching. But even that, it would have to be some kind of a system overhaul, because we know that they are currently so swamped with a subject advisory service that for us to repurpose either them or repurpose perhaps our heads of department in schools, what are they called. I think they are called SMTs – something like that – senior management teams in schools, we would have to really do a lot of rethinking the rules and overhaul the system.

Another respondent also discussed challenges to building system-capacity for teacher- coaching, despite the presence of individuals like subject advisors who, in theory, many believe should be able to carry out a teacher-coaching and support function. This respondent explained:

Yeah, so [a colleague] once diplomatically stated, you know that you know, there are ward?…district? education officials—I don't know what they're officially called—you know, who, in principle, could be, you know, could be providing this kind of support. But they're not necessarily motivated. Like, yeah, the incentives aren't necessarily aligned with [coaching], they're not necessarily receiving the training and so—and anything that needs more resources—so, like, the people who could be doing it maybe don't have the time and the expertise and incentives to do it properly and putting in more money, even, even if it's like not that much, it's just like, never feasible. You know, for them to, like, hire some more people to do this, it's just like, they'll never do that, like they'll spend money on teacher salaries. So, I think, I think there's kind of a pure political incentive to think more about being very strategic in how you train and capacitate teachers. So, I think it's the individuals who are employed and there are political incentives not to invest in that, you know?

While finding actors who can effectively provide support to teachers is a challenge, there still seems to be some effort to do this. For example, the current EGRP being conducted in the Northern Cape is exploring the use of department heads again, trouble-shooting some of the lessons learnt in EGRP I. And, Funda Wande's use of teaching assistants as support may hold some promise for future interventions as well.

Coaching—what's next?

A few respondents expressed disappointment regarding the failure of coaching to gain traction in the system. While most respondents did not identify any negative consequences of the EGRS series, some cited challenges related to coaching. One respondent remarked:

Officials and people in the sector were very disappointed that we are unable to implement coaching because of the cost associated with the intervention. I was equally disappointed that we can't go and implement this because it was going to help us a great deal. I think we could be talking about something, you know, vastly different from even learning outcomes that you are still struggling with at the moment, in terms of reading, we could be very far. That's the only negative thing that I could think of, but not about the outcomes of the research.

Another respondent noted, "Downsides, no, I don't really see there are any major downsides from EGRS. The only one which is not even really a downside is… I wonder whether or not we haven't focused on coaching for too long, when it's not a viable, scalable option, as opposed to, like, if we had branched out and done more. But even that, I think, is quite a weak critique."

Despite strong evidence supporting coaching as an effective intervention component, its scalability seems to have been hindered due to both systemic and political barriers. This reflects a broader tension between evidence-based policy-making and practical feasibility. One respondent summarised this tension, saying: "You know, policy is only as good as it's implemented. And if it's not implemented, you know… we have to find ways to develop things that are implementable, rather than to try and keep hammering at something that we know works, but there seems to be very little political appetite or policy appetite [for]." In other words, exploring sustainable and scalable alternatives remains critical for addressing the foundational literacy challenges highlighted by the EGRS.

While there are strong and robust findings on the efficacy of coaching, there is a need to explore sustainable and scalable alternatives for teacher-support in the context of structured pedagogy. Perhaps support from external funders could help close the gap and assist provinces to implement the full intervention model at scale.

4.5 The advantages and disadvantages of an embedded Edlab

One of the themes which emerged from the data, centred around collaboration versus independence. This theme begs consideration of the question: Is independence or collaboration more effective in shaping impact and influence? What does this mean for a government- embedded Edlab? How might different actors in the sector conceptualise independence versus collaboration in the context of impact and influence? This section explores respondents' perceptions to try to gain insight into these questions.

Individuals' influence

A common thread in the data was the significant role played by individuals within the RCMED in shaping its influence. Many respondents praised the expertise and dedication of the researchers, often mentioning them by name and citing their credentials as key to the EGRS series' success. This suggests that the RCMED's im-

pact is heavily dependent on the people within it rather than structural or institutional factors. One interviewee summed up this sentiment, stating, “I think it is people dependent…I don’t think it’s very easily replicable. I think it was very much contingent on those individuals and you know, both their capacity and patience in building it up internally, and also their capacity to bring in their credibility as researchers.”

Beyond academic credentials, another respondent pointed to personal values and work ethic as crucial factors that enable the individuals at the RCMED to sustain high-quality work within the constraints of government. Based on personal experience working with these individuals, the respondent remarked:

I genuinely do think that, like, the ability to withstand some of the vagaries of government, and like, you know, being looked over for promotion, or the types of just that stupid [stuff] that you have to deal with when you work with government if you’re a competent person, I think that, if you’ve got this additional religious work ethic, and whatever you want to call it, all of those things that are associated with [that], I think it would be interesting to get them to reflect on that and say, you know how much of this is about you hav[ing] a shared mission, these are about your personal values and, like, your own religious beliefs, and to what extent do those, like, factor into this? But, I do think that there’s almost like a high- performance culture in RCMED, where, because you’ve got all of these other colleagues that are around you that are hard-working, competent, like, you know, then, if we need to get something done and it’s, like, Friday and it’s 5pm, they don’t just say, ‘Okay, bye, let’s come back to this on Monday.’

While the questions posed here by the respondent remain open, they showcase some of the values and beliefs individuals working in the RCMED are perceived to have —and are perceived to be necessary to the unit’s success.

A third respondent described a significant potential weakness of government-led research; namely, that the government has the ability to suppress the findings of research conducted from within. Therefore, for a government-led research unit to be seen as credible, there may be a stronger need for the individuals within to be viewed as having high integrity. This could help ensure that findings coming from within the unit are viewed as legitimate:

Some people don’t like [government-led research] because there’s, you know,… there is a conflict of interest in the sense that, you could imagine, you know,… there is an incentive for the people in the government agency to not show their results – that their programmes don’t work. Now obviously we saw with the second study [EGRS II] the longer term results, the results are not super impressive. And so, we learned a lot from them. They’re very important. So, I think in this case, I’m not worried about conflict of interest. But I think there is a conflict of interest. It’s just when you have principled researchers in the driver’s seat that becomes less of an issue.

Here, we see another example of respondents’ perceptions that personal integrity is important, along with formal academic skills, for the credibility of units like the RCMED and studies like the EGRS.

Essentially, a high level of commitment, alongside a culture of excellence and integrity, appears to play a fundamental role in the credibility and effectiveness of the RCMED’s work. Naturally, this dependency on individuals raises concerns about sustainability: if the RCMED’s influence is tied so closely to specific individuals, what happens when they leave? It remains to be seen how sustainable the RCMED is beyond the individuals who are there.

Proximity to government: Outsiders' perspectives and perceptions

This section explores perspectives on government-led research, particularly the view that such research is highly desirable because of its proximity to policy-making and thus, its potential to influence policy. Respondents emphasised that, when high-calibre researchers operate within government structures, they can shape the research agenda so that it is responsive to questions the system needs to answer and ensure that findings directly inform decision-making. Based on the findings more broadly in this report, this view is somewhat simplistic and not always reflected in practice.

Multiple respondents, particularly funders and academics from abroad, described the desirability of government-led research. As one respondent explained, "When you've got good researchers in government and then those researchers in their government-capacity are leading the research and you get this perfect spot where, you're answering the right questions and you're answering them in ways where we actually learn the things that we want to learn."

Another respondent explained:

I mean, it's what you'd want. I mean, I've talked about this model all over the world—it's like, exactly what you want. Think about it. It requires either the existing research team in your ministry to be very technically sound, or it requires, you know, hiring external people to come into the ministry, but work inside a government. Yeah, it's… to get this kind of calibre of researcher who stays in the ministry or the department, forgive me, it's just… I don't know [if] it's what you want. It's hard to have happen, but it's really what you want.

Government-led research "is really what you want", and, this unit (of stellar individuals, as described above) serves as a prime example of what a successful government-embedded Edlab might look like:

There's not that many examples [of research labs], to be honest, that have really worked like this. But I think there are several that have been trying to mimic at least parts of it. It is by far, from my point of view, it's by far, at least for this topic of improving learning, which I'm saying carefully, because I don't just mean early-grade learning, just in general, this issue of learning, this… this research group inside of the department is by… is definitely the best example of what's possible by a significant margin.

Why is a strong research team within government (or a government-embedded Edlab) desirable? Essentially, because it is perceived to have a great influence on policy. Among non-government officials interviewed for this study, there was a consensus that government-led research— especially of the quality being conducted in the South African context—is a powerful tool for influencing public policy. As one respondent plainly stated, "We need impact evaluations that inform what public policies are doing, and for that to happen, we need government to be in the driver's seat." In other words, there is a perception that for impact evaluations (and research more generally) to influence policy, it is critical for government to be "in the driver's seat".

Another respondent echoed this perception: that government-led research has an easier pathway to influence than research conducted outside of government. One interviewee explained, "I mean, it's… I think it's so powerful to have this research sitting in government because of the conversations that they have with everybody in the broader government, the relationships that they have that really enable them to influence policy. I think outsiders… their research is far less influential unless they have the same kind of relationships with government. And so, I think it's been incredibly powerful."

It is also important for the government to conduct research because, as one respondent stated, "I think it's essential that government should be doing [research]. I would have been happy if more parts of government had been working on the research side of things and trying things before… before implementing." In other words, respondents expressed that government-led research is desirable because of its ability to help generate the evidence needed to ensure policies are evidence-based. Of course, the pathway from evidence to policy and practice is not necessarily simple or linear in practice.

Despite the advantages of government-led research, some respondents acknowledged challenges. One implementer highlighted that, while the DBE has a strong research team, the impact on policy is not always immediate:

I think it's amazing, because government defines policy and policy should be informed by research. I know that the DBE has got this amazing team of people working in research who are really smart and innovative and up to speed and doing cutting-edge things, and I'm really excited about that… I think what has been just a little bit disappointing—but I understand that bureaucracy and other things take time, and the shift can take a long time—but to see any kind of influence on policy, I haven't actually felt that as a result.

This quotation reflects a broader reality—while proximity to government may facilitate influence, it does not guarantee swift policy uptake.

Government: A complex space

While many respondents seemed to view government-led research as having an easy pathway to policy influence, the reality is more nuanced. Government is a complex space, and the RCMED's position within the DBE does not necessarily guarantee that findings generated there will have a seamless or even smooth path to policy impact. This complexity becomes particularly evident when considering how officials within the DBE, but from outside the RCMED, perceive and engage with the unit.

As noted in the previous section, the RCMED's position within government is often viewed as an advantage, especially by academics and funders interviewed. However, this view wasn't limited to external actors – many government officials also acknowledged the benefit of embedding a research unit like the RCMED within government. As one former government official explained, "There's always scepticism about something coming from outside. I don't know whether it's a natural reaction or a natural inclination. There's always scepticism, or people wanting, you know, to have a second thought about something." From this perspective, the RCMED's position within government should mitigate such scepticism, allowing the research conducted there to be received with trust and credibility.

On the other hand, being an internal government unit brings unique expectations and criticisms. It is likely that misunderstandings about the RCMED's mandate contribute to tensions, particularly around agenda-setting and territorial issues, as can be seen where the RCMED's mandate to do original research is discussed in the RQ1 findings. Some government officials expressed a desire for greater collaboration in determining research priorities and ensuring alignment with the needs of other DBE units. One former official raised concerns about the RCMED's leadership in reading research:

I recall on many occasions, for example, [in] the teacher development and curriculum and management headcom subcommittee, people would raise the question, 'But why is it that the research unit is taking the lead on reading whilst in fact, this should have been a feature of the teacher development and curriculum manage-

ment in the subcommittee?' You know, looking back at it, it's, it's fine, it happened, it's, it's done, and they are continuing to do it. I would like to see perhaps a little bit stronger inter-collaboration between TDCM and the RCMED.

One respondent from a provincial research unit questioned whether the RCMED has the relationships with other branches in the DBE needed to have influence over policy. If they did, it would be the Curriculum Branch that promoted the early-grade reading findings, rather than the research unit. This person argues that the evidence-based reading policy emanating from the EGRS is not pushed to the provinces by the Curriculum Branch, but by the RCMED.

And the issue is, how do you argue for a particular approach that makes a difference? And the question is, now, the people in curriculum, are they pushing the same agenda that the people in RCMED are actually doing? Because, you know, a year in conferences, seminars, I have more and more engagement with RCMED people than with the practitioners in the line function. And so, the question that you gotta ask yourself is, how much influence does RCMED have over the line functions, actually implementing the system-wide policy?

Another government official from the national DBE outlined their view on how the RCMED would ideally set their research themes and priorities:

So, [ideally] the process would be for RCMED, for instance, to be informed by the strategic planning of the department, or whichever entity that would be perhaps wanting to do this kind of work, because from there, then the priority areas emerge. And then, [they] meet and collaborate with the key line functions that are driving those priority areas, and then [work] together, collaboratively. Then there's agreement that, yes, this is what we think is a gap in research and in data that would help us deal with this particular challenge. Then we agree. Then they kind of drive that. That's the process that I think should be followed by those who are researching, particularly to build evidence, because in this case, that is what we are, that's what RCMED is for, to generate the evidence that would help the system strengthen itself when it comes to weaknesses, [and] drive the key performance areas we have.

Both of these statements reflect an expectation of collaboration—and a frustration that this has not always been the case.

The extent to which the RCMED collaborates with other DBE units versus operating independently remains unclear, as does the potential impact of increased collaboration. Interestingly, the RCMED does report that it follows a consultative process to set their research agenda, as discussed in RQ1. However, those from outside the unit do not always seem to recognise efforts that the RCMED makes. The implications of collaboration are difficult to measure objectively. However, the comments from DBE officials raise an important question: Would the uptake of research findings improve if the RCMED engaged more closely with other government units? How might this happen more effectively in practice?

One former official emphasised their opinion that the RCMED should integrate more fully within the DBE, stating, "The challenge for me with a unit like that—and I said this to [them]—is that [they] have to find a way to work back into the DBE, and the difficulty… and I think towards the end of her term, Minister Motshekga said the same kinds of things to them, that you have to find a way to actually work with colleagues in the department."

Ultimately, while proximity to policy-making can be advantageous, it does not automatically translate into influence. Within the DBE, numerous units and stakeholders have their own agendas, interests, and priorities. Sometimes these may align with the RCMED's work, but, at other times, they may overlap or even compete, leading to tension over power and influence. In this context, relationships play a critical role. To maintain their influence, the RCMED must work to carefully navigate bureaucratic dynamics, balancing independence and collaboration without alienating key stakeholders and colleagues within the DBE more broadly.

Considering collaboration

While the desire for greater collaboration was primarily expressed by DBE officials, a couple of South African educationalists also suggested that the RCMED could engage more with experts outside of government at different stages of research projects like the EGRS. However, as noted previously, it is already the modus operandi of the RCMED to work with external experts on an as-needed basis. One educationalist argued:

I think they've got to have panels of people that work outside of government now that work with them on these things, you know, and I think there has to be a bit more discussion, I think, with people in the field about design…basically, like, at all stages of the studies: the design, the implementation, and even when they're doing the analysis of the data. I think it's… it has to be… I think it can be a bit more collaborative, I think, than it is.

The discussion here around collaboration raises an important question: To what extent does the desire to collaborate emerge after a study has gained influence? People often want to be associated with initiatives that are already successful and influential. Would the same individuals have expressed interest in collaborating with the RCMED at the outset of the EGRS I, before the impact of this study (and subsequent studies) was evident?

As the EGRS studies have gained recognition and influenced conversations on effective interventions, early learning, and reading instruction, demand for collaboration has likely increased. While collaboration is undoubtedly valuable, there are also pitfalls. Excessive collaboration can significantly slow decision-making, leaving projects stuck in the design phase. Further, no research initiative can satisfy all stakeholders in the sector. It is impossible to make everyone happy. Moving forward, it will likely be critical for the RCMED to balance their independence and collaboration with others.

Related to the discussion of collaboration is the discussion of independence. Some argue that the government should not be evaluating its own policies, out of concern that failures and criticism may not be freely expressed or published. According to this view, partial independence is preferable if the government commissions and funds the research, but the researchers execute the task free of prejudice. As one respondent expressed:

It should also be partially independent. Let's say we've got the institute, the university institute. We should be able… it should be run by people that are independent, but we then pay them. It must be run like a task, so that it should influence, but it should also take the needs of the government [into account] and influence policy development. It's very, very important.

Others argue that being part of the government brings a deeper understanding of the systemic challenges facing the DBE. It also fosters a sense of loyalty, whereby researchers communicate policy failures internally with the aim of driving improvement. One respondent expressed that it was uncommon for governments to allow negative results to be published, and credited the integrity of the RCMED researchers and DBE leadership for enabling this practice:

So, whatever incentives are in place so that, for example, the RCME unit does not have to, you know, suppress those results, for example, that's a key part of this, right? It's not just the existence of this thing. It's the fact that they're allowed to publish things that don't look great because a lot of government agencies would have real trouble doing that.

As the RCMED continues to navigate independence versus collaboration, an important question should guide thinking: How can it preserve the credibility of the evidence it produces while staying meaningfully connected to the policy-making processes it seeks to help inform?

Chapter 5: Discussion

This section examines and analyses the findings reported in Chapter 4 using the frameworks discussed in Chapter 2 (EBP, constructivist, and the WWH conceptual framework of policy influence) The goal here is to understand how the various findings from the present study influence policy making (or not). These findings are examined with the goal of understanding the factors that ultimately contribute to learning at scale and whether these factors are linked to the research being embedded in the government.

5.1 Elements of a successful government-led research hub

Government support for evidence-based policies

There was general agreement among respondents that policy decisions should be rooted in evidence, but disagreement about whether that evidence should be produced externally or internally to the DBE. The support for evidence-based policies is somewhat hollow in cases where policymakers did not demonstrate a deep understanding of how credible evidence is produced. There was strong agreement that the primary responsibility of all branches of the national DBE is to develop policies, as opposed to provincial departments, which are primarily responsible for implementation. While some respondents acknowledged the potential role of provincial research hubs in producing evidence and recommendations for policy development, it emerged that these provincial hubs are mostly unable to do that effectively because they are under-resourced. EBP theory recognises that a lack of research skills among policy makers may hinder the uptake of evidence in policy, which may be applicable to the superficial understanding of evidence among some officials and the lack of research capacity in some of the provinces, despite vocal support for EBP.

Internal agreement on the mandate of the research unit

Clarifying the mandate of a government-embedded research hub is essential, particularly because such units are not solely responsible for conducting original research, but also serve internal departmental functions. These functions include responding to both the research and monitoring and evaluation needs of other branches, who effectively serve as internal clients. When the mandate of the RCMED unit is unclear or consistently misunderstood, it can negatively impact how research outputs (evidence) are received and used. If research is not perceived as relevant or needed, the clients (other departments) may become frustrated by what they view as the misallocation of resources towards experimental or academic research rather than programmatic support. The relevance and timing of research as it relates to the policy-making process is another potential barrier to EBP identified in the theory, which emphasises the importance of agreement on the mandate and priorities of the research unit.

Findings from this study suggest that the RCMED's mandate is not universally understood across the DBE or among provincial officials. This misalignment supports a constructivist understanding of policy development, where institutional roles are not defined only by legal or policy frameworks, but are actively interpreted and shaped by stakeholders (this is in contrast to a strict EBP paradigm). Many respondents, who work outside of

the RCMED, were unfamiliar with the official policy and legal basis for the unit's work, and thus, constructed their own stories around its origin and purpose. These differing stories and interpretations suggest that the perceived relevance of the unit is shaped largely by local narratives and personal interactions rather than formal documentation.

Relatedly, there seems to be limited understanding of the full scope of the RCMED's responsibilities across the DBE. Some respondents believed the unit operates autonomously, prioritising tasks completely independently, with no regard for the needs of other branches. While some DBE officials expressed appreciation for the support they received from the RCMED, others described feeling frustrated that their department's needs received limited attention, illustrating that experiences with the RCMED vary widely.

Notably, there were differing views on whether the RCMED, as a government-embedded EdLab, should be conducting original or experimental research. Many participants felt that this kind of research distracted from what should be the unit's core functions: internal support, monitoring and evaluation coordination, and synthesising learning across branches. For many officials, what is most valued is not innovative research, but dependable support in fulfilling their own monitoring and evaluation responsibilities. These findings highlight an institutional demand for practical, applied research that aligns with practical programmatic needs. A constructivist perspective further illuminates how the personal values of policymakers may influence how they receive evidence from the internal unit.

It has been important to include a review of provincial research units in the study because South Africa has a decentralised education ministry. The structure and function of the RCMED is quite different from the three provincial research hubs evaluated in this study. Compared to the five key responsibility areas of the RCMED, provincial units typically have narrower mandates that are focused primarily on monitoring and evaluation aligned to annual performance plans. These provincial units are typically not in a position to conduct original research or provide internal branch support, due, in part, to limited resources and capacity. In practice, these units often default to a coordination role, supporting DBE-led research projects in their provinces and providing ethical clearances for other studies. Given current constraints, expectations that these provincial units might evolve into independent research hubs seem unrealistic without significant investment. Nevertheless, they fulfil an important function in supporting the work of the RCMED at a local level and they remain a key client of research findings aimed at policy reform.

Overall, the findings suggest that the RCMED's mandate is not well understood across the DBE. This leads to frequent misperceptions about the unit's roles and responsibilities. While those within the RCMED may believe they are well-aligned with the rest of the department, this belief is not always shared by others. While those within the RCMED may believe their work is well- integrated and widely supported, others see overlap with the work of other units and unmet needs.

In particular, concerns about duplicated research and the under-prioritisation of monitoring and evaluation support point to the need for clearer communication of the unit's mandate.

These findings highlight the importance of ensuring not only that government-embedded research units have clearly defined mandates, but also that those mandates are consistently understood and reinforced through communication and stakeholder engagement. Otherwise, the credibility and usefulness of research outputs may be diminished, regardless of their relevance or quality.

Collaboration between the research unit and other sections of the Education Ministry

The findings show that internal relationships and ongoing consultations are critical for enabling research to influence policy. Even preliminary processes, such as collaboratively setting the research agenda, may significantly shape how research is perceived and valued by internal stakeholders.

Actors within the RCMED largely believe that they are responsive to the needs of the branches and that, in some instances, they even exceed expectations. However, they also acknowledge the difficulty of building the kinds of relationships necessary to facilitate effective collaboration. This is evident in the unit's expectation that other branches should initiate requests for support. A few respondents expressed frustration at having to make special requests for their topics of interest to receive attention. Even when support is provided, there may be a mismatch between expectations for simple and affirmative evaluations of programmes, and the rigorous methods generally employed by the unit. This tension can create a push-and-pull dynamic over roles and responsibilities, with the RCMED feeling the need to assert boundaries – especially when it comes to monitoring requests. The burden of communicating the unit's mandate seems to fall on the RCMED.

It seems that some branches have developed stronger working relationships with the RCMED than others. For example, the curriculum branch was able to cite multiple collaborative projects with the RCMED. This may be due, in part, to the EGRS series' focus on improving curriculum delivery. Many by-products of the EGRS series – such as the reading benchmarks – have been particularly relevant to the curriculum branch. Therefore, it is unsurprising that this branch expressed strong support for the RCMED, even if their understanding of the unit's role tended to conflate monitoring, evaluation and research. For them, the RCMED's value was seen in terms of its ability to "[find] out if programmes are effective", reinforcing the ongoing ambiguity surrounding the unit's mandate.

The relationship between the national research hub and the provincial units is also important in facilitating policy influence. However, this relationship is often experienced as hierarchical rather than collaborative. Provincial officials do not feel that they are research partners, but rather facilitators of the DBE's work, and this was partly blamed on insufficient resources in the provinces. Provinces also notice when evidence-based policy directives come from the RCMED, rather than through the Branches for Curriculum or Teacher Development, as expected. When this happens, provincial officials, who are responsible for programme development and implementation, can become confused about the source and the legitimacy of the directive, thereby weakening the directive's influence.

In summary, when individuals do not perceive experimental research as aligned to their needs or priorities, they may become resentful, disengaged, or even resentful to its findings. In some cases, this can lead to the active discrediting of research results. The constructivist theory of policy- development provides a helpful lens for understanding these kinds of reactions, which are rooted in identities, power dynamics, and relationships, rather than purely rational readings of evidence.

Measures of success

Respondents identified a wide range of indicators for success of a government-embedded research hub, from bureaucratic compliance to system-wide educational improvement. For some, success would be defined by the delivery of outputs, like the annual evaluation and performance plans. Others emphasised the importance of internal collaboration, as well as delivering fresh, relevant and practical recommendations. Some had a more ambitious view of success, such as ending ineffective programmes, and improving educational outcomes at scale. Two international researchers commended the RCMED for becoming a recognised authority

on key education issues, precisely because their work is based on large datasets, and exemplifies what is possible for a government-embedded EdLab to achieve.

Conditions for success and replication

The findings suggest that the positioning of the research unit within the Education Ministry can significantly impact its success. Senior-level managers must protect and promote the research function of the hub and ensure that evidence is effectively communicated to the branches and provinces. Ironically, this means that bureaucratic backing is needed to protect the unit from bureaucratic demands – showcasing one of the known barriers to evidence-based policy- development.

Strong partnerships with universities and external researchers are also essential because the RCMED cannot house all the necessary expertise internally. Further, collaboration with external researchers can strategically enrich research outputs by bringing different perspectives and credibilities that can enhance the impact of the findings. The research unit should engage a wide variety of academic partners. Respondents highlighted a risk of not doing this: working too much with one university may lead to accusations of favouritism or bias and cause resistance to research findings from some officials. This seems like an easily achievable and mutually beneficial condition for success.

A research hub must employ highly skilled professionals, not only to meet the demands of the work, but also to bolster the unit's stature and attract other talent. Respondents identified a broad range of essential skills and knowledge, including expertise in research, monitoring and evaluation skills, economics of education, and public finance. Broad sector knowledge was considered more important than deep content expertise, which can be brought in as needed. In addition to technical knowledge and skills, respondents emphasised the need for project management, communication and soft skills – particularly for promoting uptake of findings into programmes and policies.

Resource constraints were highlighted as a major limitation to the success of a research hub. The allocation of resources depends both on political priorities and on the degree to which a unit can prove its usefulness to its internal clients. Most research projects require fundraising from external donors, although this is not articulated as a key responsibility of the researchers employed in the units. The national research unit is far more successful in fundraising than the provincial units.

Ultimately, the strength and motivation of the research team emerged as a key factor in the RCMED's success – a potential barrier for replicability. It is not enough to have technical expertise; researchers must also be driven by a mission to improve the education system through the strategic use of evidence. This mission must be stronger than professional incentives, such as, research freedom, publications or promotions, which may make it difficult to recruit and retain talented individuals.

5.2 Lessons from the EGRS series

An Evidence-Based Policy lens on translating research into policy for systemic change

A critical lens for interpreting the RCMED's work is Evidence-Based Policy (EBP) theory, which assumes that rigorous, systematic research can shape policy and programmatic decisions. From this perspective, the RCMED's commissioning of the EGRS series represents a deliberate effort to generate credible, causal evidence on effective literacy interventions to inform national policy.

The EGRS series demonstrated the strong impact of structured pedagogy interventions on early literacy outcomes, particularly the combination of lesson plans, learning materials, and in-person coaching. In producing this evidence, the RCMED positioned itself as a trusted technical actor within the DBE, aligned with the principles of EBP. However, while EBP theory assumes that evidence will inform policy in a rational, linear way, the RCMED's experience reveals a more complex reality. Findings from this study show that, even when robust evidence demonstrated the effectiveness of in-person coaching, the scale-up was constrained by financial, logistical, and political realities. Structured lesson plans, which aligned more easily with existing curriculum frameworks, were taken up through national programmes like the PSRIP, but the coaching component, despite its proven impact, was largely adapted or dropped due to resource limitations.

The RCMED's efforts to find scalable alternatives, such as school-based department head coaching in EGRP or virtual coaching models in EGRS II, highlighted further tensions between evidence strength and practical feasibility. While more affordable, these adaptations often led to diminished learning gains, reinforcing the insight that cost-saving modifications need careful design and testing before being scaled.

This RCMED's experience with the EGRS series thus affirms a central limitation of the EBP model: while high-quality evidence can strengthen technical arguments for reform, its translation into policy and system-wide practice depends on alignment with political, financial, and operational realities. Evidence is necessary but not sufficient. This sets the stage for other perspectives, such as constructivist theory, that help explain how influence unfolds beyond the generation of credible research alone.

Evidence alone does not guarantee uptake. Policy influence often requires negotiation, strategic timing, and alignment with existing system structures. The RCMED's work through the EGRS series reflects this tension. While credible evidence was successfully generated, ensuring that evidence translated into sustained, system-wide action required navigating a far more complex and dynamic policy environment.

A constructivist view on learning through experience and adaptation

A second important lens for interpreting the RCMED's experience is constructivist theory, which focuses on how individuals and organisations interpret, adapt, and apply new information within their specific contexts. While EBP helps explain the generation of credible research, constructivist theory highlights the social and relational processes that shape how evidence is actually used or not used in real world practice.

Findings from this study show that the uptake of the EGRS research findings was not automatic, even when strong evidence was available. District officials, subject advisors, and teachers engaged with the structured pedagogy interventions differently, depending on their local realities, professional experiences, and resource constraints. The same research evidence produced varying reactions and adaptations across different provinces and districts. For example, while structured lesson plans were intended as standardised tools, their successful adoption often depended on the quality of coaching relationships and the ability of local actors to adapt materials meaningfully. Where teachers and district officials felt ownership of the changes, supportive coaching and collaboration resulted in more substantial uptake. In contrast, resistance or superficial compliance was more common when interventions were perceived as externally imposed or disconnected from daily realities.

These patterns illustrate key insights from constructivist theory: that evidence is not simply 'implemented' but actively interpreted and reshaped through human interaction. The RCMED's strategy of supporting iterative learning through coaching, pilot adaptations, and reflective feedback loops reflects a recognition—whether explicit or implicit—of the importance of these relational processes in evidence uptake. In short, constructivist

theory helps explain why even strong evidence from the EGRS series produced uneven system-level change. Uptake depended not just on the strength of the intervention design, but on the processes of meaning-making, negotiation, and adaptation within the education system.

5.3 Thinking about influence: EBP, constructivist theory and beyond

The influence of the EGRS series is not easily defined; influence is complex, amorphous, and elusive, extending beyond the boundaries of formal policy. An analysis of the themes emerging from respondents' reflections on the EGRS series over the past ten years reveals that, even though there has not been a straightforward pathway from evidence to policy, these studies have still shaped the educational landscape in both direct and indirect ways.

Unsurprisingly, an effort to track the influence of the EGRS reveals that the EBP perspective, which assumes a rational, linear progression from research findings to policy action, is insufficient, aside from highlighting the barriers to policy influence in this case. Instead, the influence of the EGRS series has manifested in less tangible ways, such as shaping the discourse around structured pedagogy, influencing research questions, and contributing to the growing body of knowledge on early-grade reading interventions. Influence is also shaped by influence: previous studies and their findings inform future work; the more influential the study, the more likely it is to inform future studies. This works to create an evolving network of interconnected evidence.

Factors shaping perceptions and influence

Perceptions people hold around the evidence generated through the EGRS series is shaped by individuals' positionality within the sector. Stakeholders who hold decision-making power within government, research institutions, or donor agencies may perceive these studies differently from those who are less embedded in formal policy processes. Stakeholders' assessments of these studies may be influenced by how the EGRS series—and the RCMED more broadly—affects their own power, authority and strategic priorities. Influence does not exist independently; rather, it is a dynamic process that depends on people. It is shaped by how individuals interpret, internalise, and act upon research findings. The following are explanations of how one's positionality in the broader system may shape perceptions:

- **The impact of methodology on influence**: How people perceive the influence of the EGRS series is also shaped by their views on the methodologies used in these studies. Some stakeholders value RCTs as rigorous and credible evidence of causal relationships, aligning with the principles of EBP. Others may be more sceptical of RCTs, particularly if they prioritise qualitative insights that capture contextual nuances. The extent to which individuals view the EGRS findings as part of a bigger body of evidence—rather than as isolated results—also affects their interpretation of the studies' influence. Those who recognise the alignment between the EGRS results and similar structured pedagogy research from other contexts may be more likely to view these findings as robust and generalisable.
- **Local versus international influence**: The perception of influence also seems to differ between local and international stakeholders. The criticism of the EGRS from within the DBE is based on views of the mandate of the unit, the way the study was conducted and from people who feel that they have been excluded from it. It does not reflect on the findings of the EGRS in the same way that researchers do. South African researchers and policymakers are more likely to critically engage with the findings, assessing their direct relevance and impact on the South African education system. This engagement may stem from the direct implications of the research on their own work and the potential impact on their professional standing. By contrast, international actors may be less concerned with the specificities of the South African context and more interested in whether the findings align with broader trends in structured pedagogical interventions across the Global South. For these stakeholders, the key question is whether

the EGRS results reinforce or challenge existing knowledge on early- grade reading interventions rather than their localised policy implications.

- **Internal versus external perspectives**: The perspectives of actors within the formal South African education system may also differ from those who are external to it. Internal stakeholders, such as policymakers and education officials, may view the EGRS findings through the lens of national priorities, curriculum alignment, and political considerations. Their concerns may focus on feasibility, scalability, and how the findings intersect with broader government strategies. External researchers, donors, and international organisations, on the other hand, may focus more on methodological rigour and the extent to which the EGRS findings align to global evidence on effective literacy interventions.

  Additionally, influence is often invisible; much of the influence of the EGRS series is invisible. Research findings do not only inform explicit policy decisions; they also shape how people think. For example, the EGRS may have shaped how people who have encountered the studies think about literacy interventions, structured pedagogy, and randomized control trials (RCTs). This subtle form of influence is difficult to quantify but plays a critical role in shifting perspectives and decision-making processes over time. Some forms of influence may also be negative; such as studies demonstrating that an intervention was ineffective, which may lead to a decision not to pursue similar approaches in the future. This type of influence is less visible than direct policy- adoption but is equally significant in shaping education policy and practice.

Coaching: Effective but challenging

One key area where the tension between evidence and policy becomes evident is in the case of instructional coaching. The EGRS series has demonstrated that coaching is a critical component for improving learning outcomes in the South African context. However, despite the strong evidence base in favour of coaching, it has struggled to gain traction within the system due to political feasibility, resource constraints, and competing priorities.

Coaching, thus, represents a clear example of how even compelling research findings do not automatically translate into large-scale policy adoption. From an EBP perspective, the demonstrated effectiveness of coaching might suggest it should be integrated into formal teacher- support structures. Yet, constructivist policy perspectives help explain why this has been difficult in practice: coaching does not fit neatly within existing institutional structures. For example, unlike SAs and DHs, coaches are not part of the post-provisioning norms (PPN), making their systemic inclusion challenging. Additionally, political will to create a new category of personnel within the system is weak given budgetary restraints and competing agendas, reinforcing the constructivist argument that policy decisions are shaped by existing institutional norms and the appetite for reform.

Given systemic and financial restraints, it is rational for policymakers to be cautious about attempting to scale an intervention that includes coaching, despite the strong evidence for its effectiveness. This tension points to a need to explore alternative models that integrate the core benefits of coaching while addressing feasibility concerns. The EGRS II and EGRP studies have trialled potential adaptations by testing scaled-down versions of coaching: virtual coaching and training DHs as coaches. While these adaptations did not yield the same impact as one-on-one coaching, they represent efforts to align EBP findings with systemic realities.

Organisations, such as Funda Wande, have also experimented with alternative teacher-support models, using teaching assistants to provide structured support to teachers. This approach may offer a politically and financially viable alternative to full-scale coaching—particularly because of high unemployment rates in South Africa. A key challenge is to balance fidelity to the original intervention with the need for scalability, ensuring

that any adapted model retains the essential elements that drive impact.

The case of coaching underscores the broader challenge of EBP implementation in complex education systems. Even when evidence is strong, practical and institutional barriers often limit full implementation of trialled interventions. While EBP provides a strong rationale for scaling SPPs that include one-on-one coaching, constructivist theories help explain why it has not been widely adopted in the system. Decision-making requires evidence to be considered alongside context, capacity and feasibility.

To collaborate or not?

From an EBP perspective, research should directly inform policy and practice by generating credible, rigorous, and actionable findings. However, the constructivist theory emphasises the role of relationships, interactions, and shared meaning-making in shaping the impact of research. From this perspective, the debate between collaboration and independence is not about choosing one over the other, but about understanding how power dynamics, relationships, and institutional cultures shape the perceived credibility and usefulness of research.

Collaboration—both with other government units and with external stakeholders—has the potential to enhance the robustness, credibility, and relevance of RCMED research by incorporating diverse perspectives and ensuring findings address practical and significant challenges. This, in turn, increases the likelihood of policy uptake. However, maintaining independence allows for greater objectivity and rigour, shielding research from political pressures. Some respondents expressed concerns about the government suppressing unfavourable results, highlighting the ethical imperative of autonomy in maintaining credibility.

From a constructivist perspective, influence is not just a function of producing good evidence, but also of how research findings are communicated, negotiated, and received by key stakeholders. Respondents' emphasis on personal integrity, credibility and work ethic suggests that trust plays a central role in determining the impact of government-led research.

Ultimately, neither full independence nor complete collaboration guarantees research influence. From an EBP perspective, maintaining rigorous methodologies and ensuring sustainability through institutional mechanisms is key. Through a constructivist lens, building relationships, fostering trust, and navigating bureaucratic dynamics are just as important for maximising research impact. A balanced approach—prioritising both methodological rigour and strong stakeholder engagement—is likely to be key to ensuring impact and influence.

Further research

While the EGRS series has made a significant contribution to educational research and policy, many respondents emphasised the need for continued studies to address outstanding questions. Influence is an ongoing process, and further research is needed to deepen our understanding of effective interventions and their applicability across different contexts. The RCMED's ability to identify and pursue key research questions has been valuable, but there is still work to be done in expanding and refining the evidence base.

5.4 A view of EGRS policy influences through the What Works Hub conceptual framework

The WWH conceptual framework provides a system-level view of how research evidence moves, or fails to move, through different stages of policy and practice. Rather than expecting a simple, linear pathway from research to action, the WWH framework recognises that influence is rarely linear. It highlights four interconnected phases through which influence may flow: Efficacy, Efficacy+, Policy Plans, and Practice at Scale. Applying this framework to the RCMED's experience with the EGRS series offers important insights. For example, through the EGRS series, the RCMED successfully produced strong evidence on effective early-grade reading interventions, aligned with the framework's "Efficacy" and "Efficacy+" phases, but from there it did not follow a neat path to policy influence.

Efficacy (interventions and approaches that have been proven to have a positive impact through an RCT)

As multi-component, structured pedagogical programmes, the EGRS interventions, provide compelling evidence of efficacy in improving foundational literacy outcomes in Quintile 1-3 schools in South Africa. RCTs, employed as the "gold standard" of research, demonstrated the causal relationships between the implementation of EGRS interventions and improved reading outcomes. For example, face-to-face coaching stood out as a necessary component for improving learning outcomes in both the EGRS I and II interventions. The results from these studies showed that face-to-face coaching helped build trust and accountability in a way that neither training alone nor virtual coaching could replicate. This component of the intervention, along with training and structured learning materials, enabled teachers to translate new teaching methodologies into classroom practices, as coaches assisted in helping teachers overcome the challenges of learning and implementing something new in their own classrooms.

Efficacy Plus (efficacy, but evidence that includes different contexts, implementation through government and at scale)

The first iteration of the EGRS series, the EGRS I, was implemented in Home Language (Setswana) in the North West Province. The results for EGRS I demonstrated the need for one- on-one instructional coaching to significantly shift learning outcomes; termly training and structured lesson plans did not on their own have a significant impact on learning. With this knowledge, the EGRS II was designed as an EFAL intervention testing different iterations of coaching: the traditional, classroom-based coaching as was conducted in the EGRS I versus virtual (WhatsApp) coaching – both in addition to termly training and structured learning materials. The EGRS II results demonstrated that the initial positive impacts of the virtual coaching could not be sustained. By the conclusion of the project, the results clearly demonstrated (again) the efficacy of one-on-one, classroom-based coaching in shifting learning outcomes. However, while coaching as one component of a multi-component intervention has shown to shift outcomes significantly, it has not necessarily led to policy plans or practice at scale.

Because there does not seem to be a political appetite for external coaches to take on instructional coaching at scale, there has been some effort to explore alternative models for teacher-support. For example, Funda Wande has tested the use of teaching assistants rather than traditional coaches in Limpopo, finding some success. The EGRP, conducted in the North West province, compared external coaching models with internal coaching by departmental heads, and the internal model was not found to be a successful alternative to external coaching due to a variety of barriers. The EGRP II is currently being implemented in the Northern Cape. This intervention aims to test the use of a multi-component intervention (coaching, training, and structured learning materials) in multi-grade classrooms and to trial the coaching by departmental heads again before giving up on this model.

The Primary School Reading Improvement Programme (PSRIP), an EFAL structured learning programme that has included structured lesson plans based on the EGRS II materials (but with improvements based on lessons learnt), termly training, and the ongoing training of subject advisors to serve as the support (coaching) component, has been implemented in schools across all of South Africa's nine provinces. Though anecdotally, many subject advisors and teachers feel this programme has helped to improve teaching practices, no rigorous research has been conducted to demonstrate efficacy.

In addition to the RCTs which have been critical to demonstrating empirical improvements in learning outcomes of certain treatments, qualitative studies have also been conducted as part of each of the various EGRS programmes. Observational and interview case studies have uncovered not only that these interventions can work, but elements of what is actually happening within classrooms where these projects have been implemented. Finally, a qualitative study was conducted by the DBE, in partnership with RTI international, to explore the possibilities and barriers of using actors internal to the system to carry out a coaching function. The study examined whether subject advisors or DHs may be able to take on coaching. The study showed, however, that there would need to be significant shifts to build system-capacity for formal coaching to occur.

Policy Plans (government policy ideas, plans, frameworks etc., even laws, but not yet implemented at scale)

The robust evidence generated in the EGRS series has influenced policy plans by embedding the need for evidence-based practices into high-level discussions and often, into systemic frameworks. Because evidence from the EGRS series is widely known and highly respected by many in the South African sector, it is always part of the conversation. However, at this point, the evidence generated is also contested and thus, ignored by others in the sector.

It seems that lessons learnt from the EGRS series may have helped to ensure that there are robust conversations occurring within the DBE and beyond around the provision of structured learning materials and aligned resources, targeted teacher support, the importance of early-grade (FP) learning, the importance of home language instruction, and best practices for the teaching of reading and teaching language. In certain instances, policy plans around these lessons may be quite far along. For example, the implementation of the EGRS series revealed the need for unique reading benchmarks in the African home languages. Researchers in the RCMED then worked to develop these benchmarks for national use. While these benchmarks have been established, they largely remain as 'policy plans' currently, as they have yet to be rolled out on a large scale.

It is perhaps important to note here that there has not been a large-scale change in curriculum policy since the introduction of the CAPS in 2012. However, there have been a variety of circulars and workarounds that have been issued. Due to the haphazard nature of changes issues, it is difficult to keep track of what exactly these are and how the EGRS findings may have had impact. However, it is clear that there is a resistance to make large-scale, sweeping policy statements – a fact that is important to consider when thinking about the EGRS series' impact on policy.

Practice at scale (what is actually happening in classrooms at scale, whether based on best practice evidence, whether based on government policies and laws)

While the findings from the EGRS series have not been formally implemented at scale in a South African context, this does not mean they have had no impact at scale. The learnings from the EGRS series have likely had some significant impact – especially indirect impact – on early-grade reading.

Firstly, as discussed above, the EGRS has brought needed attention to the importance of literacy instruction in the early grades. While foundation phase has historically been undervalued and, as a result, under-resourced, the studies have demonstrated the need for the system to shift some focus from Matric to student's early learning foundations. Additionally, the EGRS findings have highlighted the need to focus on home language instruction first—and demonstrated the potentially negative spillover effects of focusing disproportionately on English early on. These understandings seem to have gained wide traction in the system—even if their impact on practice at scale is widely varied, and on policy at scale has yet to formally change.

The EGRS series has demonstrated teachers' appetite for structured learning materials and structured learning programmes—even if unions may criticise these materials, and even if without a formal coaching element they are not always implemented correctly. In qualitative reporting from the EGRS, teachers were generally positive about the help they received from the materials and training. This was demonstrated in a recent qualitative study conducted by the NECT of classrooms in PSRIP districts in four different provinces, where nearly all of the teachers were observed using PSRIP methodologies and materials—even those teachers in schools that had not received the printed materials or training to do so.

There is also some qualitative evidence, for example from the SoT Subject Advisor study that the importance of coaching has been recognised and acknowledged by many subject advisors in the

system. While they might not have the time and capacity to conduct formal coaching in the schools they support, the understanding that teachers need help and support to shift their teaching practices may have some impact on the interactions between teachers and these district officials.

Using the WWH framework, we can see how the RCMED's influence played out across different levels, sometimes simultaneously. It also reveals how different actors: researchers, policymakers and implementers interacted with the evidence in different ways. Rather than expecting a single pathway from research to reform, this framework helps explain the multiple, dynamic routes that influence can take.

Chapter 6: Conclusion and Recommendations

6.1 Conclusion

This study explores the role and effectiveness of a government-embedded EdLab, examining the RCMED and its coordination of the Early Grade Reading Studies (EGRS) series. Drawing on key stakeholder interviews and document analysis, the study seeks to understand what makes a successful government-led research unit, the lessons from a decade of early-grade reading research, and how such research influences —or fails to influence—policy and practice.

The literature review discusses the importance of evidence-based policymaking (EBP) in education. It stresses that research hubs are important in ensuring that educational policies and programmes are based on empirical evidence rather than simply on the preferences of politicians and administrators. Effective research hubs have strong governmental partnerships, consistent funding, and research agendas that are aligned with national education priorities. The literature review also situates the EGRS series within the growing body of evidence around structured pedagogy and highlights the need for further research into the pathways between evidence generation and policy uptake—and how EdLabs (especially government-embedded ones) may help open these pathways

The findings of this study largely reflected these themes, but also served to reveal some of the complexities underlying them. For a government-embedded EdLab to be fully effective, there is a need for a clear and widely understood mandate, political support, effective partnerships, dedicated funding, and precise mechanisms for incorporating research into policy. The RCMED has played an important role in generating rigorous education research. However, its impact has been hampered by politics, perceptions of limited internal collaboration and the absence of formal structures to translate research findings into actionable policies. The frequent repetition of research initiatives across DBE branches without coordination further undermined efficiency.

The EGRS series provided a strong empirical case to explore these dynamics in practice. Across three major studies (the EGRS I, EGRS II, and the EGRP), the RCMED Directorate tested and demonstrated the effectiveness of structured pedagogical interventions in South African contexts, especially those involving in-person coaching. However, concerns about cost and scalability have raised important questions about system-wide application. Despite the strength of the EGRS evidence, uptake into national policy and practice has been uneven. Scripted lesson plans and some coaching models have been incorporated into initiatives like the Primary School Reading Improvement Programme (PSRIP), but broader systemic reforms have been slow—constrained by political, financial, and institutional factors.

This reinforces one of the key findings of this study: that evidence alone does not shape policy. Political priorities, budgetary constraints, and competing agendas significantly shape whether, and how, research findings are adopted. Even when the conditions for evidence-based policymaking seemed to be favourable—strong researcher-policymaker relationships, clear communication of findings, and contextual relevance—the influence of the evidence produced by the RCMED was partial and even contested.

Ultimately, the influence of the EGRS series cannot be neatly categorised within a single theoretical framework. While EBP provides a useful starting point, the findings show that influence is rarely straightforward or linear. Instead, influence is a dynamic process—it is shaped by visible and invisible forces and the actions of individuals within the RCMED, DBE, and beyond. Stakeholder positionality also impacts how influence is perceived and enacted. Leadership, political alignment, and strategic advocacy were critical in shaping the ways in which the RCMED's ability to push evidence into policy spaces. Where these capacities were strong, evidence had a greater reach; where they were weak, even the most rigorous evidence struggled to move beyond academic spaces.

The experience of the EGRS series highlights the limitations of a strict EBP perspective, which assumes a purely rational progression from research findings to policy action. While this might be ideal, it is simply unreflective of reality. A more constructivist understanding, emphasising relationships, power dynamics, and institutional norms, better captures the realities of how influence operates in practice. The case of instructional coaching, discussed extensively throughout this study, for example, showcases how even robust evidence can be insufficient for large-scale policy adoption due to political, financial and institutional barriers.

While the direct influence of the EGRS series from evidence to practice at scale has been limited, the EGRS has exerted significant indirect influence: shifting funders' priorities, raising awareness on the importance of foundational literacy, and reshaping conversations around structured pedagogy and effective literacy interventions more broadly. Even if national policy change and formal practice at scale has been slower than hoped, the EGRS series has undeniably contributed to a deeper understanding and reframing of the literacy challenge in South Africa.

In general, the present study opens up important questions for government-embedded EdLabs in education. How can internal structures be strengthened so that research systematically informs policy and practice, rather than remaining a 'good story' in reports and libraries? How can strategic leadership, political buy-in and institutional mechanisms be more effectively cultivated to move evidence into action? How can independence and collaboration be balanced to maximise trust in research outcomes and minimise resentment or backlash?

Understanding the complexity of research influence – and resisting the temptation to expect a neat, linear pathway – is crucial. The story of the RCMED and the EGRS series reminds us that education change, even when grounded in robust evidence, requires not only rigorous studies but also the ability to strategically navigate the messy, ever-changing realities of policy-making. Influence is not a moment; it is an ongoing, negotiated process—and sustaining it will require continued research, adaptability and engaged leadership.

6.2 Recommendations and the way forward

Based on this study, the following key recommendations are made to enhance the effectiveness of government-embedded EdLabs and to strengthen the influence of research on education policy and practice:

First, research must be intentionally integrated into government decision-making processes. The RCMED's research agenda should be formally integrated into the DBE's planning and budgeting cycles, to better ensure that research findings systematically inform policy-formulation and programme-implementation. Institutionalising research-policy dialogues—rather than relying on ad hoc discussions—may help shift the RCMED's influence from episodic to sustained. Without formal mechanisms in place, even high-quality research risks being ignored, underutilised or inconsistently applied.

Importantly, strengthening the influence requires moving beyond an EBP expectation of a linear progression from research to policy. A more constructivist perspective – which is relational, political and iterative – must be kept in mind in efforts to embed research into government decision-making processes.

Second, government-embedded research hubs, like the RCMED, must proactively design and test cost-effective models for scaling interventions. The EGRS series provides a strong foundation, but future research could more explicitly focus on pragmatic applications to assess feasibility at scale. Strategic research on scalable models may help strengthen influence by demonstrating practical pathways for system-wide or national uptake. Likewise, integrating structured pedagogy approaches into pre-service teacher training programmes could help institutionalise practical, evidence-based literacy instruction over the longer term, embedding research findings more deeply within the system (rather than just as isolated pilot projects). Ultimately, to

maximise impact, efforts towards scaling must balance fidelity to effective (best) practices with adaptations that fit systemic realities.

Third, sustainable resource mobilisation is essential for translating research into meaningful change. Government funding for foundational literacy must be incorporated into national and provincial budgets, moving beyond reliance on short-term, donor-funded projects. Strengthening financial commitment may serve to signal political will and build a foundation for evidence-based programmes to influence system-wide priorities over time.

Fourth, the RCMED's research scope should be broadened beyond early-grade reading to include other important education issues, such as mathematics education, language of instruction, and leadership development for principals. Although early literacy is a critically important focus, expanding the research scope could increase both the RCMED's relevance and impact. Collaborating more purposefully with provincial research units could help to enhance contextual relevance and bolster the credibility, implementation and local influence of findings.

Fifth, a balance between independence and collaboration must be carefully and consciously maintained. For a government-embedded EdLab, influence is not only about producing credible evidence; it also relies on building relationships and credibility among political decision-makers. Collaborating with a variety of stakeholders (especially internal stakeholders) is necessary for ensuring that research is relevant and aligned with system priorities—and that there is interest in, and uptake of, the research findings. However, collaboration must also be purposeful and selective, as there is the risk of becoming overstretched and ineffective.

While collaboration has value, maintaining a degree of independence is also critical to safeguarding the credibility of research, particularly when findings may be politically sensitive. Navigating the tension between independence and collaboration thoughtfully—through transparent communication and strategic stakeholder engagement—can bolster both the impact and sustainability of the RCMED's influence over time.

Finally, influence must be understood as an ongoing, dynamic process—not a singular event. Much of the EGRS series' influence has been indirect and subtle, but this does not make it insignificant. The EGRS series has contributed to, and helped shape, both local and international conversations on how structured pedagogy, literacy challenges, and education change are conceptualised and understood. Government-embedded EdLabs must invest in long-term strategies for influence: fostering sectoral dialogue, contributing to public discourse, and strategically communicating research findings in a variety of ways that resonate with diverse stakeholders. Ultimately, agility and sustained engagement are critical to ensuring that evidence is not forgotten or ignored, but continuously informs decision-making.

In conclusion, this study highlights some of the possibilities and limitations of government- embedded research hubs in education. While the RCMED, through the EGRS series, has generated knowledge valuable to the sector, challenges remain in how to sustain and amplify its influence on large-scale system change. Moving forward, there is a need for deeper commitment to institutionalising research within formal decision-making processes, securing long-term funding, balancing independence with strategic engagement, and embracing a broader, more relational understanding of influence.

Ultimately, structured literacy reforms, grounded in rigorous and robust research and strengthened through intentional, sustained and strategic engagement, can help address the literacy crisis and ensure more effective education for all learners in South Africa.

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8. Appendices

Appendix 1: A list of EGRS reviewed documents

2019 Virtual Coaching Model Summary (Revised)
2023-24 Annual Operation Plan (DBE)
Action Plan to 2024 (Full)
Background EGR in Education Research – Practice Presentation (Prof Fleisch)
BuaLit Letter to uMongameli (9 July 2019)
Bua-lit Response – Reading in African Languages (7 Aug 2019)
Classroom Observation Report (Final)
Coaching Course SMM Annotation (2019)
Costing and Scaling a Reading Programme – Policy Brief
DBE Research agenda
DBE-DPME Progress Report (April 2020)
Design Evaluation Report
DG Submission to DPME
Draft Report – RSP Formative Evaluation (Nov 2019)
Early Grade Interventions – Oxford Book
Early Grade Reading. In South Africa Reading, Spaull and Pretorius, Oxford 2022
Early Grade Reading and Mathematics Interventions. In South Africa Interventions, Spaull and Taylor, Oxford, 2022
EGRP Midline Report
EGRS Costing Model (Draft V2)
EGRS Final Costing Report
EGRS I Wave 4 Final Report (2019)
EGRS I Wave 4 Final Report (Annexure D)

EGRS I Wave 4 Learning Brief (Final)
EGRS I Wave 4 Report (2019)
EGRS II – Case Study 2019
EGRS II Case Study 2018 (Final)
EGRS II EFAL Case Study 2017 (Final)
EGRS II Implementation Report (July 2019)
EGRS II Midline Report
EGRS II Qualitative Report (2018) – Coaching Mechanism

EGRS II Report (January 2019, V2)
EGRS Improvement Plan Progress Report (28 April 2020)
EGRS Summary Report
Final Baseline Report (EGRS II)
Implementing RSP Improvement Plan (March 2020)
National Framework for the Teaching of Reading in African Languages in the Foundation Phase (2020)
PIP Report (03 July 2017)
Operational Plan for RCMED 2023/24 and 2024/25
RCMED Advert (Director Position, May 2016)
Reading Benchmarks – Design Report (Final, 3 Feb 2020)
Reading Support Project (South Africa) – Formative Evaluation 2020
Research Agenda 2019-2023
RSP Annual Workplan (2020)
RSP Design Evaluation Report (14 Oct 2019)
RSP Quarterly Report (Oct-Dec 2019)
Summary of Evidence to Date – Presentation (Dr Taylor) Sector plan – Action Plan with RCMED mandate
TOR Coaching Course

Appendix 2: RCMED Directorate Operational Plan 2023-**2024**

Presented below is part of the operational plan. The full plan includes additional information not shared here, pertaining to budget and dependencies from other stakeholders, as well as allocating responsibility to team members and indicating timelines for deliverables. The extract serves to indicate the range of tasks performed by the RCME Directorate in delivering on its official mandate.

	1. Branch and sector support provided
1.1	Research, monitoring and evaluation support to DBE branches: DBE branches are supported i.e. Branch D (ECD function improvement; ECD Results- Based Financing Initiative); Branch C (Competency Framework Design); Branch T (PYEI; Whole School Evaluation reading assessments); Branch C (EGRA; Contribution to Matric report); Roadshows to the branches (Sasa); Matric Second Chance Programme; Branch A (Electricity research); Branch S (CSTL)
1.2	Support to other governmental departments and entities (DWCPD evaluation; DPME Evaluation Advisory Committee; DSD Evaluation of teenage pregnancy programmes)
1.3	Sectoral support to donors and partners including UNICEF, USAID and Zenex Foundation
1.4	Support to the NECT: Participate and support the National Reading Coalition & Lead REALS SA M&E Task Team, PSRIP
	2. Medium-to-long term monitoring of the sector undertaken
2.1	A GHS report is approved and published on DBE website
2.2	FUNS - Funda Uphumelele National (Reading) Survey
2.3	A sector monitoring survey is completed for 2022
2.4	District level analysis: Survey of districts (to understand PED support to districts; numbers of district officials; etc.); dropout and repetition rates (LURITS) - get other info from Mr Tshabalala (Juliette Namethe)
2.5	ECD Early Years index - technical support
2.6	Ongoing sector analysis and sector reviews, articles, book chapters or policy briefs on specific topics, such as ICTs in education, learner repetition & dropout etc.; the use of libraries; (re) analysis of SMS, TIMSS, PIRLS, SACMEQ, NSC; Full term reviews, Handover Reports, 30 year-review (Oct-March 2024)
	3. Research, monitoring and evaluation coordinated through internal and inter-provincial structures
3.1	3 meetings are held annually for the HEDCOM Subcommittee on Planning, Monitoring and Evaluation. Involves organisation and facilitation of meetings i.e., agenda development, reporting, committee management outside meetings, capacity building on planning, monitoring and evaluation.
3.2	DBE officials trained on quantitative and qualitative methods/a reading group is hosted quarterly; STATA tuts
3.3	Provinces are supported through capacity building workshops led by RCMED twice a year
3.4	DBE Research Agenda is accessible on the DBE website and updated annually
3.5	DBE Research repository is accessible on the DBE website and updated annually
3.6	Respond to research requests: All research requests are responded to within 14 days
3.7	Co-chair ECD M&E Intersectoral Committee
3.8	Practice notes on undertaking research, monitoring and evaluations are developed and published on the DBE website

	4. Research and evaluations in the sector undertaken
4.1	Evaluate the EGRS I and RSP: EGRS 1 publication(s); RSP impact evaluation; Public release of data
4.2	Implement scale-up of EGRS I: The Early Grade Reading Programme is successfully implemented in North West Dr RSM District
4.3	A Foundation Phase Literacy Coaching course is developed and accredited. Training of the second cohort commences.
4.4	Implement the Reading Improvement Plan: Support the development a structured learning programme in all African Languages; Support provinces with the implementation of a structured learning programme in the African Languages (GATES/UNICEF Proposal)
4.5	Develop reading norms and benchmarks in all Languages of Learning and Teaching (LoLTs) and EFAL
4.6	Early Grade Mathematics Research Project: A review of early grade mathematics assessments and LTSM; Annual Research Indabas; TARL Pilot
4.7	Participating in research, monitoring and evaluation activities with internal and external stakeholders: Research is presented at conferences
	5. National and international reporting requirements responded to
5.1	Respond to national reporting requirements including Parliamentary requests
5.2	Respond to international reporting requirements, including SDG and AU goals; Collaborate and implement MOUs with other countries (Kenya, Zimbabwe).
5.3	Represent South Africa on the SACMEQ scientific committee: Attend meetings as requested
5.4	Inputs to speeches and responding to the media: Provide inputs as requested

Appendix 3: RCME Directorate selected outputs 2014-**2024**

RCME Directorate output 2014 - 2024: Examples of reports or other products	
1	**Branch support**
1.1	Report on closing of small schools 2025
1.2	Evaluation of MTBBE workbook versioning 2024
1.3	Evaluation of REALS SA project 2023
2	**Medium- to long-term sector monitoring**
2.1	School Monitoring Surveys of 2017 and 2022 (each round had about 6 different reports)
2.2	Annually the GHS report: Focus on Schooling
2.3	25-year review of basic education
2.4	Mid-term review 2022
2.5	30-year review 2024
3	**Coordinating research, monitoring and evaluation activities in the sector**
3.1	Processing of 195 research requests 2015-2023
3.2	Publishing a research agenda, research repository and COVID research repository
4	**Undertake research, monitoring and evaluation**
4.1	Evaluation of Funza Lushaka Bursary Programme 2016;
4.2	Evaluation of the Teaching Maths with Understanding Framework 2019;
4.3	Evaluation of CAPS implementation 2015
4.4	Review of maths LTSM and Assessments 2023
5	**National and International reporting**
5.1	Contribute to SDG Country Progress reports, 2019, 2023
5.2	Report on the Continental Activities (African Union)
5.3	UNESCO Spotlight Study focusing on maths (2023)
5.4	Situational Analysis in DBE Annual Report (every year)
5.5	Analysis of the State of the Nation Address (presented to Parliament annually)
5.6	Numerous short reports on dropout rates