

07/2025

2025/11/19

## VERVROEGDE AFTREDE SONDER PENALISASIE EN VRYWILLIGE AFTREDE

1. Die SAOU Noord-Kaap het heelwat navrae gekry rakende die verskillende opsies soos hierbo genoem. Ongelukkig was die inligting daaromtrent baie min en kon ons dit nie regverdig om onbevestigde inligting rond te stuur nie.

2. Die Departement van Basiese Onderwys het onlangs tydens 'n opleidingssessie die volgende bevestig:

- Daar is TWEE aftree opsies op die tafel, nl :  
 (i) Vervroegde Aftrede Sonder Penalisasie vir opvoeders in die ouderdomme van 55 jaar tot (en ingesluit) 59 jaar, (ii) Vrywillige Aftrede vir opvoeders in die ouderdomme van 60 jaar tot (en ingesluit) 63.
- Die beginsel van "sonder penalisasie" is presies wat dit beteken: Aansoekers in die twee kategorieë hierbo genoem word nie gepeenaliseer omdat u vroeër as wat die Wet op Indiensneming van Opvoeders vereis aftree nie.
- Alhoewel u nie gepeenaliseer word nie, is daar ook 'n ander waarheid: U tree af op die ouderdom waarop u is, u kry geen pensioendraende jare by nie.
- U behou voorts alle voordele soos by 'n normale aftrede, met inbegrip van mediese subsidie, pro-rata diensbonus ens.
- Die Staat gee wel as 'n insentief; 'n enkel, ten volle belasbare kontantbedrag aan die suksesvolle aansoekers.
- Dis baie belangrik om daarop te let dat die kontantbedrag nie deel vorm van u pensioen nie en daar is ook nie 'n opsie om dit deel te maak van u pensioen nie.
- Die kontantbedrag word as volg bereken: (i) Aansoekers 55-59: Twee weke se salaris vir elk van die eerste 20 jaar van pensioendraende diens, asook 1 week se salaris vir elke jaar daarna tot met die beoogde aftrede. (ii) Aansoekers 60-63: Twee weke se salaris vir elk van die eerste 10 jaar van pensioendraende diens, asook een week vir elke jaar daarna tot en met die beoogde aftrede.
- Die Staat se projek van aftrede sonder penalisasie gaan oor twee finansiële jare strek, t.w. (i) 2025 / 2026 – waarvoor die sluitingsdatum 30

## EARLY RETIREMENT WITHOUT PENALISATION AND VOLUNTARY RETIREMENT

1. The SAOU NC has received numerous enquiries with regards to the different retirement options as indicated here above. Understandably we had very little information ourselves and would it be of no use to send out untested and hearsay information.

2. At a most recent information and training session by the Department of Basic Education, the employer confirmed the following:

- There are TWO retirement options to choose from: (i) Early Retirement without Penalisation for educators aged 55 years up to and including 59 years. (ii) Voluntary Retirement for educators aged 60 years up to and including 63 years.
- The principle of "without penalisation" is exactly what it means: Applicants in the two categories here above are not penalised at all for exiting the employ of the Department as set out in the Employment of Educator's Act.
- Despite not being penalised, the truth of the matter is that the applicant will retire on the age he/she applied for – full stop. No pension, nor pensionable service years are added to your profile.
- Upon early retirement, or upon voluntary retirement, the applicant will be eligible for all the benefits linked to a normal retirement, such as medical subsidy – to name but one.
- Apart from keeping all the normal benefits, the Government will pay an additional taxable incentive to successful applicants.
- Please note that the cash incentive does not form part of your pension and it is not an option to link it towards your pension.
- The incentive is calculated as follows: (i) Applicants 55-59: Two weeks' basic salary for the first completed 20 years of pensionable service and one week's basic salary for each completed year of pensionable service thereafter. (ii) Applicants 60-63: Two weeks' basic salary for the first completed 10 years of pensionable service and one week's basic salary for each completed year of pensionable service thereafter.

November 2025 is en (ii) 2026 / 2027 wat op 1 Maart 2026 in werking tree.

3. Die Departement van Basiese Onderwys het besluit dat die volgende kategorieë van skoolgebaseerde onderwysers van die projek uitgesluit sal wees:

- Opvoeders wat oor kritiese en skaars vaardighede beskik en die volgende vakke aanbied:
  - (i) Die sg STEM-vakke (Science, Technology, Engineering and Mathematics).
  - (ii) Kunste
  - (iii) Kodering en Robotika
  - (iv) Afrikaans – beide as vak en as Taal van Leer & Onderrig.
  - (v) Afrikatale in die Grondslagfase
  - (vi) Alle opvoeders in die Grondslagfase
  - (vii) Skoolgebaseerde Terapeute, Sielkundiges en Beraders

4. Om aansoek te doen vir een van die Aftreepsies hierbo uiteengesit, moet u die meegaande vorm voltooi ([klik hier](#) om toegang tot die vorm te verkry) en by u naaste Distrikskantoor inhandig voor / op 30 November 2025.

• The Government's project for early retirement and voluntary retirement will span over two financial years (i) 2025 / 2026 – with the closing date for applications on 30 November 2025 and (ii) 2026 / 2027, starting on 1 March 2027.

3. The Department of Basic Education has excluded the following categories of school-based educators from applying:

- Teachers possessing critical AND scarce skills as well as those qualified in, or teaching
  - (i) STEM subjects
  - (ii) Arts
  - (iii) Coding and Robotics
  - (iv) Afrikaans both as a subject and as LoLT.
  - (v) African Languages at Foundation Phase
  - (vi) All educators in the Foundation Phase
  - (vii) School-based Therapists, Psychologists and Councillors.

4. To apply for one of the two options as indicated here above, applicants must complete the application form ([click](#) on the link to gain access) and hand it in at the District Office on or before 30 November 2025.

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