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REALISING THE RIGHT TO BASIC EDUCATION IN SOUTH AFRICA

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An update of the policy effort, resource allocation & enjoyment of the right to Basic Education in South Africa

Monitoring the Progressive Realisation of Socio-Economic Rights Project
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PREFACE

The **Studies in Poverty and Inequality Institute** (SPII) is an independent research think tank that focuses on generating new knowledge, information and analysis in the field of poverty and inequality studies.

This working paper has been undertaken as part of the 'Monitoring the progressive realisation of socio-economic rights' project conducted by SPII with the support of Foundation for Human Rights and the endorsement from the South African Human Rights Commission (SAHRC).

The objective of this project through the combination of policy and budget analysis and statistical indicators is to provide a comprehensive framework and set of tools to monitor the progressive realisation of socio-economic rights. It is hoped that this project will be a useful tool for policy makers, for those that exercise oversight over the executive, including Parliament and Chapter Nine institutions (notably the SAHRC), and civil society.

ACKNOWLEDGMENTS

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Please contact **Russell Wildeman** (russellwildeman529@gmail.com) or **Isobel Frye** (isobel@spii.org.za) for any questions, queries or requests, including around the data used for the paper, which we are happy to provide.

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ACRONYMS

ASIDI	Accelerated Schools Infrastructure Development Initiative
CPI	Consumer Price Index
DBE	Department of Basic Education
ECD	Early Childhood Development
EFA	Education for All
EIG	Education Infrastructure Grant
GDP	Gross Domestic Product
GRADE R	Grade Reception
MTEF	Medium Term Expenditure Framework
NEIMS	National Education Infrastructure Management System
PED	Provincial Education Department
PIRLS	Progress in International Reading Study
SCA	Supreme Court of Appeal
SIBG	Schools Infrastructure Backlogs Grant
SPII	Studies in Poverty and Inequality Institute
UNCRC	United Nations Conventions on the Rights of the Child

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CHAPTER ONE:

1. INTRODUCTION

The right to basic education is one of the cornerstone socio-economic rights in the Constitution of the Republic of South Africa. Section 29(1) states that

"Everyone has the right -
(a) to a basic education, including adult basic education; and
(b) to further education, which the state, through reasonable measures, must make progressively available and accessible."

The Preamble to the South African Schools Act of 1996 (Act No. 84 of 1996) further contextualises the right to a basic education by declaring

> ***Whereas the achievement of democracy in South Africa has consigned to history the past system of education which was based on racial inequality and segregation; and Whereas this country requires a new national system for schools which will redress past injustices in educational provision, provide an education of progressively high quality for all learners and in so doing lay a strong foundation for the development of all our people's talents and capabilities.***

While these are noble and ambitious intentions, it is important to assess whether the implementation and delivery of basic education in contemporary South Africa live up to these high ideals. As such, this paper will explore whether the ideals expressed in the Constitution, and as embedded in relevant education legislation, are being realised.

Anecdotal evidence, legal challenges to the government's delivery and funding of basic education, and consistent below-average results in international assessments of student achievement all cast doubt on the extent of the progress made in realising the right to basic education. In its wide-ranging and comprehensive assessment of the implementation of the right to basic education in 2014, the Studies in Poverty and Inequality Institute (SPII) concluded that although enrolment in the compulsory phase of education is near-universal, there are grave concerns about the *quality* of education. These findings matter because they have a direct role in realising the transformative charge captured in the Preamble to the South African Schools Act. While the distribution of quality educational outcomes must become more equitable to give material effect to the right to basic education, the provision of education should be examined for its inputs, processes and outcomes, instead of a slavish focus on outcomes only. The need remains, and is today perhaps even more pressing, to simultaneously champion concepts of access, adequacy and quality, and this is what this update seeks to do.

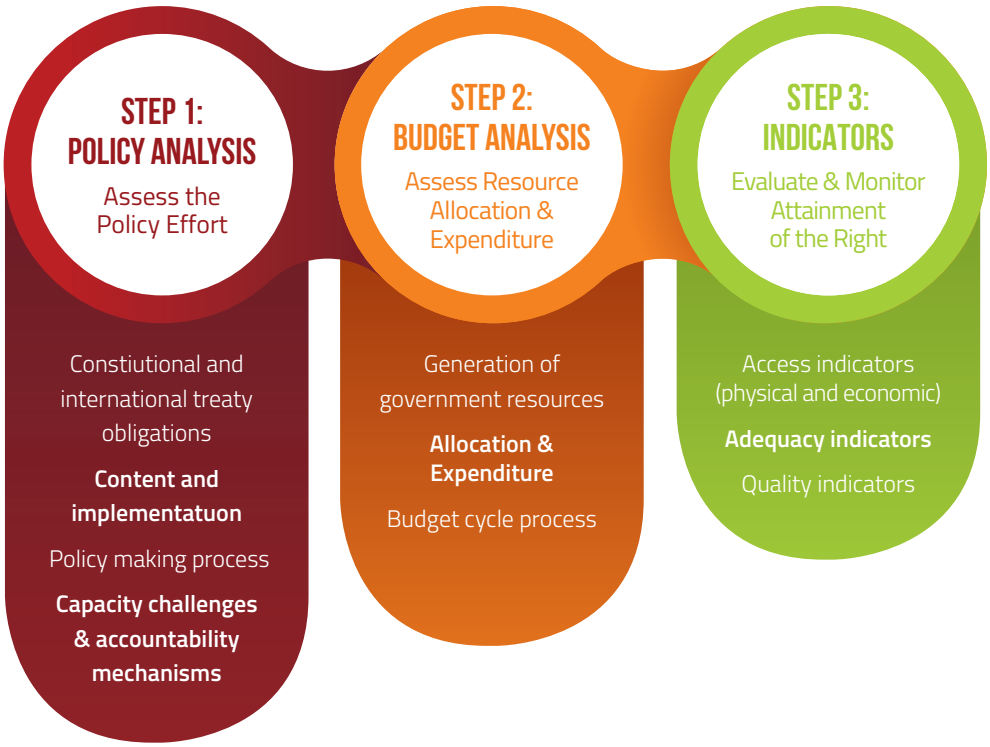
SPII has developed a three-step methodology to offer clarity on the realisation of socio-economic rights and to support advocacy interventions in this area. These steps include an analysis of the *policy effort* (Step 1), and the *allocation and expenditure of resources* for specific rights (Step 2). These two steps foreground the monitoring and evaluation of the *attainment of the rights* (Step 3) through specific outcome indicators.[1]

FOOTNOTES:

1. This section was taken directly from the SPII 2017 study on the Right to Housing.

1.2 3-STEP METHODOLOGY

Summary of the 3-step Methodology



STEP 1: ANALYSE THE POLICY EFFORT

The first step of the analysis takes a closer look at the underlying policies and legislation guiding the realisation of socio-economic rights (SERs). That is, it must be considered whether the actual content of social and economic policies adequately reflects the **Constitution and international treaty obligations** that the State has ratified.

This step also evaluates the **content and the implementation** of existing legislation, policy frameworks and government programmes to assess what funding, legislative, and service delivery gaps exist. A human rights framework guides this assessment. Vital to this step is an assessment of the **policy-making process** in terms of transparency and public participation by society and civil society organisations affected by the policy under review.

STEP 2: ASSESS RESOURCE ALLOCATION & EXPENDITURE

The second step assesses the reasonableness of budgetary priorities in light of the obligations and mandates of the specific sector. While both revenue and expenditure should be considered, in this report the analysis has focused on expenditure and proposed allocations and how the application of resources is likely to affect equity in the distribution of financial resources. Due to the human rights focus of the tool, special emphasis is placed on equity considerations and the extent to which financing policies address historical disadvantages and backlogs. While it is pertinent to consider budget process issues, these were not addressed in this shorter publication.

STEP 3: EVALUATE AND MONITOR THE ATTAINMENT OF SOCIO-ECONOMIC RIGHTS (SERS)

This step evaluates the State's performance via the development of statistical indicators, which provide a clearer and more precise illustration of the enjoyment of SERs over time. Three outcome indicators are used, namely right holders' access to basic education, the adequacy of the right to a basic education, and the quality of basic and further education provisioning. Data are usually drawn from nationally-representative surveys and disaggregation is emphasised to allow for better analysis and understanding of trends around equity markers.

In this report, an update of the SPII 2014 Right to Basic Education Report is provided. The update is not comprehensive but focuses on contextualising some of the gains and challenges since the first ground-breaking rights reports in 2014. It further assesses whether there are any new jurisprudential developments around the right to basic education, before presenting the latest allocation and expenditure information and updating a select number of indicators, based partly on the emerging issues in the basic education sector.

CHAPTER TWO:

DEVELOPING CONTENT OF THE RIGHT TO BASIC EDUCATION

The 2014 SPII report on basic education concluded that key tensions among essential stakeholders complicate the delivery and implementation of basic education. The report noted that this tension is caused, in part, because of the failure of the education system to produce a sufficient number of good schools that provide quality and relevant basic education. This leads well-run schools to resist attempts by provincial authorities to override their autonomy and important opportunities for progressive collaboration are foregone.

In its Concluding Observations, The United Nations Conventions on the Right of the Child (UNCRC, 2016)[2] puts forward several recommendations that the South African government should follow up on and implement. These include

- That the government develop and implement a framework law on the right to food and takes measures to strengthen effective monitoring of the National School Nutrition Programme;
- Removing barriers to accessing social security benefits and ensuring that children access these benefits in a timely manner;
- Ensuring consistent access to safe water and sanitation for all households, schools and health facilities;
- Enhancing efforts to provide free quality basic education and improving the quality of education, including the quality and availability of school facilities, educational materials, teaching staff, and curricula, with priority given to the most disadvantaged schools; and
- Improving the transparency, efficiency and accountability of the management of the budget for education through active and meaningful participation by key stakeholders.

Notable progress is being made with respect to the above recommendations, including the commissioning of a sanitation audit of all schools. In addition, an official report on the efficacy of the National School Nutrition Programme has been published,[3] while civil society and the National Treasury are working together on an online portal that promotes access to budgetary information in the various social services sectors.[4]

However, despite these gains, cases brought before various courts relating to access to resources that may improve the quality of schooling, as averred in the UNCRC's Concluding Observations, emphasise the nub of the 2014 SPII Right to Basic Education Report. For example, in *Madzozo vs the Minister of Basic Education*,[5] the High Court in the Eastern Cape ruled that the provincial education department was in breach of its obligations to deliver adequate school furniture to the affected learners and schools. The Court required that the provincial authorities provide school furniture that is adequate as well as age- and Grade-appropriate. In *Basic Education for All vs the Minister of Basic Education and Others*,[6] the Supreme Court of Appeal (SCA) ruled that the education authorities were in breach of their own national policy, which required that learners be furnished with textbooks at the commencement of the academic year. The fact that some learners in Limpopo Province did not have access to textbooks was deemed unfair discrimination and the Department of Basic Education was also instructed to comply with previous court rulings that mandated the department to ensure learners receive the necessary textbooks.

More recently, in *Equal Education vs the Minister of Basic Education and Others*,[7] the High Court in the Eastern Cape ruled that sections of the government's norms and standards for school infrastructure were unconstitutional.

FOOTNOTES:

2. In this regard, please see: https://tbinternet.ohchr.org/Treaties/CRC/Shared%20Documents/ZAF/CRC_C_ZAF_CO_2_25463_E.pdf
3. Department of Planning, Monitoring and Evaluation (2016) Report on the implementation evaluation of the national school nutrition programme.
4. Please see: https://imaliyethu.org.za/
5. Please see: https://www.escr-net.org/caselaw/2014/madzodzo-et-al-v-minister-basic-education-et-al
6. Please see: http://www.saflii.org/za/cases/ZASCA/2015/198.html
7. In this regard, please see: http://www.saflii.org/za/cases/ZAECBHC/2018/6.html

It also expanded the scope of schools that ought to be included in the Accelerated School Infrastructure Development Initiative (ASIDI) and requires that school infrastructure reports provided by provincial MECs for Education to the Minister of Basic Education be made public in a reasonable amount of time, to aid public oversight and scrutiny.

These are notable judgements that reinforce the primacy of the right to basic education and the government's constitutional obligation to comply with this high legal standard. It further buttresses this chapter's guiding idea that discussions concerning the right to basic education still must include issues of access and adequacy, even against a strong public current, which tends to limit the right to basic education to considerations of inequitable educational outcomes only.

CHAPTER THREE:
BASIC EDUCATION BUDGET ALLOCATIONS AND EXPENDITURES

3.1 INTRODUCTION AND OVERVIEW OF BUDGET ANALYSIS

Independent budget analyses have become an important feature of the work of organisations that pursue the fulfilment of the right to basic education. The usefulness of such work centres around its ability to elucidate up-to-date expenditure trends and to speculate about the implications of spending trends for poor and marginalised learners. It also allows for inter-provincial comparisons to gauge the extent to which poor and rural provinces have benefited from the existing funding dispensation. It is much harder, though, to establish inequality within provinces as this requires the careful use of survey data and access to data that provincial education departments do not publish routinely. Independent budget analyses can also be used to establish ongoing prioritisation of programmes and services that are vital for the realisation of children's right to basic education.

The focus of this publication's budget analysis is prioritisation and (inter-provincial) equity. Although a focus on prioritisation in a budget analysis exercise may seem self-evident, the recent adoption of a fiscal consolidation programme by the National Treasury – and the attendant sharp trade-offs it demands – requires greater vigilance concerning the primacy and sustainability of key social expenditures. This situation displaces the focus on the adequacy of budgets, because of competing priorities in a shrinking fiscal pie.

The provision of education services does not simply involve a transfer of resources but is concerned with both the quantity or level of resources and how resources are combined to produce the desired outcomes. It is thus appropriate to approach education budgets less as events and more as processes that are subject to fluctuations in the composition of spending. Unlike spending on social development, where the bulk of payments are unrequited payments to individuals and households, the delivery of basic education is labour-intensive and reliant on the supply of vital physical and learning infrastructure.

In what follows, an outline of spending and allocations in the consolidated basic education sector (spending inclusive of the national and provincial education departments) is provided. Thereafter, the ways in which the national Department of Basic Education, as a policy-making entity, promotes an anti-poverty agenda in provinces is discussed. To achieve this, provincial education budgets are analysed, first at an aggregate level, and thereafter a more detailed per capita analysis is considered for key programmes and services.

3.2 USE OF INFLATION DATA IN BUDGET ANALYSIS

Government budget data are usually presented in nominal terms, but to understand the effects of price increases on the purchasing power of education budgets, the analysis must adjust nominal (or current) numbers for the effects of inflation.

To promote comparisons with actual government data, budget data that are presented in tables are nominal numbers, with the last two columns indicating inflation-adjusted percentage change. The tables show changes from the last financial year (2017/18) and calculate a simple annual average growth rate over the Medium-Term Expenditure Framework (MTEF, 2017/18 to 2020/21). In instances where it is feasible, the analysis uses a six-year simple average annual growth rate.

While it is technically more desirable to use smoothed or weighted averages to hide the "noise" in fluctuating expenditure data, the analysis uses simple averages to make the resulting analyses comparable to those of the National Treasury and provincial governments, which continue to use simple growth rates.

Historical inflation data are extracted from the Statistics South Africa website, while projected inflation numbers are obtained from the National Treasury's *Budget Review 2018*. Fiscal-year, instead of calendar-year, inflation data are used. For this update, this means that the inflation data for 2014/15, 2015/16, and 2016/17 are actual fiscal-year inflation data, while data for 2017/18 and beyond are projections as referenced in the National Treasury's *Budget Review 2018*. The update uses 2014/15 as the technical base year, which is equivalent to saying that earlier and later financial data are expressed in 2014/15 Rands.

Table 1:

Consumer Price Index (CPI) deflators, 2013/14 to 2020/21 (2014/15 = 100)

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
CPI (%)	5.8%	5.6%	5.2%	6.3%	4.9%	5.5%	5.3%	5.5%
Deflator	0.95	1	1.05	1.12	1.17	1.24	1.30	1.37

Source: Statistics South Africa and Budget Review 2018 (own calculations)

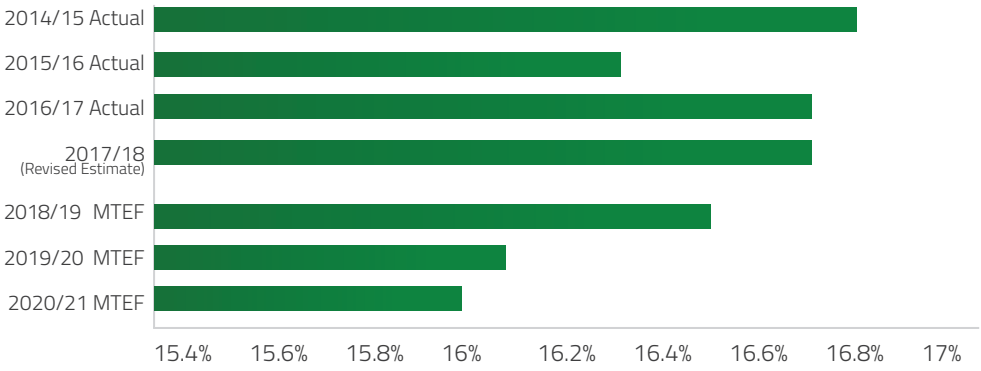
3.3 CONSOLIDATED BASIC EDUCATION BUDGET TRENDS, 2014/15 TO 2020/21

Consolidated basic education budgets are projected to decline from 16.8 per cent of government expenditure[8] in 2014/15 to 16.0 per cent in 2020/21 (Figure 1). In terms of international benchmarks for education spending, the Education for All (EFA) target suggests that 20 per cent of a country's budget should be spent on education. When the post-schooling education and training budgets are included in this calculation, South Africa spends between 21.0 and 23.0 per cent on average on its entire education budget.

Figure 1:

Consolidated basic education[9] as a percentage of consolidated government expenditure, 2014/15 to 2020/21 (%)

Source: Estimates of National Expenditure 2018 and Estimates of Provincial Revenue and Expenditure 2018



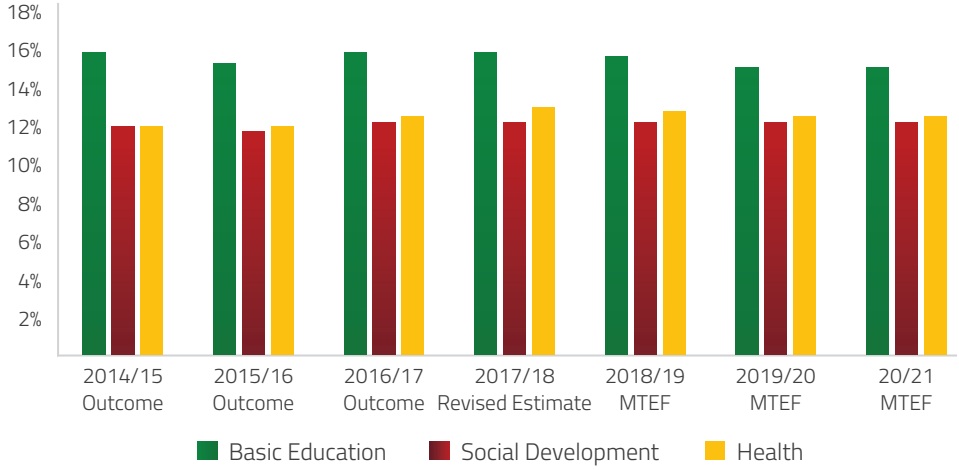
FOOTNOTES:

8. Consolidated government expenditure includes payments to national departments as well as provincial and local government transfers. Expenditures at the provincial level are inclusive of provinces' own revenues, but do not include local government revenues. Debt repayments are excluded from this total to establish the magnitude of spending devoted to service delivery, hence the term non-interest consolidated expenditure.
9. Consolidated basic education includes the budgets of the Department of Basic Education (DBE) and the nine provincial education departments (PEDs). Transfers from the DBE to PEDs (mainly conditional grants) have been netted out to avoid double-counting.

The decline in basic education's claim on the country's consolidated resources is to some extent explained by the rise in the share of consolidated health spending, which increases its share from 12.9 per cent in 2014/15 to 13.2 per cent in 2020/21 (Figure 2). The share of Social Development spending and allocations remains constant over the same period. While the post-schooling education and training sector is not represented in Figure 2 below, it is common knowledge that the rapid rise in the allocations to that sector has impacted negatively on the ability of basic education to garner much-needed resources.

Figure 2:
Social services budgets as a percentage of the consolidated government budget, 2014/15 to 2020/21 (%)

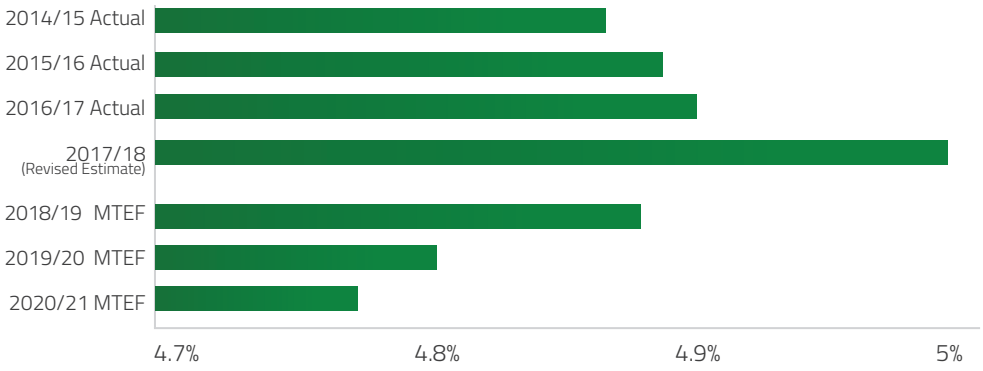
Source: Estimates of National Expenditure 2018 and Estimates of Provincial Revenue and Expenditure 2018 (own calculations)



South Africa's spending on basic education represents approximately 5.0 per cent of the country's Gross Domestic Product (GDP, Figure 3). This compares favourably with other middle-income countries such as Mauritius (5.0%), Kenya (5.3%) and Ghana (around 6.0%).[10] In terms of the widely-used target of 6.0 per cent of GDP spending on education, if the post-schooling education and training sector is factored into the calculation, then the country spends between 6.3 per cent and 6.6 per cent of its GDP on education.

Figure 3:
Consolidated basic education as a percentage of the country's Gross Domestic Product (GDP), 2014/15 to 2020/21 (%)

Source: Estimates of National Expenditure 2018 and Estimates of Provincial Revenue and Expenditure 2018 (own calculations)



Based on the initial analysis of consolidated basic education budgets, it is evident that South Africa meets the international benchmarks for education spending, whether it is 20% of total government spending, or 6% of its GDP.

It does not follow, however, that education budgets are adequate, have the right mix of inputs, or that education resources are contributing positively to educational outcomes. The analysis that follows focuses on the extent to which basic education spending for key programmes has been prioritised and whether there have been any improvements in terms of equity across different service delivery programmes that impact on the right to basic education.

FOOTNOTES:

10. See the UNESCO data portal. Available at: http://data.uis.unesco.org/

3.4 ANALYSING THE BUDGET OF THE DEPARTMENT OF BASIC EDUCATION, 2014/15 TO 2020/21

Expenditure and allocations in the budget of the Department of Basic Education are projected to grow from R19.5 billion in 2014/15 to R25.2 billion by the end of 2020/21 (Table 2).

In the present financial year, the proposed allocation declines in real terms (after inflation has been considered) by 4.0 per cent, while over the MTEF, the budget of the department is projected to decrease on average in real terms by 1.4 per cent. The Planning, Information and Assessment programme bears the largest real losses over the MTEF and is projected to decline by 3.0 per cent annually over the MTEF. The reduction in infrastructure spending on public schools is the main reason for the negative growth patterns in this programme and the budget of the department overall.

Table 2:

Expenditure and allocations by programme in the budget of the Department of Basic Education, 2014/15 to 2020/21 (ZAR Million, 2014/15 = 100)

	2014/15 Outcome	2015/16 Outcome	2016/17 Revised Estimate	2017/18 MTEF	2018/19 MTEF	2019/20 MTEF	2020/21 MTEF	Real change between 2017/18 and 2018/19 (%)	Real average annual change over MTEF (%)
Administration	381	386	418	427	450	484	514	0.1	0.9
Curriculum Policy, Support and Monitoring	1 685	1 798	1 827	1 783	1 905	2 010	2 138	1.3	0.8
Teachers, Education Human Resources and Institutional Development	1 314	1 164	1 177	1 252	1 290	1 366	1 443	-2.3	-0.6
Planning, Information and Assessment	10 429	11 512	11 720	12 233	11 971	12 247	13 072	-7.2	-3
Educational Enrichment Services	5 720	5 936	6 334	6 730	7 105	7 509	8 037	0.1	0.6
Total	**19 529**	**20 796**	**21 476**	**22 424**	**22 722**	**23 615**	**25 204**	**-4**	**-1.4**

Source: Estimates of National Expenditure 2018: Tables 14.2 and 14.3
Note: To promote readability, numbers have been rounded up.

Transfers to provincial education departments are not expected to grow above inflation and are projected to increase at the rate of the projected inflation (Table 3).

Given that the bulk of transfers to provincial education departments involve conditional grant spending (and especially spending on infrastructure), provincial education departments are unlikely to expand infrastructure or other key services at a faster rate. The expenditure data are also reflective of the government's desire to curb spending on Goods and Services (inclusive of consultants and travel) as part of its fiscal consolidation programme.

Table 3:

Expenditure by type in the budget of the Department of Basic Education,2014/15 to 2020/21 (ZAR Million, 2014/15 = 100)

	2014/15 Outcome	2015/16 Outcome	2016/17 Revised Estimate	2017/18 MTEF	2018/19 MTEF	2019/20 MTEF	2020/21 MTEF	Real change between 2017/18 and 2018/19 (%)	Real average annual change over MTEF (%)
Current payments	2 411	2 589	2 561	2 452	2 431	2 539	2 663	-6	-2.5
Compensation of employees	413	439	454	477	505	543	584	0.2	1.5
Goods and services	1 949	2 102	2 061	1 926	1 875	1 942	2 022	-7.7	-3.5
Interest and rent on land	49	48	46	49	51	54	57	0.3	0.2
Transfers and subsidies	14 687	16 819	17 846	18 504	18 953	19 887	21 691	-2.9	0
Provinces and municipalities	13 550	15 632	16 580	17 154	17 519	18 369	20 089	-3.2	0
Departmental agencies and accounts	108	113	124	135	145	156	165	2	1.4
Foreign govts and international orgs	17	21	19	18	19	20	21	-2.2	-0.8
Non-profit orgs	63	60	76	99	111	117	124	5.8	2
Households	949	992	1 047	1 097	1 159	1 224	1292	0.2	0.2
Payments for capital assets	2 426	1 388	1 063	1 469	1 338	1 189	850	-13.7	-20.5
Buildings and other fixed structures	2 421	1 383	1 057	1 460	1 329	1 178	838	-13.7	-20.7
Machinery and equipment	5	5	7	7	5	6	6	-28.4	-7.9
Software and intangible assets	0	0	0	2	4	5	5	46.4	30.3
Payments for financial assets	5	1	5						
Total	**19 529**	**20 796**	**21 476**	**22 424**	**22 722**	**23 615**	**25 204**	**-4**	**-1.4**

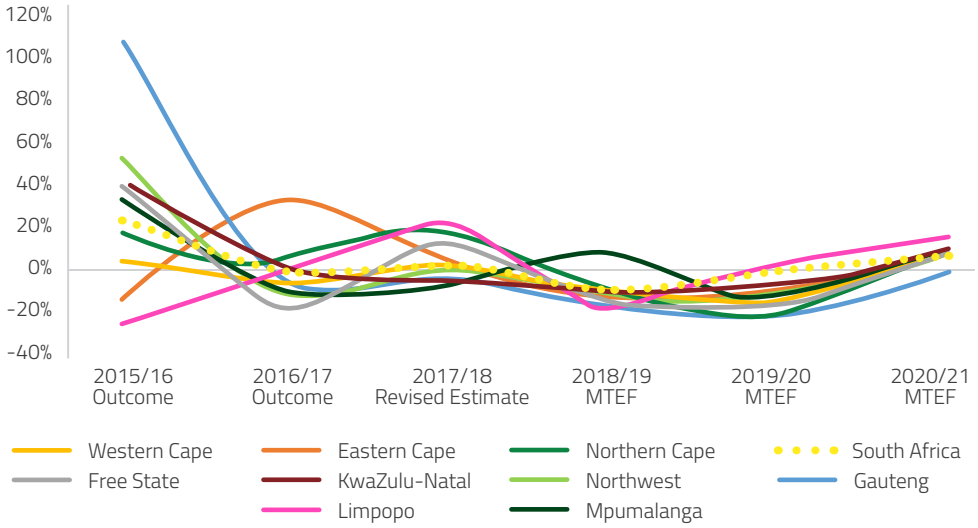
Source: Estimates of National Expenditure 2018:
Note: To promote readability, numbers have been rounded up.

While the budget of the Department of Basic Education reflects a spending total of R22.7 billion for the present financial year (2018/19), spending that is effectively within its control is just more than R5 billion. This is because of the large cash transfers that are made to provincial education departments. The contribution of the Department of Basic Education should thus be judged by the effectiveness of its oversight of this spending and the extent to which provincial education departments use these transfers to promote children's right of access to basic education.

Allocations on the Education Infrastructure Grant are projected to tail-off substantially over the MTEF, which is indicative of the resource constraints faced by the government (Figure 4). The graph shows that by 2020/21, most provincial education departments will grow their infrastructure budgets by the same margin, which has less to do with the accuracy of this projection but is reflective of the overall uncertainty in the fiscal environment. Learners in rural areas will be affected by the slowing down of the rate of spending, and infrastructure backlogs eradication will take much longer to complete.

Figure 4:
Real annual change on expenditure and allocations on the Education Infrastructure Grant by province, 2015/16 to 2020/21 (%, 2014/15 = 100)

Source: Estimates of Provincial Revenue and Expenditure 2018 (own calculations)

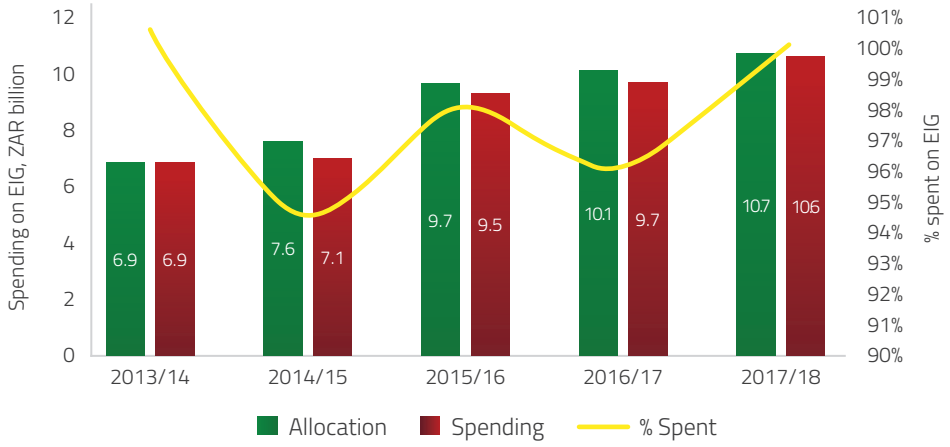


The reductions in the growth on the education infrastructure grant cannot be blamed solely on poor spending by provincial education departments. Figure 5 shows that provincial education departments managed to spend a sizeable portion of the conditional grant, which suggests that reports of under-spending are applicable to that portion of infrastructure spending financed by provinces' equitable shares and own revenues. Infrastructure grant spending has clearly been prioritised by provincial education departments and might reflect the dwindling provincial own contributions to infrastructure and their greater reliance on grant funding from the national level.[11]

Figure 5:
Expenditure trends on the Education Infrastructure Grant, 2013/14 to 2017/18

Source: National Treasury Presentation to Portfolio Committee on Basic Education, 30 May 2018

Note: The numbers provided are different from numbers in the official 2018 budget documents because official budget numbers use projected spending(December 2017 to March 2018)



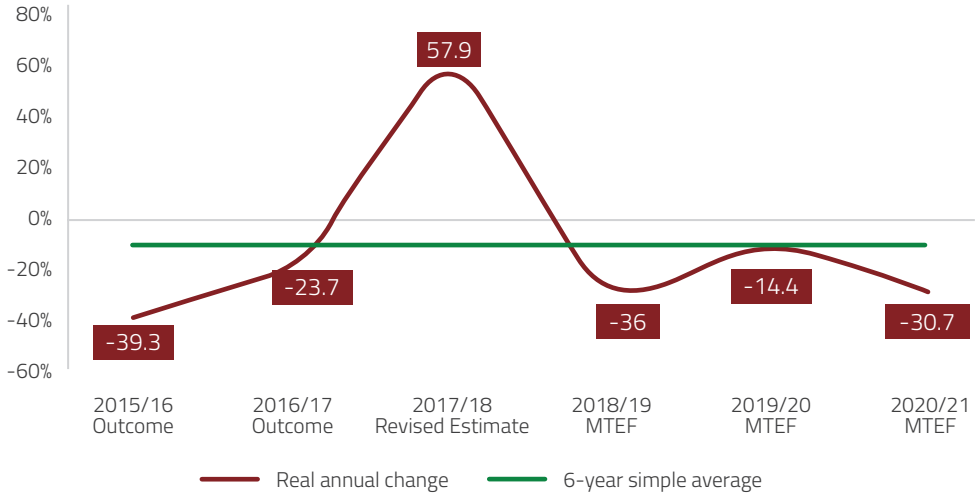
Whereas spending on infrastructure by provincial education departments can be considered efficient (as judged by actual spending ratios), spending of the indirect grant had been erratic due to challenges with managing intermediary service delivery agents (Figure 6). Large fluctuations in actual spending made it difficult for provincial education departments to plan and match enrolments to school sites, and this is not helped by projected allocations that lose more than a third of their values over the MTEF.

FOOTNOTES:

11. National Treasury Presentation to the Select Committee on Education, NCOP, 30 May 2018

Figure 6:
Real annual change on expenditure and allocations on the school backlogs infrastructure grant, 2015/16 to 2020/21 (%)

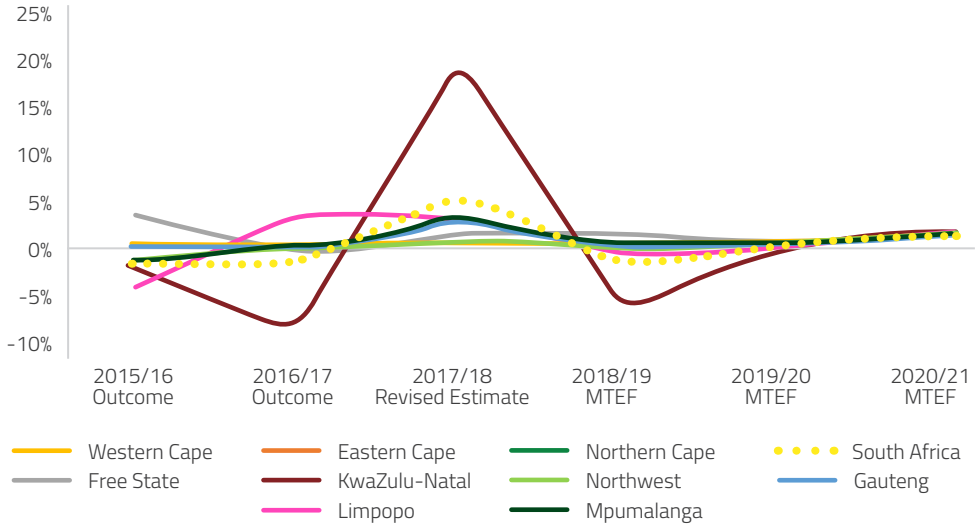
Source: Division of Revenue Bill 2018 (own calculations)



The planning approach that characterises the thinking behind the Education Infrastructure Grant is applied in the same way to the School Nutrition Grant (Figure 7). What this means is that over the present MTEF, the growth in allocations to provinces are assumed to be broadly the same, as graphically represented by the thick converging line for provincial allocations in Figure 7 below. As was indicated earlier, this is less a reflection of accurate planning and needs assumptions but has more to do with the uncertain fiscal environment in which the present budget was introduced.

Figure 7:
Real annual change on expenditure and allocations on the School Nutrition Grant by province, 2015/16 to 2020/21 (%, 2014/15 = 100)

Source: Estimates of Provincial Revenue and Expenditure 2018 (own calculations)



The overriding message from these analyses is that provinces must achieve more with the same or fewer human and financial resources. There is some evidence for provinces' capacity to utilise existing resources more effectively (for example, spending on the education infrastructure grant), but overall improvements in quality outcomes mute such optimism. In schools that require an expansion of resources to enable learners to cope with a demanding curriculum, the present policy of cutting expenditure may reverse important quality gains.

3.5 ANALYSING THE NINE PROVINCIAL EDUCATION BUDGETS, 2014/15 TO 2020/21

Expenditure and allocations on provincial education budgets are projected to grow from R182.3 billion in 2014/15 to R271 billion in 2020/21 (Table 4). Allocations for the present financial year are projected to grow in real terms by 0.2 per cent, while over the MTEF, basic education allocations are projected to grow by less than 1.0 per cent on average. Gauteng achieves the largest real average annual growth rate (1.2%) over the MTEF, while Free State and Mpumalanga project small real average declines on their proposed allocations. Overall, the numbers are indicative of maintenance budgets, which will have clear implications for the progressive resources and quality agenda in basic education.

Table 4:

Expenditure and allocations on provincial education budgets, 2014/15 to 2020/21 (ZAR billion)

	2014/15 Outcome	2015/16 Outcome	2016/17 Outcome	2017/18 Revised Estimate	2018/19 MTEF	2019/20 MTEF	2020/21 MTEF	Real change between 2017/18 and 2018/19 (%)	Real average annual change over MTEF (%)
Eastern Cape	27	28.4	31	33.3	34.8	36.8	39.3	-1.2	0.2
Free State	11	11.3	11.8	13.5	13.6	14.4	15.6	-4.9	-0.4
Gauteng	31.6	36.3	39.4	41.8	45.2	47.8	50.7	2.6	1.2
KwaZulu-Natal	39.3	43.1	45.9	48.3	50.9	53.8	57.9	0	0.8
Limpopo	24.4	25.1	26.8	29.3	30.5	32.3	34.2	-1.1	-0.1
Mpumalanga	15.7	17.1	17.8	19.5	21	21.8	23.2	1.8	0.5
Northern Cape	4.7	5.1	5.5	6.1	6.4	6.7	7.1	0.2	0
North West	12.1	13.1	14.1	15.3	16.2	17.1	18.5	0.5	1.1
Western Cape	16.6	17.6	19.3	20.7	22.2	23.1	24.5	1.5	0.4
Total	**182.3**	**197.2**	**211.6**	**227.8**	**240.8**	**253.8**	**271.2**	**0.2**	**0.5**

Source: Estimates of Provincial Revenue and Expenditure 2018 (own calculations)

Evidence of the tightness of budgets can best be gleaned by looking at the low growth trends in the Public Schools Programme, which is projected to grow by 1.0 per cent above inflation on average over the next three years (Table 5). Earlier observations about the reduction in infrastructure spending are directly applicable as this programme is projected to lose slightly more than 8.0 per cent on average annually for the next three years. Allocations to the Early Childhood Development (ECD) Programme do show upward growth (3.5 per cent above inflation on average), while allocations to the Special School Programme will have been boosted by the introduction of the special needs conditional grant.

Table 5:

Consolidated provincial education expenditure and allocations by programme, 2014/15 to 2020/21 (ZAR billion)

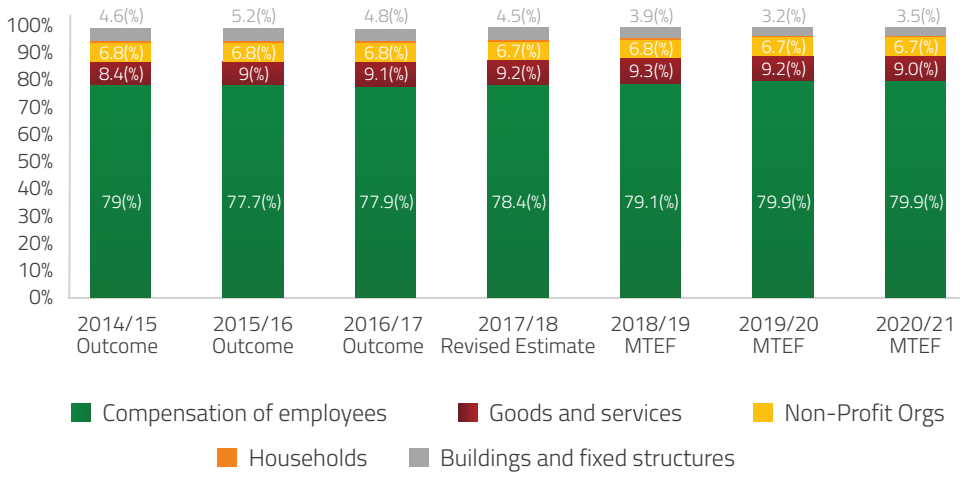
PROGRAMME	2014/15 Outcome	2015/16 Outcome	2016/17 Outcome	2017/18 Revised Estimate	2018/19 MTEF	2019/20 MTEF	2020/21 MTEF	Real change between 2017/18 and 2018/19 (%)	Real average annual change over MTEF (%)
Public Ordinary Schools	145.6	155.7	168.1	180.5	192	204.3	218.1	0.8	1
Independent School Subsidies	1	1.1	1.2	1.3	1.4	1.4	1.5	-0.6	-0.1
Public Special School Education	5.7	6.2	6.8	7.5	8.2	8.8	9.3	3.3	1.7
Early Childhood Development (ECD)	2.9	3.3	3.8	4.2	4.9	5.2	5.5	10.7	3.5
Infrastructure Development	10.1	12.8	12.4	12.9	11.6	10.3	11.4	-14.3	-8.3
Other	17.1	18.1	19.3	21.3	22.6	23.8	25.4	0.3	0.5
Total	**182.3**	**197.2**	**211.6**	**227.8**	**240.8**	**253.8**	**271.2**	**0.2**	**0.5**

Source: Estimates of Provincial Revenue and Expenditure 2018 (own calculations)

Compensation of employees makes up 80 per cent of total spending on basic education, while Goods and Services (inclusive of reserved allocations for non-section 21 schools) consume roughly 9.0 per cent over the same MTEF period (Figure 8). Transfers to non-profit organisations (inclusive of transfers to section 21 schools) remain just below 7.0 per cent of overall provincial spending and allocations, while spending on building and fixed structures is reduced from 5.2 per cent in 2015/16 to 3.5 per cent in 2020/21. Transfers to households (paying of past employee benefits, for example) make up less than 1.0 per cent of total spending over the period represented in Figure 8, below

Figure 8:
Composition of the consolidated provincial education budget by type of expenditure,2014/15 to 2020/21 (%)

Source: Estimates of Provincial Revenue and Expenditure 2018 (own calculations)



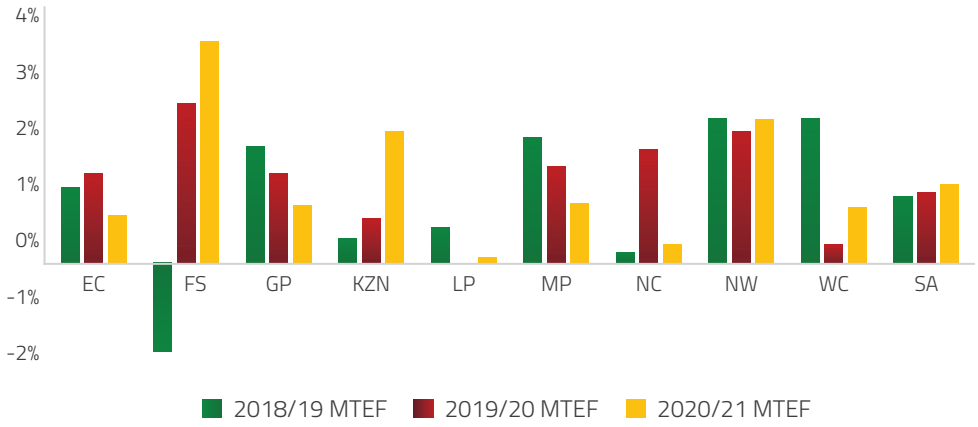
Overall, compensation budgets (inclusive of salary and employee benefits) are projected to grow by 1.1 per cent above inflation in 2018/19 (Figure 9). Provinces that deviate from this national average are Gauteng (1.8%), Mpumalanga (2.0%), North West (2.3%) and the Western Cape (2.4%). In view of the recently agreed public sector wage agreement,[12] compensation will consume a larger percentage of provincial education budgets in 2018/19 and over the remainder of the MTEF. However, the bulk of that impact will be felt in 2018/19, thus placing further pressures on provincial education service delivery programmes. Over the medium term, most provinces project growth numbers below the 1.0 per cent mark, but these are likely to change after the conclusions of wage discussions.

FOOTNOTES:

12. See "Majority of unions sign public sector wage agreement." Available at: https://www.fin24.com/Economy/Labour/just-in-majority-of-unions-sign-public-sector-wage-agreement-20180608

Figure 9: Real annual growth on provincial education departments' compensation budgets, 2017/18 to 2020/21 (2014/15 = 100)

Source: Estimates of Provincial Revenue and Expenditure 2018 (own calculations)



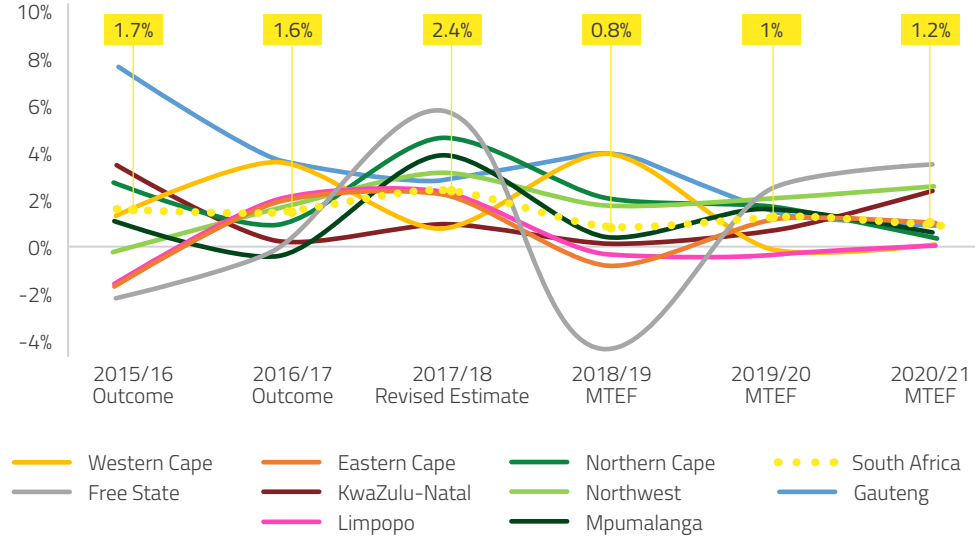
Analyses of provincial education departments' Annual Plans show that accumulating spending arrears and pressures on the compensation budgets are significant challenges. In view of the recently-approved wage increases and the tendency for provinces to compensate for their cash flow problems by using conditional grant resources, intense monitoring is required to ensure that key service delivery programmes are executed as per the relevant policy.

The Public Ordinary Schools Programme sustains its positive momentum over the six-year period depicted in the graph below, but it is also evident that there are large variations in how provinces spent between 2014/15 and the present financial year (Figure 10). The spending curve of Gauteng stands out and is reflective of that province's attempt to invest in much-needed personnel resources, whereas Free State has been going through a difficult time owing to its accumulating spending arrears and cash flow pressures. The range of growth rates over the MTEF is far more restricted, which is indicative of the pressure public schooling is under.

Figure 10: Real annual growth of expenditure and allocations on the Public Ordinary Schools Programme by province, 2014/15 to 2020/21 (%)

Source: Estimates of Provincial Revenue and Expenditure 2018 (own calculations)

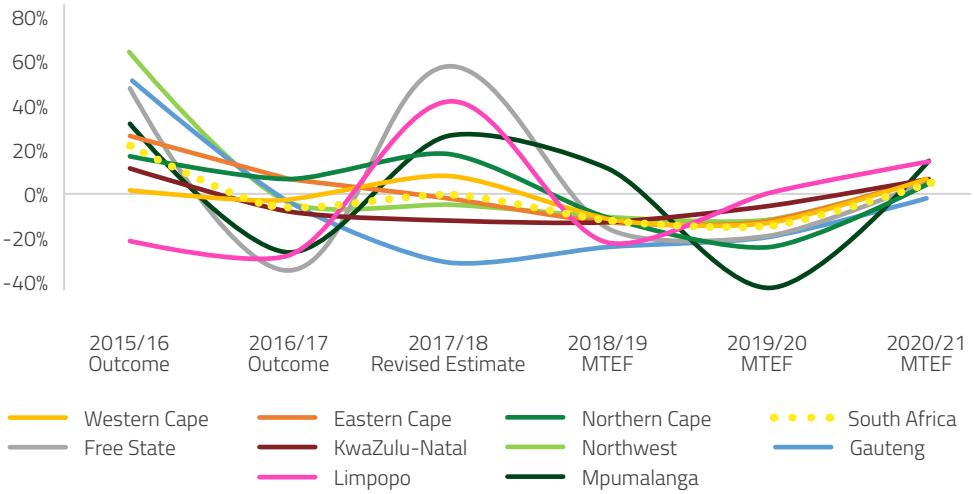
Note: The national real annual average for each of the fiscal years is labelled in the graph.



The contrast in spending trends on infrastructure in provincial education budgets is noticeable when the strong growth spurt in 2015/16 is compared with the negative and much lower rates of growth over the present MTEF (Figure 11). It is reasonable to assume that if the strong upwards spending on infrastructure had continued, given the strong spending record on the education infrastructure grant (which is the bulk of the spending above), provinces would be less pressurised to make important trade-offs between infrastructure, personnel and spending on private service providers.

Figure 11: Real annual growth of expenditure and allocations on the Infrastructure Programme by province, 2014/15 to 2020/21 (%)

Source: Estimates of Provincial Revenue and Expenditure 2018 (own calculations)



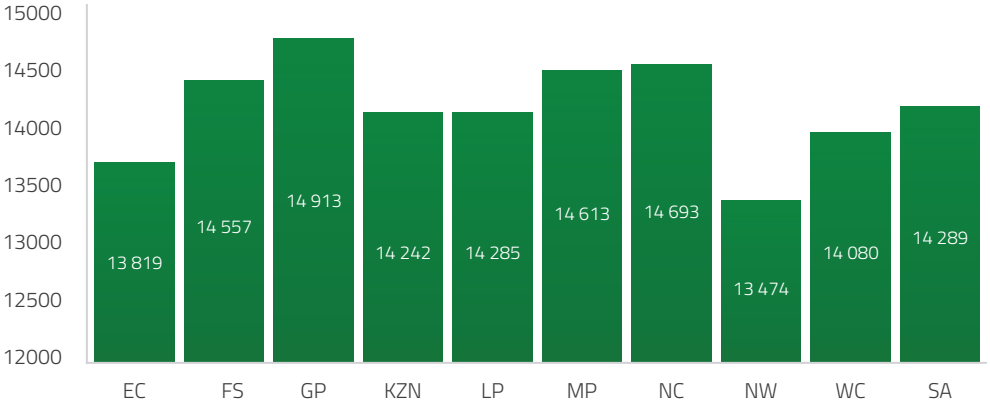
The analyses of aggregate spending and allocations patterns are important because they allow for the anticipation of the impact these proposals may have on broader service delivery areas. However, services are ultimately delivered to individuals who are based at various public institutions, and so the next tables and graphs focus on per learner spending across different programmes. Specific attention will be given to progress in achieving inter-provincial equity in spending.

In the Public Schools Programme, except for the North West province, the remaining provinces' per pupil allocations are clustered together, suggesting some form of per pupil convergence in spending in this programme (Figure 12). KwaZulu-Natal, North West and the Western Cape spent less than the national average, while per pupil spending in Gauteng almost breaches the R15,000 mark.

Figure 12: Inflation-adjusted per pupil spending on the Public Ordinary Schools Programme by province, 2016 (ZAR, 207/18 = 100)

Source: Estimates of Provincial Revenue and Expenditure 2018 (own calculations)

Note: There will always be a slight discrepancy in the calculated per pupil spending because the learner numbers are calendar data, whereas the expenditure data are fiscal year data



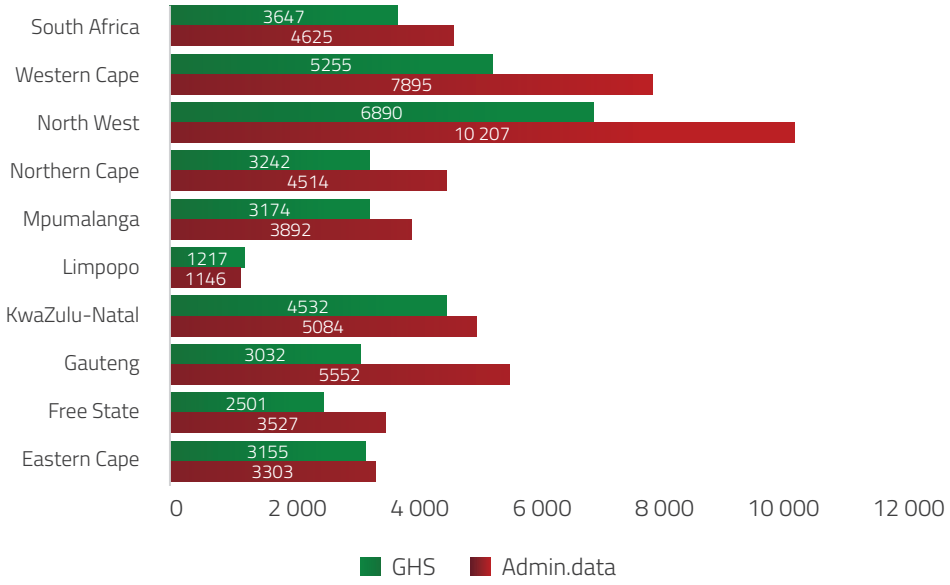
Unlike per pupil spending in public ordinary schools, spending varies substantially more around the national average for the Grade R Programme (Figure 13). The difference in per pupil spending generated by different source data is indicative of the extent to which provinces have been able to enrol all eligible six-year-olds in official Grade R programmes. Limpopo, for instance, has very similar per pupil expenditures for Grade R whether one uses actual enrolment data or population data. This suggests that most children who are eligible for Grade R are enrolled and they are enrolled in public Grade R programmes. In the case of the Western Cape, the difference between the official enrolment statistic and the population data is roughly 27.0 per cent, which is why the two per pupil numbers are so different. This does not imply that Western Cape has a lower enrolment rate of six-year-olds in Grade R than Limpopo, but it may also reflect the relatively larger private sector provision of ECD in that province. This

may apply equally well to Gauteng province. Noticeable also, if one were to compare per pupil spending levels in public schools with Grade R, is that the former is between 3 and 5 times the size of the latter. The difference is caused by the degree of formalisation related to the teaching personnel who operate in each of the sectors. The formalisation of Grade R teaching requirements is underway and will have a significant impact on future per pupil spending levels in this important sector.

Figure 13:
Per pupil spending on the Early Childhood Development Programme by province, 2015 and 2016 (ZAR)[13]

Source: Estimates of Provincial Revenue and Expenditure 2018 and General Household Survey 2016 (own calculations)

Note: There will always be a slight discrepancy in the calculated per pupil spending because the learner numbers are calendar data, whereas the expenditure data are fiscal year data. Population data for six-year-olds from the General Household Survey 2016 were applied to 2015 and 2016.



The difference in spending between Grade R Programmes and Public Ordinary Schools Programmes relates to various factors. On the one hand, the Public Ordinary Schools Programme is the most established programme in the provincial portfolio, due to its historical significance. Public ordinary schools additionally have well-qualified and well-paid public servants (mostly educators). On the other hand, ECD policy development only took off in 2001, and the Grade R Programme relies on professionals with vastly different qualifications and professional experiences. However, these vast differences are likely to stabilise in view of the function shift of ECD from Social Development to Basic Education.

These differences can be seen in measures that establish the degree of inequality in spending among provincial education departments for the two programmes (Table 6). All three measures provide an indication of just how much variation there is in provinces' spending on their respective Grade R learners, whereas the measures for public ordinary schools indicate almost perfect convergence or equality in the per pupil spending. The function shift of ECD from Social Development to education will support the equalisation project, even though the pace of that reform is likely to slow down in the present fiscal climate.

Table 6:

Comparing inequality measures[14] in public ordinary schools and Grade Reception in provincial education budgets, 2016

	Public schools	Grade reception
Coefficient of variation	0.0319	0.5332
Mean absolute deviation (in ZAR)	336	1,930
Per pupil expenditure in poor provinces as a factor of the national average	0.99	0.69

Source: Estimates of Provincial Revenue and Expenditure 2018 (own calculations)
Note: 'Poor provinces' refers to the Eastern Cape, KwaZulu-Natal and Limpopo.

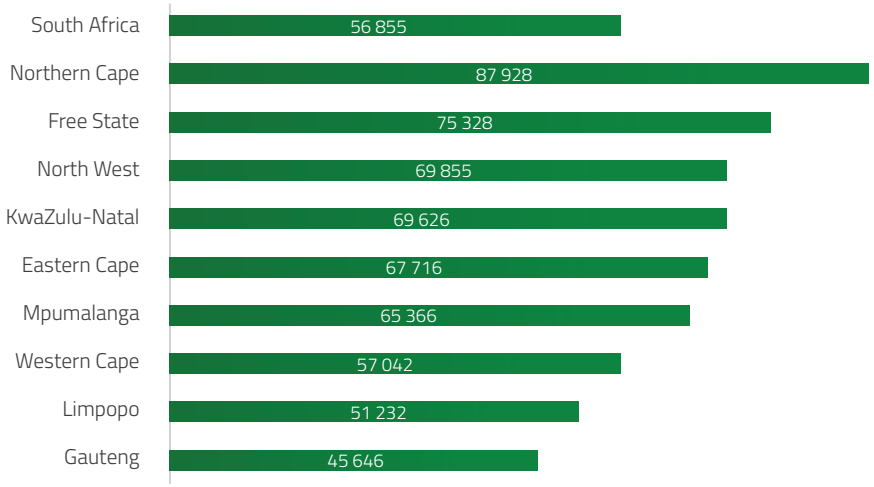
FOOTNOTES:

13. An assumption was made that Grade R classes are generally attended by pupils turning 6 in the year they attend Grade R classes. There are obvious deviations, but this should not radically distort the overall picture.
14. The coefficient of variation measures the degree of dispersion of data points around the mean, while the mean absolute deviation does something similar but ignores the sign of the deviation. Per pupil expenditure as a factor of the national average takes the average per pupil spending of the 'poorest' provinces and expresses this as a factor of the national per pupil average.

Per pupil spending on Public Special Needs Education Programmes varies substantially, with the Northern Cape spending almost twice as much as Gauteng (Figure 14). Differences in the incidence of disability, provinces' attempts to get learners with disabilities into their schools, and historical allocations are some of the reasons for the divergent per pupil spending in this programme. The introduction of the new conditional grant for learners with profound intellectual disabilities should help to address access inequalities, while providing some support for the small number of public schools that have enrolled such learners.

Figure 14: Per learner spending in Public Special Needs Education Programme by province, 2016

Source: Estimates of Provincial Revenue and Expenditure 2018 and DBE Presentation to Portfolio Committee on Basic Education, May 2017



Based on our brief review of trends in provincial education budgets, there are several areas that need to be highlighted. These include

An urgent need for provincial governments to devise a plan, in consultation with their service delivery departments, to contain, and eventually eliminate, spending arrears. This phenomenon destabilises public finance as it forces older payments to compete with present-year payments, thus compromising service delivery and spending schedules.

The national government needs to review its plans in cutting infrastructure grant spending, especially because provinces spent relatively well on their allocated conditional grant infrastructure spending.

The national government needs to reconsider the design of its funding support to provinces, as the conditional grant on infrastructure seems to crowd-out provinces' own contributions to infrastructure spending.

The upward curve in ECD and special needs education must be sustained, but efforts in this regard must be mindful of the kind of support the national government provides to provinces, and its ultimate impact on provinces' own incentives to spend on constitutionally-important areas.

Provincial education departments need to be provided with urgent capacity and support to better model the impact of wage increases on their service delivery programmes. This ought to facilitate better planning and management of departments' cash flow situations.

CHAPTER FOUR:
THE STATUS OF THE RIGHT TO BASIC EDUCATION: *WHAT THE INDICATORS TELL US*

The indicators presented in this chapter are not a comprehensive overview of all the indicators that were covered in the SPII 2014 report on the right to basic education. They do, however, cover all aspects of the three dimensions shown below. Some education indicators take much longer to change (for example participation rates in primary schools) and an in-depth exploration of this issue would not necessarily benefit this publication because of the expected marginal changes. Other indicators (such as access to quality infrastructure) are an ongoing public issue and should ideally be reflected in an update.

ACCESS

Access indicators refer to measurements that show the extent to which children and school-aged youth are able to attend schools that are physically and economically accessible to them, and that they are able to attend such schools free from discrimination on prohibited grounds.

ADEQUACY

Adequacy indicators measure the inputs that national and provincial governments provide to learners at schools, including qualified, trained and capable teachers, learning and teacher support materials, school infrastructure and the provision of adequate classroom space.

QUALITY

Quality indicators measure educational outcomes and the extent to which South Africa's education system has been able to produce and graduate learners from the system who are literate and numerate lifelong learners, prepared to succeed in higher education and in the workforce as well as capable of advancing the constitutional principles of social transformation, equality and freedom.

Table 7:
Indicators for the right to basic education

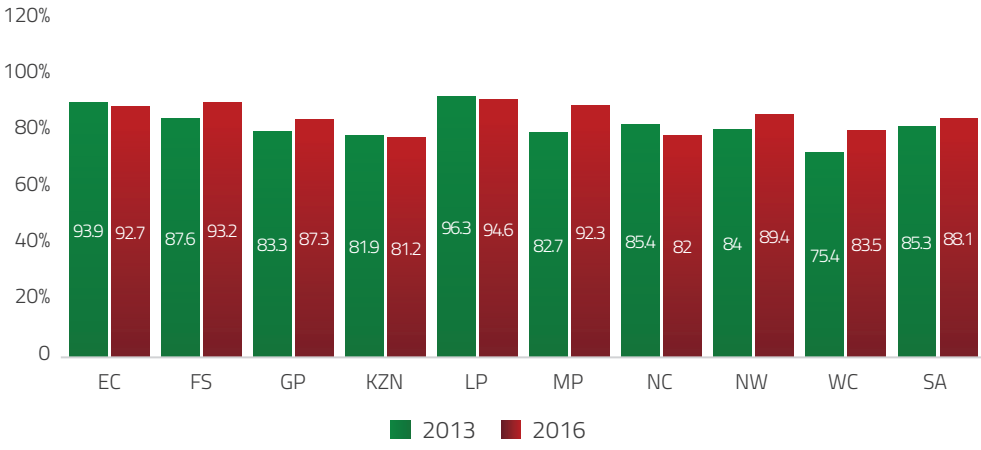
ACCESS		ADEQUACY		QUALITY	
SCHOOL ATTENDANCE		**TEACHERS AND LEARNERS**		**EDUCATIONAL ATTAINMENT**	
25	Percentage of 5-year-old children attending educational institutions by province, 2013 and 2016	31	Learner-educator ratio in public ordinary schools by provincial education department, 2016 and 2017	35	Percentage of 15-year-olds who have completed primary school, 2013, 2015 and 2016
26	Percentage of 7 to 15-year-old children attending an educational institution by province, 2013 and 2016	31	Percentage of schools with learner-educator ratios greater than 40, 2011 to 2017	35	Percentage distribution of highest level of educational attainment for persons 20 years of age and older, 2014 and 2016
26	Percentage of 7 to 15-year-old children attending an educational institution by province and gender in 2016	32	Percentage of schools with a permanently-appointed school principal, 2014	36	Percentage of adults aged 20 years and older who have completed Grade 9 and higher, 2013 to 2016
27	Percentage of 14 to 18-year-old children attending an educational institution by gender, 2013 and 2016	32	Percentage of schools with a permanently-appointed school principal by quintile, 2014	36	Percentage of adults aged 20 years and older who have completed Grade 12 and higher, 2014 to 2016
27	Percentage of 0 to 4-year-olds attending ECD facilities in 2013 and 2016	**LEARNER AND TEACHER SUPPORT MATERIALS**		**ADULT BASIC EDUCATION AND TRAINING**	
28	Percentage distribution of main reasons given by persons 7 to 18 years for not attending an educational institution by gender in 2016	33	Percentage of persons who attended Grades 10-12 in a public school, by their access to a textbook, by quarter, 2013-2015	37	Adult literacy rate by province for persons aged 20 and older, 2010 and 2016
SOCIAL SUPPORT PROGRAMMES		**SCHOOL INFRASTRUCTURE**		**NATIONAL SENIOR CERTIFICATE EXAMINATIONS**	
28	Percentage of those aged 5 years and older who attend educational institutions and do not pay school fees, 2010 to 2016	33	Percentage of schools without access to critical infrastructure, 2015 to 2017	37	National Senior Certificate Examination Bachelor passes as a percentage of overall passes by province in 2012, 2014, 2016 and 2017
		34	Percentage of schools with unacceptable and inadequate sanitation, 2018		

4.1 ACCESS INDICATORS

SCHOOL ATTENDANCE - *INDICATOR 1*

INDICATOR 1: Percentage of 5-year-old children attending educational institutions by province, 2013 and 2016

DATA SOURCE: General Household Survey 2013 and 2016



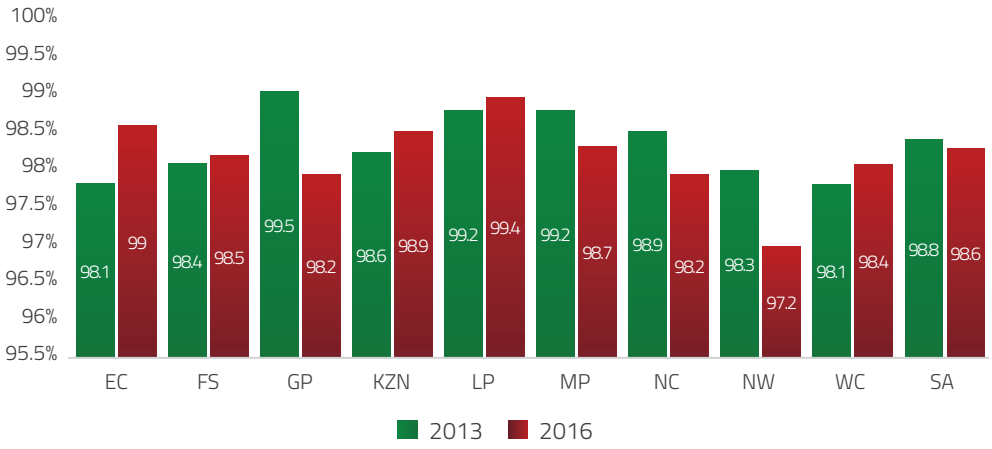
DESCRIPTION: This indicator measures the percentage of children who are 5 years old and are reported to attend an educational institution over the total population of 5-year-old children in 2013 and 2016.

Nationally, there appears to be an increase in the number of 5-year-olds that were attending educational institutions in 2016 as compared to 2013. More than 85 per cent of 5-year-olds attended educational institutions in 2013, while 88.1 per cent attended educational institutions in 2016. Worryingly, however, the data estimates a decline in the number of 5-year-olds attending educational institutions in three provinces, namely Eastern Cape (1.2% decline), Limpopo (1.7% decline), and Northern Cape (3.4% decline). Noticeable increases were recorded for the Free State (5.3% increase) and the Western Cape (8.1% increase).

SCHOOL ATTENDANCE - *INDICATOR 2*

INDICATOR 2:
Percentage of 7 to 15-year-old children attending an educational institution by province, 2013 and 2016

DATA SOURCE:
General Household Survey 2013 and 2016



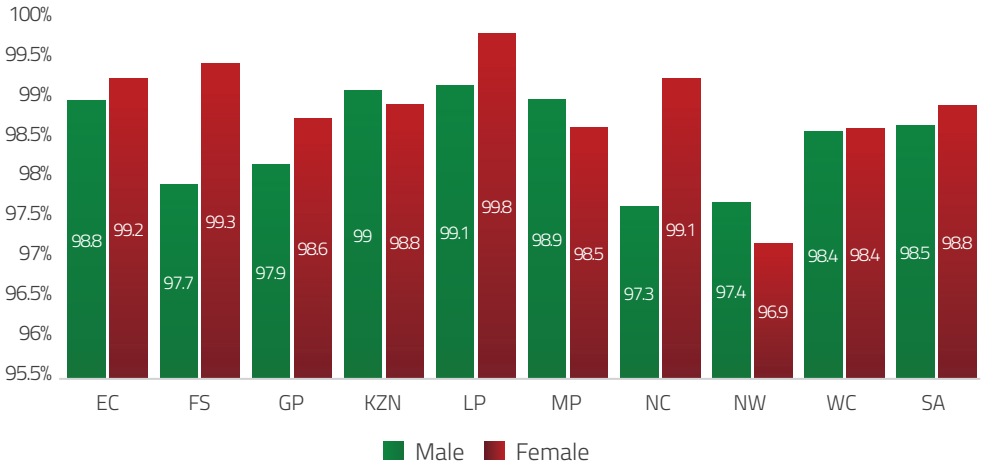
DESCRIPTION: This indicator tracks the participation of children in educational institutions during the compulsory phase of schooling (7-15 years). It is expressed as the total number of children (7-15 years) who are recorded as participating in an educational institution over the population total for children aged 7 to 15.

The indicator above is not restricted to any phase of schooling, but the data are indicative of near universal enrolment in public schools for children in the compulsory school-going age. As could be expected, there are no noticeable differences in participation in educational institutions (mostly schools) across provinces, and almost all provinces have seen a marginal increase in the percentage of school-going age children who attend educational institutions.

SCHOOL ATTENDANCE - *INDICATOR 3*

INDICATOR 3:
Percentage of 7 to 15-year-old children attending an educational institution by province and gender in 2016

DATA SOURCE:
General Household Survey 2016



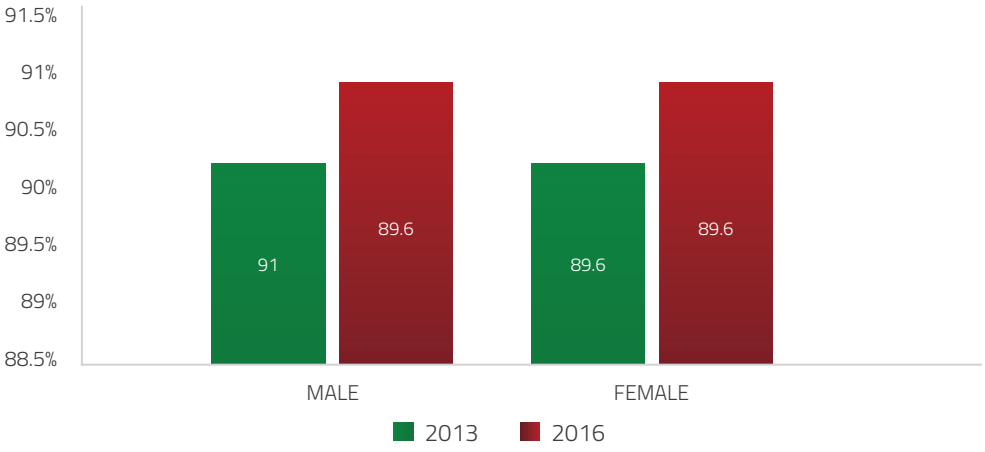
DESCRIPTION: This indicator tracks the participation of children in educational institutions during the compulsory phase of schooling (7-15 years). It disaggregates the information by gender and by province.

Nationally, roughly the same percentage of boys and girls attended educational institutions in 2016. This represents 99 per cent of all children between the ages of 7 and 15, and confirms the universal enrolment indicated in the previous graph. The situation is replicated across provinces where similar percentages of boys and girls were attending educational institutions in 2016.

SCHOOL ATTENDANCE - *INDICATOR 4*

INDICATOR 4: Percentage of 14 to 18-year-old children attending an educational institution by gender, 2013 and 2016

DATA SOURCE: General Household Survey 2013 and 2016



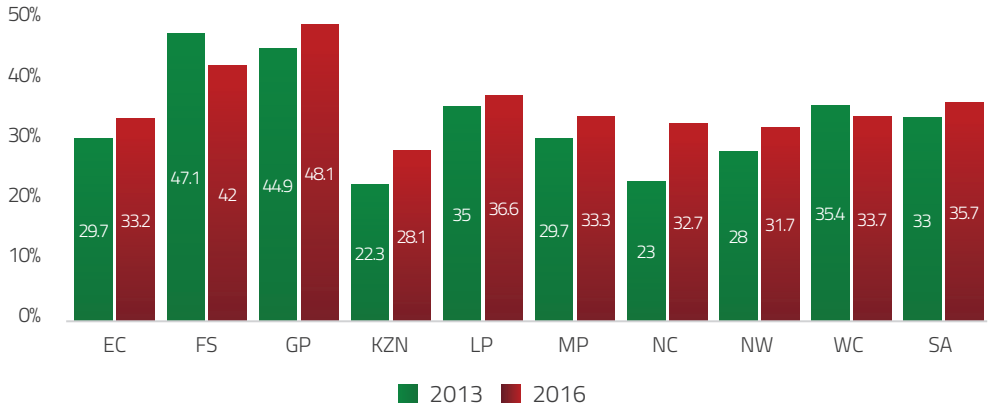
DESCRIPTION: This indicator tracks the participation of children in educational institutions who are between 14-18 years. It is expressed as the total number of children (14-18 years) who are recorded as participating in an educational institution over the population total for children aged 14 to 18.

Female learners between the ages of 14 and 18 achieved the same participation rate in education institutions between 2013 and 2016, whereas the participation rate of male learners declined slightly over the same period. Close to 90 per cent of learners between the ages of 14 and 18 are attending some educational institution, thus confirming earlier data about the high enrolment rates of both young children and children who enter the post-compulsory schooling phase.

SCHOOL ATTENDANCE - *INDICATOR 5*

INDICATOR 5: Percentage of 0 to 4-year-olds attending ECD facilities in 2013 and 2016

DATA SOURCE: General Household Survey 2013 and 2016



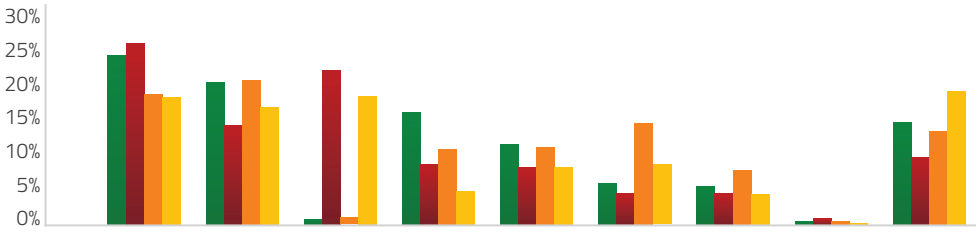
DESCRIPTION: This indicator tracks the participation of young children aged between 0-4 who attend any one of the following Early Childhood Development (ECD) facilities: a Grade Reception facility (public or private); a pre-school nursery school; an edu-care centre; or a crèche. It is expressed as the total number of children (0-4 years) who are recorded as participating in an ECD facility institution over the population total for children aged 0 to 4.

Nationally, more than one-third of young children attended an ECD facility in 2016, whereas the corresponding figure was one-third in 2013. Given that the government released an official ECD policy in 2001, much more work lies ahead as is reflected in the varying participation in ECD facilities across provinces. In 2016, almost half of young children between 0 and 4 attended an ECD facility in Gauteng, whereas less than 30 per cent of children attended ECD facilities in KwaZulu-Natal during the same period.

SCHOOL ATTENDANCE - *INDICATOR 6*

INDICATOR 6:
Percentage distribution of main reasons given by persons 7 to 18 years for not attending an educational institution by gender in 2016

DATA SOURCE:
General Household Survey 2016



	No money for fees	Poor academic performance	Family commit-ments	Education is useless	Illness & disability	Completed education	Working at home	Getting to school	Other
'13 Male	24.4	20.3	0.9	16.1	11.7	6.1	5.6	0.4	14.6
'13 Female	26.1	14.2	22.2	8.6	8.5	4.8	4.7	0.9	9.9
'16 Male	18.8	20.8	1.3	11	11.4	14.6	7.8	0.7	13.6
'16 Female	18.6	17	18.5	4.9	8.4	8.7	4.5	0.3	19.1

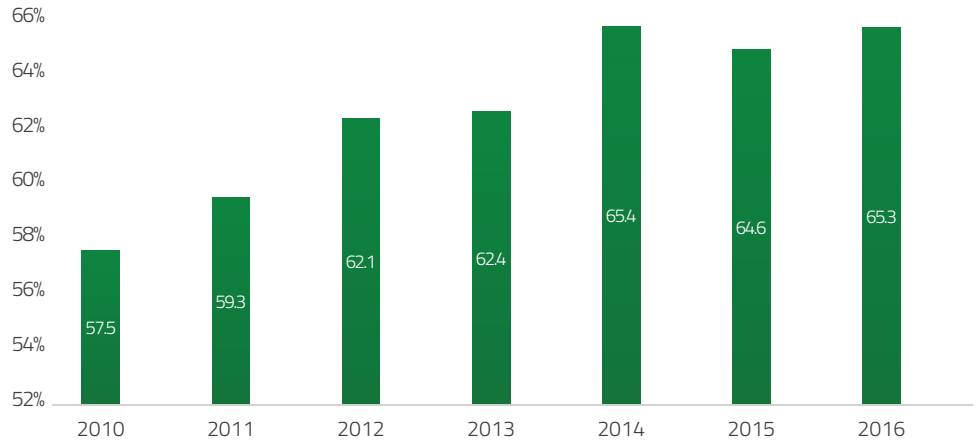
DESCRIPTION: This indicator tallies all the reasons given by those children (7-18 years) who do not attend educational institutions, and calculates the proportionate share for each of the reasons. This gives an understanding of the different subjective weights that non-attenders attach to not attending an educational institution.

There are some similarities in the reasons provided by male and female learners as to their non-attendance of educational institutions. In both 2013 and 2016, lack of access to financial means loomed large for male and females, while poor academic performance appeared to have discouraged both male and female learners from continuing with their attendance. There are notable differences in the family commitments factor where one-fifth of all females who do not attend educational institutions advanced family commitments as a reason while only 1 per cent of males indicated similar reasons. "Other reasons" include learners who have not been accepted for enrolment, violence at schools and pregnancy.

SOCIAL SUPPORT PROGRAMMES - *INDICATOR 7*

INDICATOR 7:
Percentage of those aged 5 years and older who attend educational institutions and do not pay school fees, 2010 to 2016

DATA SOURCE:
General Household Survey 2016



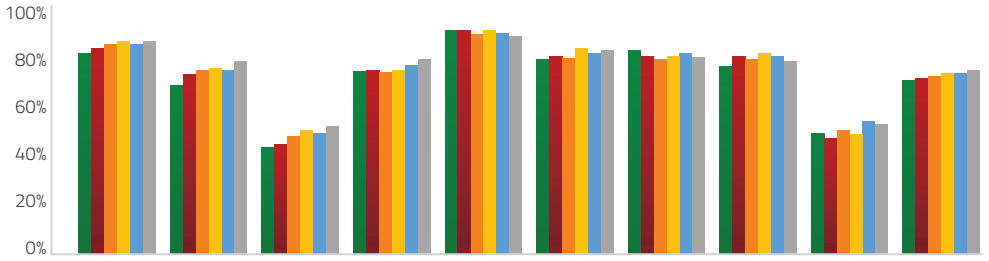
DESCRIPTION: This variable captures individuals aged 5 and older who do not pay school fees, including non-payment due to official governmental policies, refusal to pay fees, or simply lack of means to pay fees. Given the large percentage of learners who attend no-fee schools, the data are indicative of trends in the implementation of this school financing policy.

The percentage of those who attend educational institutions and who do not pay school fees has increased from approximately 58 per cent in 2010 to more than 65 per cent in 2016. The sustained increase over this period is indicative of the government's expansion of the number of no-fee public ordinary schools and provides strong evidence of the success in rolling out the school financing policies.

SOCIAL SUPPORT PROGRAMMES - *INDICATOR 8*

INDICATOR 8:
Percentage of learners who attend schools and who benefited from the School Nutrition Programme, 2011 to 2016

DATA SOURCE:
General Household Survey 2016



	EC	FS	GP	KZN	LP	MP	NC	NW	WC	SA
2011	84.3	71.5	44.5	76.7	94.6	82.4	86.1	78.8	50.4	73.1
2012	86.4	75.4	46.1	77.9	94	83.5	83	82.7	48.2	74
2013	88.4	77.3	49	76.9	93.2	83.2	82	81.5	51.9	74.5
2014	89.5	78.2	51.5	77.3	94	86.4	83.3	84.2	50.1	75.6
2015	89.2	78.1	50.4	79.5	94.1	84.8	84.8	83.6	55.1	76.2
2016	90	81	53.8	81.9	92.1	86.1	83	81.4	54	77.1

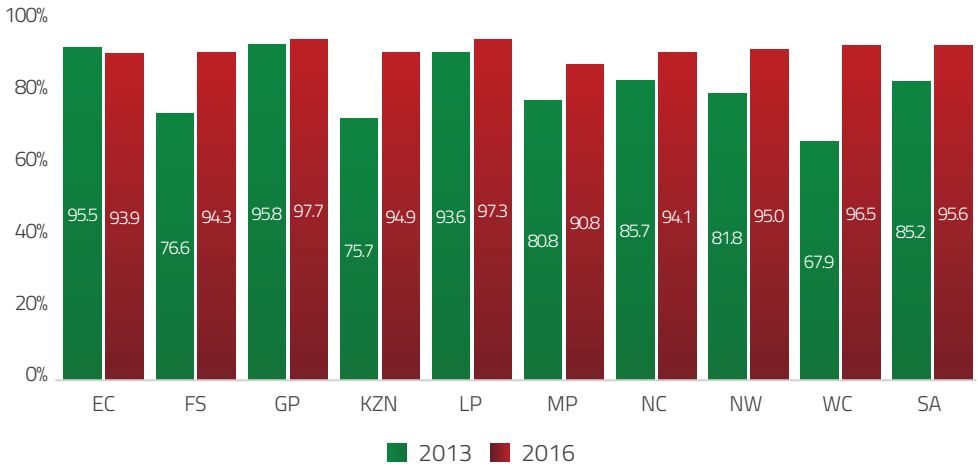
DESCRIPTION: This variable records the percentage of learners who attend public schools and who indicated that they benefit from the School Nutrition Programme.

Nationally, the percentage of learners who benefit from the provision of a government-sponsored School Nutrition Programme grows from 73.1 per cent in 2011 to 77.1 per cent in 2016. There are marked differences across provinces in terms of learner participation rates: More than 92 per cent of learners in Limpopo participated in the School Nutrition Programme in 2016, while just over half of learners participated in the programme in the Western Cape during the same period. Western Cape (54%) and Gauteng (53.8%) appear as outliers in a country where the clear majority of learners attending public schools benefit from the provision of a nutritious meal daily.

SPECIAL NEEDS EDUCATION ENROLMENT - *INDICATOR 9*

INDICATOR 9:
Proportion of 7 to 15-year-old children with disabilities attending educational institutions, by province in 2013 and 2016

DATA SOURCE:
General Household Survey 2013 and 2016

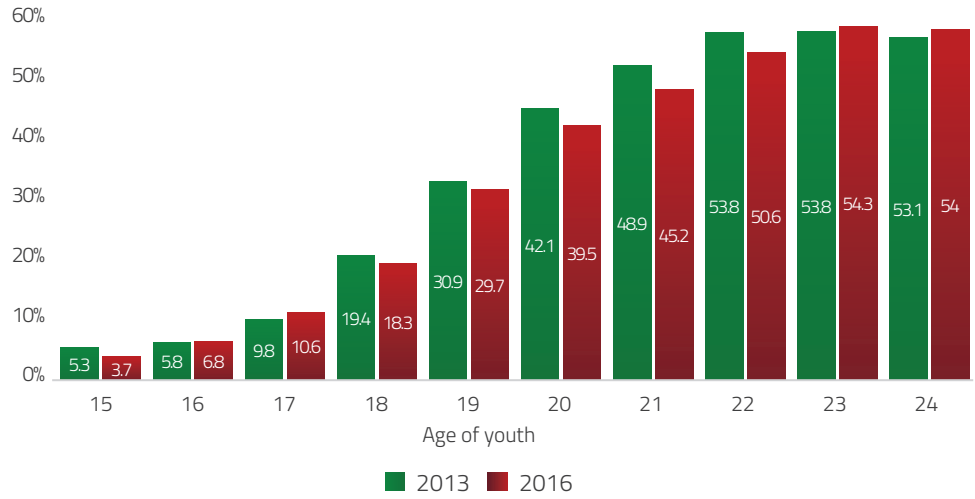


DESCRIPTION: This indicator tracks the number of children between the ages of 7 and 15 who indicated that they are attending educational institutions and who are reported as having a disability. The percentages reported below are reflective of those children with disabilities who have indicated that they do attend educational institutions, and do not represent the participation of all children who are reported as having a disability.

Nationally, the number of children with disabilities who are attending an educational institution has increased from 85.2 per cent in 2013 to 95.6 per cent in 2016. Except for the Eastern Cape, all provinces appeared to have made gains in this regard. In the Western Cape, the percentage of children with disabilities who attended educational institutions in 2013 was 68 per cent, while the corresponding tally in 2016 was boosted to 97 per cent. Similar improvements were achieved in KwaZulu-Natal.

INDICATOR 10:
Young people aged 15-24 not in employment, education and training (NEET), 2013, 2015 and 2016

DATA SOURCE:
Statistics South Africa, Labour Market Dynamics in South Africa 2016



DESCRIPTION: This indicator records the percentage of young people between the ages of 15 and 24 who are not employed, do not attend any recognised educational institutions, and are not in any of the recognised work-based training programmes.

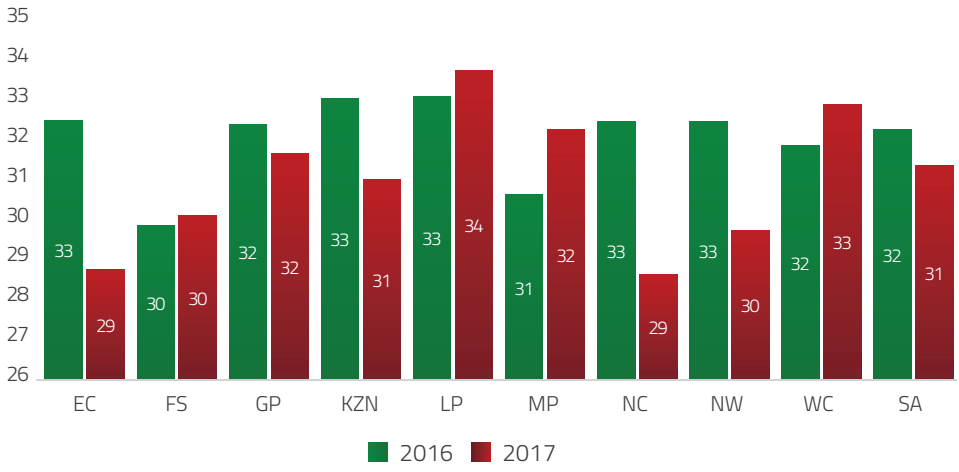
The trends in the graph above are predictable in that rather low percentages of young people who are not in school (those between 15 and 18) could be expected, while beyond secondary schooling, a significant spike is observed in young people who are not engaged in education, work or formal training. When young people reach the age of 22, more than half of that population are no longer engaged in education, training, or are unemployed, and these percentages appear representative of young people between the ages of 22 and 24. These are relatively large percentages in a country that can ill-afford to waste potential talents and contributions of young South Africans.

4.2 ADEQUACY INDICATORS

LEARNERS AND TEACHERS - *INDICATOR 11*

INDICATOR 11: Learner-educator ratio in public ordinary schools by provincial education department, 2016 and 2017

DATA SOURCE: Department of Basic Education, School Realities 2016 and 2017



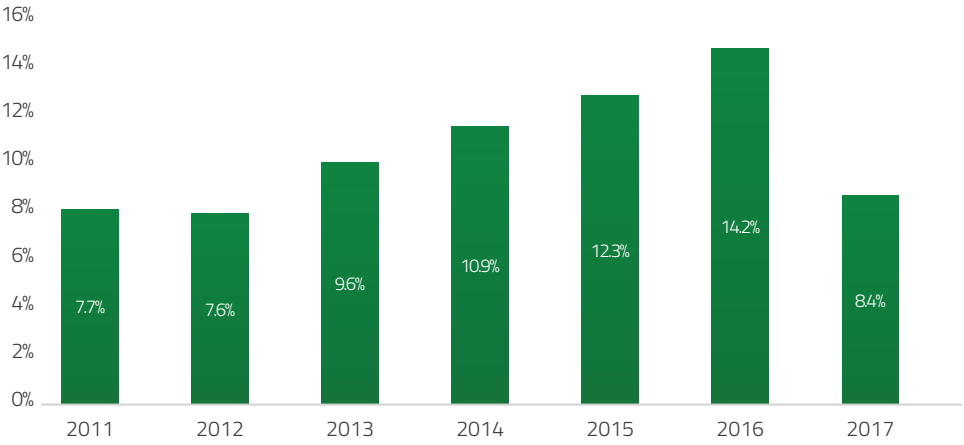
DESCRIPTION: The indicator measures the number of learners to the number of educators in public ordinary schools.

The national learner-educator ratio in 2016 was 32, while in 2017, it was 31 and most provincial average learner-educator ratios seem to cohere around the national average. The Eastern Cape and the Northern Cape have the lowest average learner-educator ratios in 2017 (29 respectively), while Limpopo has the highest average (34) over the same period. One should be mindful that averages hide wide discrepancies in actual learner-educator ratios experienced by schools.

LEARNERS AND TEACHERS - *INDICATOR 12*

INDICATOR 12: Percentage of schools with learner-educator ratios greater than 40, 2011 to 2017

DATA SOURCE: Department of Basic Education, School Realities 2011-2017



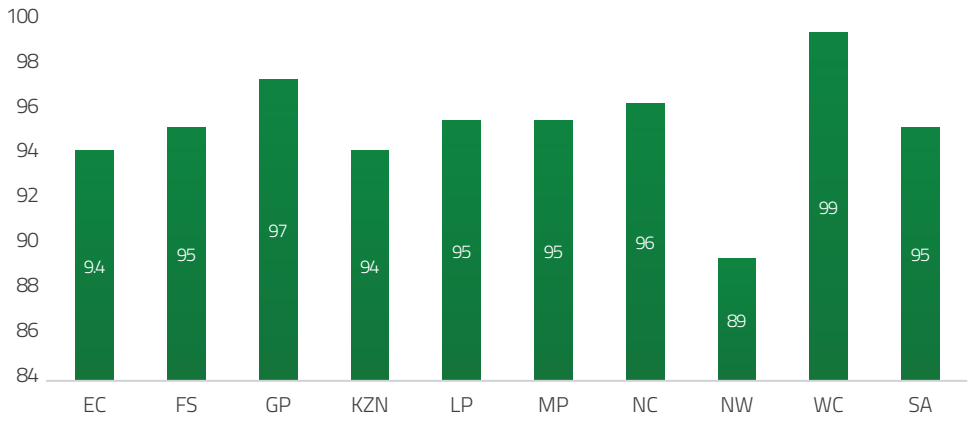
DESCRIPTION: The indicator measures the percentage of schools with learner-educator ratios larger than 40 learners to 1 educator.

Between 2012 and 2016, there was a growing number of schools that experienced learner-educator ratios larger than 40. In 2012, such schools numbered 7.6 per cent of all schools, while the corresponding figure in 2016 was more than 14 per cent. 2017 saw a drastic decline in the percentage of schools with large learner-educator ratios and this may be related to work that was done via the Accelerated School Infrastructure Programme or the additional spending that was done via the Education Infrastructure Grant.

LEARNERS AND TEACHERS - *INDICATOR 13*

INDICATOR 13: Percentage of schools with a permanently-appointed school principal, 2014

DATA SOURCE: Department of Basic Education, *Second Detailed Indicator Report for the Basic Education Sector*



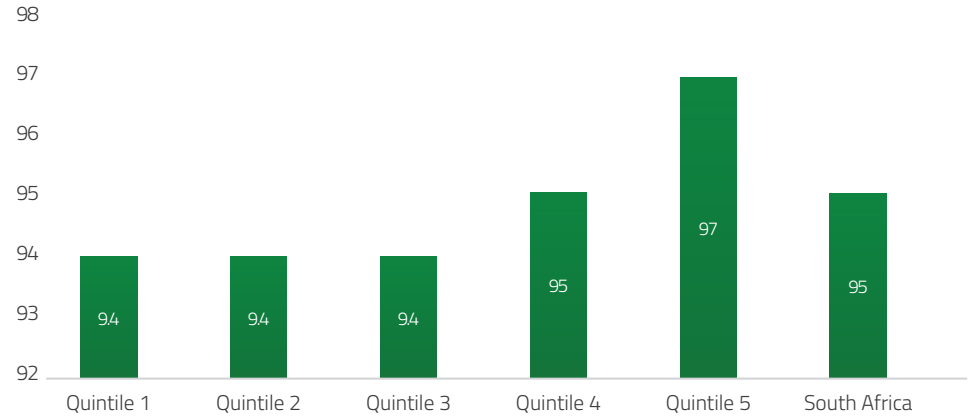
DESCRIPTION: This indicator records the percentage of schools that have a permanently-appointed principal at the time of the data collection schedule (2014).

Nationally, 95 per cent of schools had a permanently-appointed principal in 2014. However, the national average does not appear to apply in the North-West province, which only had 89 per cent of schools with a permanently-appointed principal. The Western Cape and Gauteng had the highest percentage of schools with a permanently-appointed principal at 99 per cent and 97 per cent respectively. This indicator is a proxy for the overall stability of schools.

LEARNERS AND TEACHERS - *INDICATOR 14*

INDICATOR 14: Percentage of schools with a permanently-appointed school principal by poverty quintile, 2014

DATA SOURCE: Department of Basic Education, *Second Detailed Indicator Report for the Basic Education Sector*

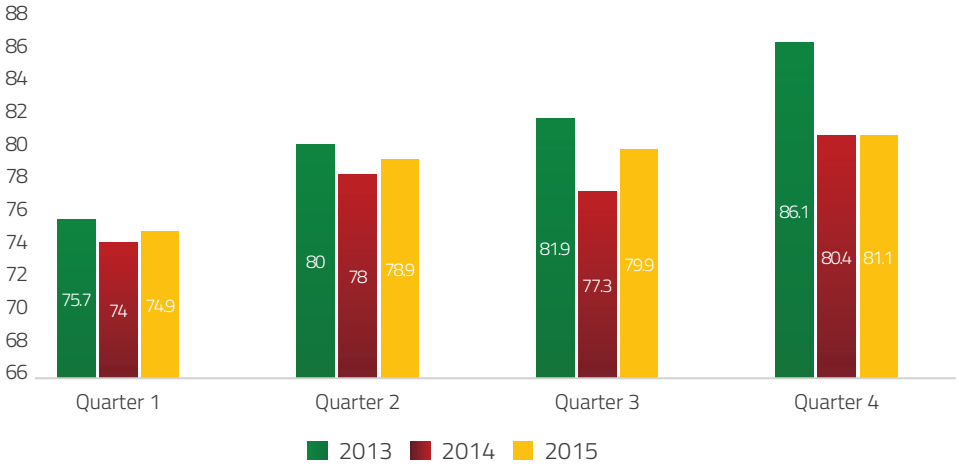


DESCRIPTION: This indicator records the percentage of schools that have a permanently-appointed principal at the time of the data collection schedule (2014).

LEARNER AND TEACHER SUPPORT MATERIAL - *INDICATOR 15*

INDICATOR 15:
Percentage of persons who attended Grades 10-12 in a public school by their access to a textbook by quarter, 2013 to 2015

DATA SOURCE:
General Household Survey, 2013 to 2015



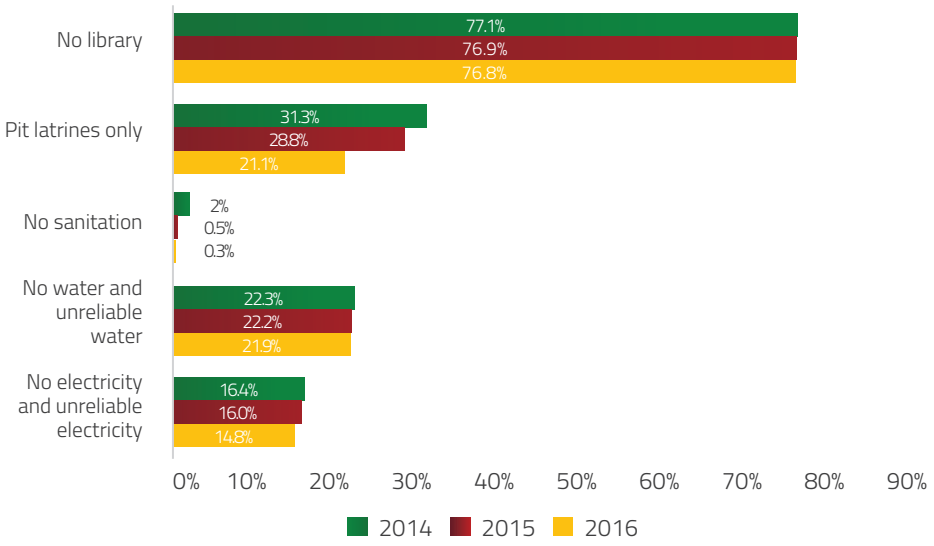
DESCRIPTION: This indicator tracks access to textbooks of those who attended Grades 10, 11 and 12 in a public school per quarter.

Approximately two-thirds of children have access to textbooks at the start of the academic year between 2013 and 2015. Their access to textbooks is progressively improved over the duration of the academic year, and by the final quarter of the year, learners have access to more than 80 per cent of the textbooks per these grades.

SCHOOL INFRASTRUCTURE - *INDICATOR 16*

INDICATOR 16:
Percentage of schools without access to critical infrastructure, 2015 to 2017

DATA SOURCE:
Department of Basic Education, National Education Infrastructure Management System (NEIMS), 2014 to 2016



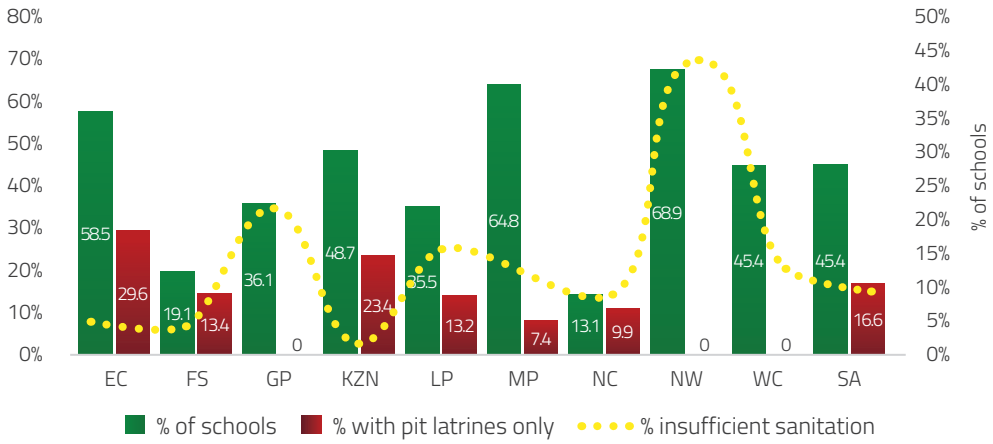
DESCRIPTION: Routine administrative tracking of critical infrastructure indicators by school and by projects within schools. Data are provided by provincial education departments and verified by the Department of Basic Education.

The data show a positive if slow rate of consistent decline in the percentage of schools that do not have access to critical infrastructure. Schools that only have access to pit latrines have been reduced from 31.3 per cent in 2014 to slightly more than 21 per cent in 2016. Only 0.3 per cent of schools did not have access to any sanitation in 2016, while 15 per cent of schools did not have access to electricity or a reliable supply of electricity. The one variable where no significant progress had been made is the provision of libraries and across the three years represented above, more than two-thirds of schools do not have access to a school library.

SCHOOL INFRASTRUCTURE - *INDICATOR 17*

INDICATOR 17:
Percentage of schools with unacceptable and inadequate sanitation, 2018

DATA SOURCE:
Department of Basic Education, Interim Sanitation Audit 2018



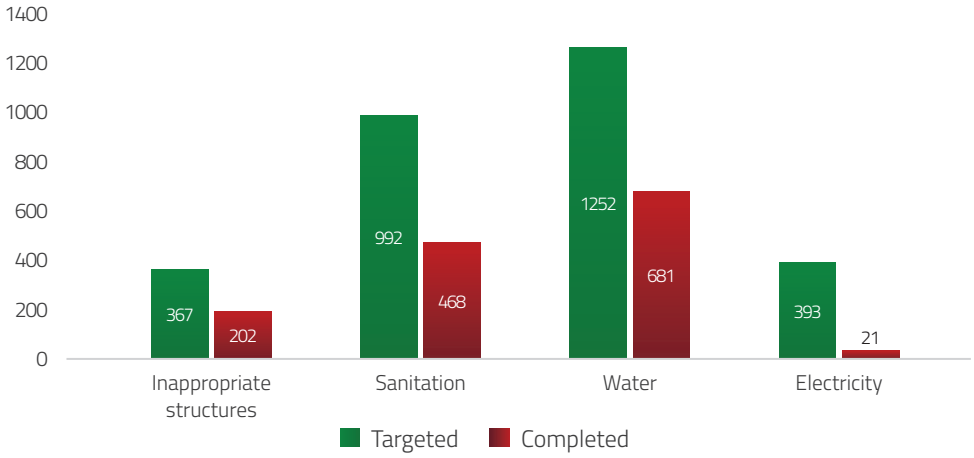
DESCRIPTION: This indicator records the provisional results of a sanitation audit, which was requested by the President of the Republic of South Africa and led by the Department of Basic Education. Data were obtained from schools in the nine provincial education departments.

Close to half of South African public schools (45.4%) indicated some issue with sanitation, thus drawing attention to the quality of the sanitation facilities. These schools are disproportionately represented in provinces such as the Eastern Cape, KwaZulu-Natal, Mpumalanga, the North-West and the Western Cape. The latest results also indicate that further progress was made regarding schools that have access to pit latrines only and this number now stands at 16.6 per cent of all schools. Nationally, 9.0 per cent of public schools are now classified as having insufficient sanitation (e.g., over-crowding) and this is particularly pronounced in the North-West province (44.4%), Gauteng (21%) and Limpopo (16%).

SCHOOL INFRASTRUCTURE - *INDICATOR 18*

INDICATOR 18:
Progress on the Accelerated School Infrastructure Delivery Initiative(ASIDI) in 2018

DATA SOURCE:
Department of Basic Education Presentation to the Select Committee on Appropriations, National Parliament, 2018



Note: The number for electricity progress represents 75% completion progress in selected school sites. The rest of the graph specifies number of projects as opposed to number of schools.

DESCRIPTION: The indicator provides data on progress made in tackling school infrastructure backlogs, which were done and committed through the School Infrastructure Backlogs Grants (SIBGs).

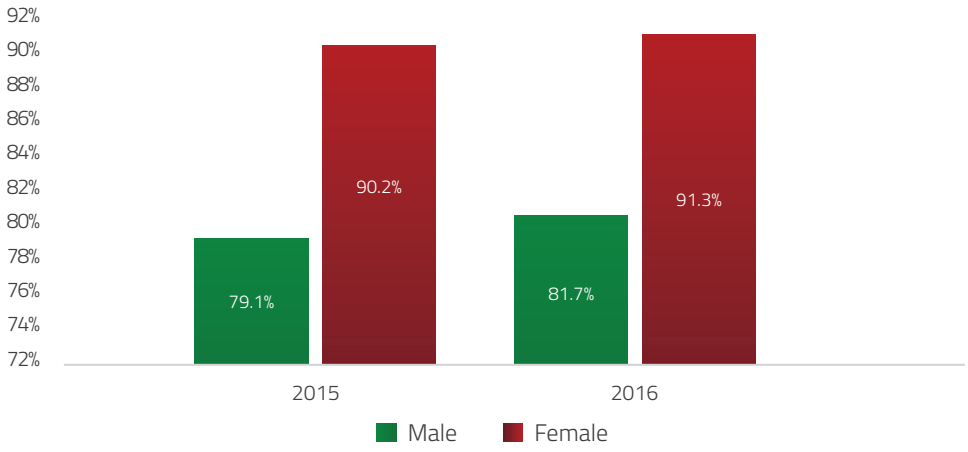
Of the 367 school structures that were deemed inappropriate, roughly 55 per cent of the project work was completed in 2018, while close to half of the sanitation progress was completed at the time of reporting (May 2018). Also, more than half of the water connections and projects were done at identified schools. Roughly 5 per cent of electricity projects were more than 75 per cent complete, but the progress of electricity projects leaves much to be desired.

4.4 QUALITY INDICATORS

EDUCATIONAL ATTAINMENT - *INDICATOR 19*

INDICATOR 19:
Percentage of 15-year-old boys and girls who have completed primary school and above in 2015 and 2016

DATA SOURCE:
General Household Surveys, 2015 and 2016



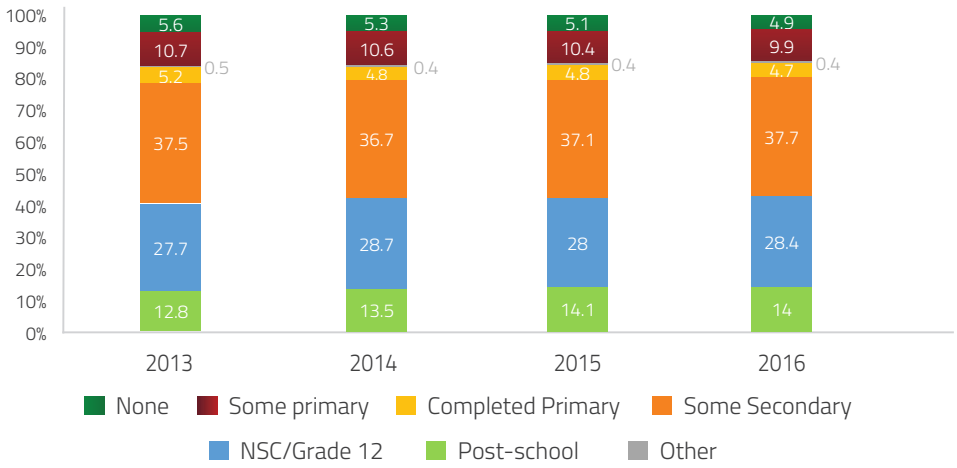
DESCRIPTION: This indicator represents the percentage of 15-year-olds (boys and girls) in the population who are recorded as having obtained a primary school qualification (or Grade 7 at least) and above.

It is noticeable that female learners have a much higher education attainment rate than male learners at the age of 15. In 2015, 90 per cent of female learners achieved Grade 7 and above against 79 per cent of male learners over the same period. The main differentiator, based on the data, is that a higher percentage of female learners have managed to obtain a Grade 9 pass rate at the age of 15 than their male counterparts. The same situation remains in 2016 where the attainment differential is close to 10 per cent. This needs closer examination in future updates.

EDUCATIONAL ATTAINMENT - *INDICATOR 20*

INDICATOR 20:
Percentage distribution of highest level of educational attainment for persons 20 years of age and older, 2014 and 2016

DATA SOURCE:
General Household Survey 2016



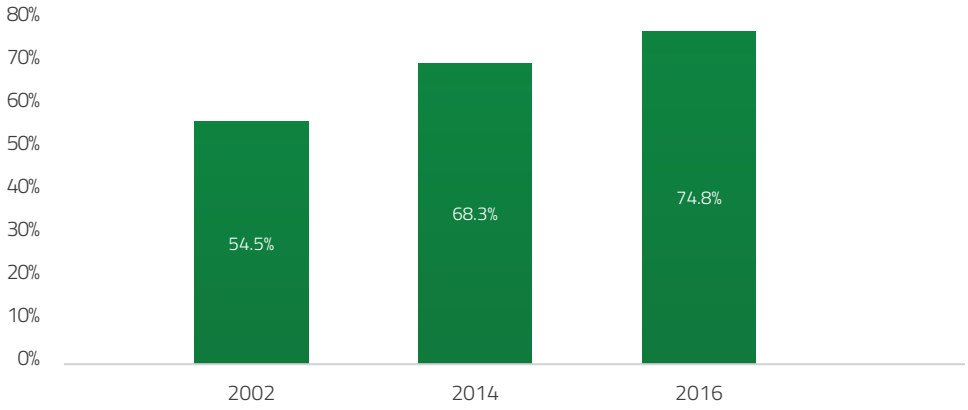
DESCRIPTION: This indicator measures the proportion of individuals in the population who are 20 years and older and records their highest educational attainment (or qualifications).

Primary school attainment among individuals who are 20 and above has remained consistent at around 5 per cent of the adult population. The same observation is applicable to individuals who have some secondary schooling, as the number is consistent at around 37 per cent across the years represented above. The proportions have also remained constant for those in possession of a Grade 12 certificate and it is slightly less than 30 per cent of the population. A much smaller percentage has achieved some post-schooling qualifications, which range between 13 and 14 per cent of the total population.

EDUCATIONAL ATTAINMENT - *INDICATOR 21*

INDICATOR 21:
Percentage of adults aged 20 years and older who have completed Grade 9 and higher, 2013 to 2016

DATA SOURCE:
General Household Surveys 2002, 2014 and 2016



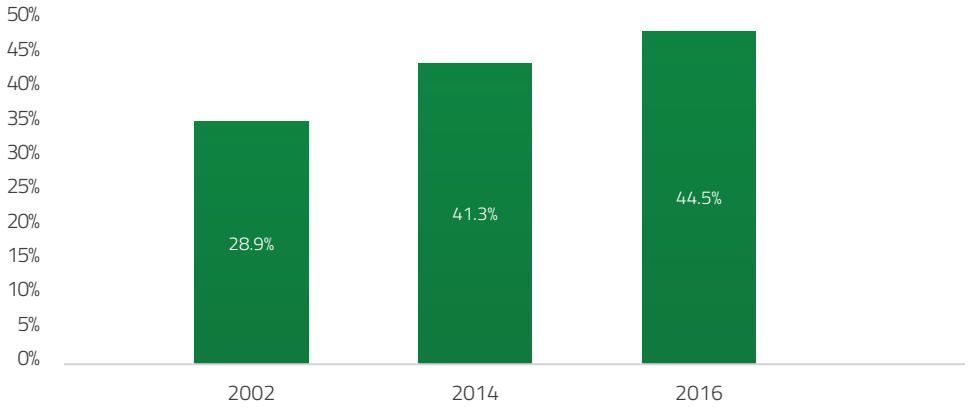
DESCRIPTION: This indicator measures the percentage of adults 20 years and older in the population who have completed Grade 9 and higher academic qualifications.

There has been a steady increase in the percentage of the adult population who are in possession of a Grade 9 academic qualification and higher. In 2002, about 55 per cent of adults had achieved this qualification and this grew to 68 per cent in 2014. By 2016, almost two-thirds of the adult population possessed a Grade 9 and higher academic qualification.

EDUCATIONAL ATTAINMENT - *INDICATOR 22*

INDICATOR 22:
Percentage of adults aged 20 years and older who have completed Grade 12 and higher, 2014 to 2016

DATA SOURCE:
General Household Survey 2016



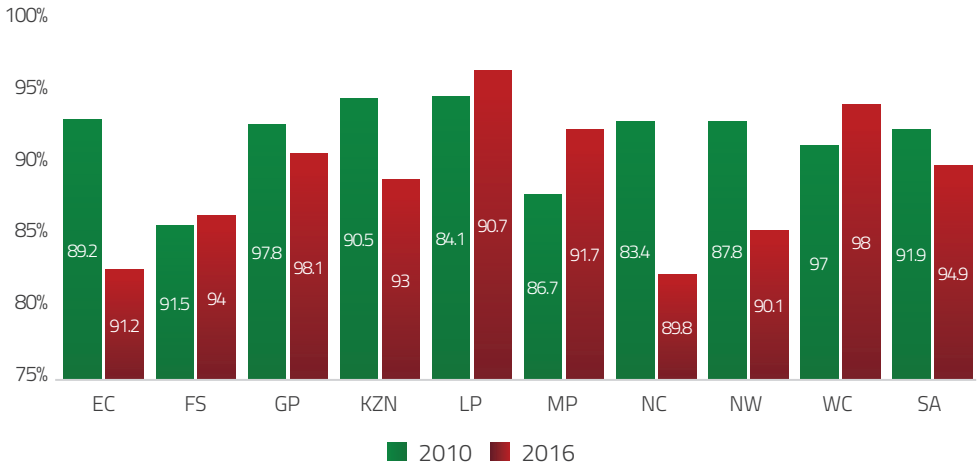
DESCRIPTION: This indicator measures the percentage of adults 20 years and older in the population who have completed Grade 12 and higher academic qualifications.

A rising percentage of adults aged 20 years and above have access to a Grade 12 and higher academic qualification. Between 2002 and 2014, there was a 43 per cent increase in the percentage of adults who came to possess a Grade 12 and higher academic qualification. Between 2014 and 2016, this rise continued, albeit at a much slower rate of 8 per cent.

ADULT BASIC EDUCATION AND TRAINING - *INDICATOR 23*

INDICATOR 23:
Adult literacy rate for persons aged 20 and older by province, 2010 and 2016

DATA SOURCE:
General Household Survey 2016



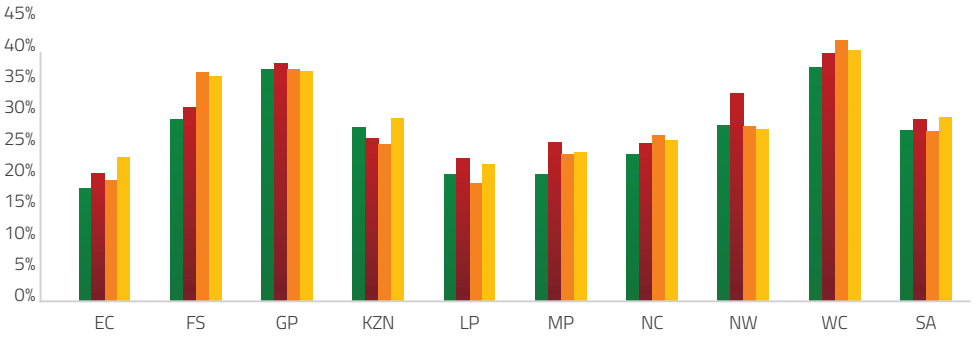
DESCRIPTION: This indicator measures the percentage of adults in the population who are considered literate. Literacy has been operationalised as whether adult respondents have 'no difficulty', 'some difficulty', 'a lot of difficulty' or are 'unable to' read newspapers, magazines and books in at least one language; or write a letter in at least one language.

Between 2010 and 2016, adult literacy rates have increased from 92 per cent to 95 percent. In some provinces, the gains were notable such as the Northern Cape, which moved from an 83 per cent literacy rate in 2010 to almost 90 per cent in 2016. Similar results can be seen for Limpopo, while small but steady increases were observed for most of the remaining provinces. This is a positive development, which bodes well for the government's attempt to improve functional literacy and get adults to formally participate in the education system.

NATIONAL SENIOR CERTIFICATE EXAMINATIONS - *INDICATOR 24*

INDICATOR 24:
National Senior Certificate Examination Bachelor passes as a % of overall passes by province in 2012, 2014, 2016 and 2017

DATA SOURCE:
National Senior Certificate Examinations Report 2017



	EC	FS	GP	KZN	LP	MP	NC	NW	WC	SA
2012	17.6	28.6	36.2	27.3	19.8	19.8	23	27.4	36.5	26.6
2014	20.1	30.2	37	25.6	22.4	24.9	24.7	32.6	38.8	28.3
2016	18.9	35.8	36.2	24.5	18.4	22.9	26	27.5	40.9	26.6
2017	22.7	35.1	36	28.7	21.4	23.4	25.2	26.9	39.1	28.7

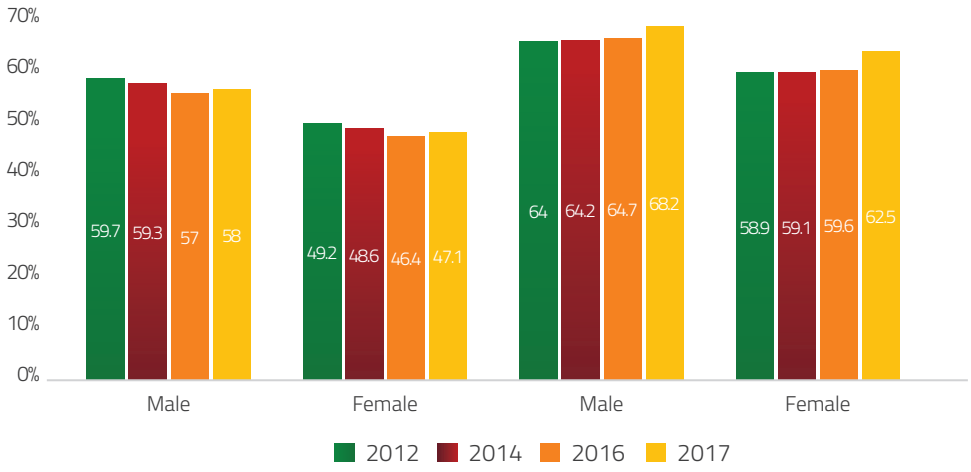
DESCRIPTION: This indicator measures the percentage university-endorsed passes by province. This is an important indicator as Bachelor passes allow students to enter the tertiary education system.

Annually, less than one-third of Grade 12 students qualify to enter the tertiary education system. During the last two academic years, 2016 and 2017, three provinces, namely Free State, Gauteng and the Western Cape, have managed to achieve university-endorsed passes between the 36 and 40 per cent mark for all their candidates. The Eastern Cape, Limpopo and Mpumalanga have achieved the lowest Bachelor passes in 2017 ranging between 21 per cent and 23 per cent respectively.

NATIONAL SENIOR CERTIFICATE EXAMINATIONS - *INDICATOR 25*

INDICATOR 25:
National Senior Certificate Examination performance in Mathematics and Science passes by gender in 2012, 2014, 2016 and 2017

DATA SOURCE:
National Senior Certificate Examinations Report 2017



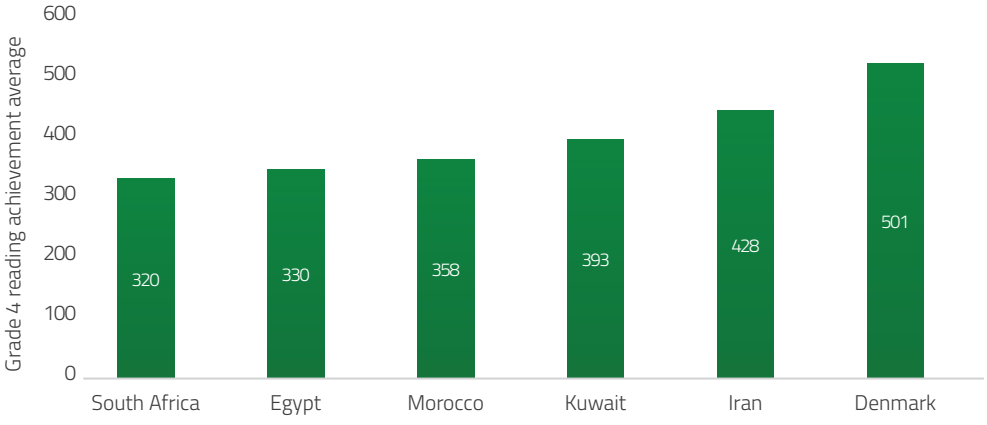
DESCRIPTION: This indicator measures the percentage passes in Mathematics and Science by the gender of the NSC candidate in 2012 to 2017.

Female Grade 12 candidates have performed worse than their male counterparts across the two subjects and consistently across the four years represented above. For Mathematics, both male and female learners have achieved a lower pass rate in 2017 as opposed to the pass rate in 2012. However, the opposite trend is observed for Science passes as the 2017 results are an improvement of the 2012 and 2016 results. Mathematics results are consistent for both genders across the period above and tend to change only slightly, whereas the improvement in Science from 2016 to 2017 is more dramatic for both male and female candidates.

PERFORMANCE IN INTERNATIONAL LEARNER ACHIEVEMENT TESTS - *INDICATOR 26*

INDICATOR 26:
Cross-country comparisons of reading achievement in 2016, Progress in International Reading Study (PIRLS)

DATA SOURCE:
University of Pretoria 2016: https://www.up.ac.za/media/shared/164/ZP_Files/pirls-literacy-2016_grade-4_15-dec-2017_low-quality.zp137684.pdf



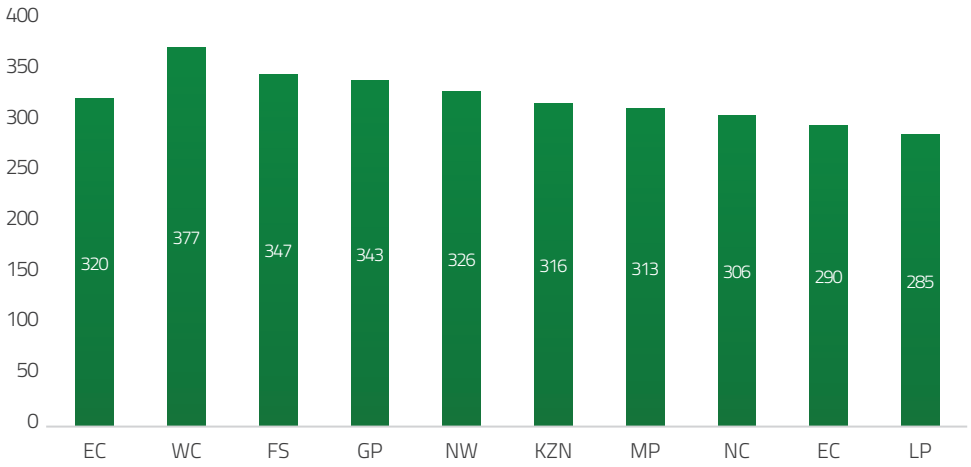
DESCRIPTION: Standardised measure of learners' performance in reading in Grade 4 or its equivalent. Scores represent average standardised scores per country or province. The scale has a mean of 500 and a standard deviation of 100.

South Africa was placed last out of 50 countries that participated in the cross-country survey. Given that the test has an average of 500, South Africa's score of 320 is significantly below the average. The South African results are similar to those achieved by its Egyptian and Moroccan counterparts. The results are worrying and are indicative of the equality challenges in the system. Although not represented in the graph above, the results implied that only 22 per cent of children who participated in the survey could read for meaning, leaving the large majority unable to comprehend texts at their grade level.

PERFORMANCE IN INTERNATIONAL LEARNER ACHIEVEMENT TESTS - *INDICATOR 27*

INDICATOR 27:
Comparisons of reading achievement in Grade 4 on PIRLS by province in 2016

DATA SOURCE:
University of Pretoria 2016: https://www.up.ac.za/media/shared/164/ZP_Files/pirls-literacy-2016_grade-4_15-dec-2017_low-quality.zp137684.pdf



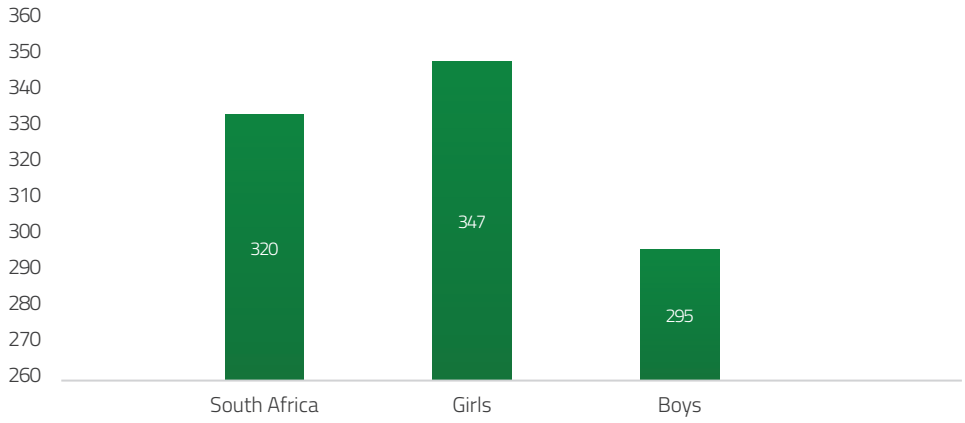
DESCRIPTION: Standardised measure of learners' performance in reading in Grade 4 or its equivalent. Scores represent average standardised scores per country or province. The scale has a mean of 500 and a standard deviation of 100.

What is most noteworthy in the graph above is that although South Africa scored well below the international average for this instrument, there are five out of the nine provinces that scored below the South African national average. This demonstrates the depth of the quality crisis in South Africa and the resultant need for serious interventions. Western Cape scored the highest (377) but still well below the international average, while Free State and Gauteng managed to achieve aggregate scores past the 340 mark.

PERFORMANCE IN INTERNATIONAL LEARNER ACHIEVEMENT TESTS - *INDICATOR 28*

INDICATOR 28:
Comparisons of reading achievement in Grade 4 on PIRLS 2016 by gender in 2016

DATA SOURCE:
University of Pretoria 2016: https://www.up.ac.za/media/shared/164/ZP_Files/pirls-literacy-2016_grade-4_15-dec-2017_low-quality.zp137684.pdf



DESCRIPTION: Standardised measure of learners' performance in reading in Grade 4 or its equivalent. Scores represent average standardised scores per country or province. The scale has a mean of 500 and a standard deviation of 100.

Collectively, girls have managed to achieve at a higher rate than boys (347 vs 295) and as was the case with the provincial scores, it is notable just how far-off boys' average is from the South African national average, which itself was the lowest of all 50 countries. While the results are worrying overall – in particular the reading performance of boys – other similar tests have shown boys and girls are hard to separate in Mathematics, for example. More specific research needs to be done explaining the gender reading differential and its broader impact on the performance of learners generally, and boys, more specifically.

More and more, the growing consensus in the legal fraternity about the meaning and content of the right to basic education is buttressing civil society's efforts to promote the implementation of this right. It is moreover impressive that each of the court cases referred to in Chapter 2 involves references to the financing of education, and what should be assumed to be in place (the adequacy argument). Conversely, dissenting voices may point to the need to fix the quality of education, suggesting that a resources approach to realising the right to basic education is a partial approach, and furthermore that empirical evidence about the importance of resources is not encouraging. However, civil society more generally, and the work of SPII in particular, supports the view that quality education should embrace all aspects, including access, adequate provisioning, and the delivery of quality and relevant basic education.

Since the first SPII Right to Basic Education Report was released in 2014, there have been several worrying developments that demand closer scrutiny. One relates to the sustainability of provinces' public finances in view of the large accumulating spending arrears and pressures that emanate from the compensation budget. The net effect has been a reduction in the financing of key activities and institutions that are dependent on the government, while the implementation of education programmes has suffered. The latest wage increases of public servants will put further pressure on provincial education budgets, which are not projected to grow in any meaningful way over the medium-term. These financing challenges must be viewed in the context of the government's attempt to moderate spending, and the resultant cuts to spending have affected basic education seriously. The evidence we provide in this report suggests that provincial education departments are spending their infrastructure grants effectively, however in recent years some of the largest cuts have been made to infrastructure grants. This means that not even improved spending records might prevent further cuts, thus raising the stakes in terms of what can be achieved with education budgets that will continue to contract over the medium term.

Despite these challenges, some positive developments are identified in the report, including better rates of spending on Early Childhood Development and the special needs education sector. However, such spending is driven by grant funding from the national sphere of government, thus raising concerns about the sustainability of this approach and whether provinces will be able to pick up the spending slack once such national support ceases. A good example that demonstrates the dangers of this approach are spending trends on the Education Infrastructure Grant: provinces have spent less of their own resources; thus, the provision of a national grant can be viewed as crowding-out provincial own contributions and responsibility for school infrastructure. Caution is required in how the national government supports provinces to prevent a situation where fewer resources are available for poor communities because of national interventions.

The 2014 SPII Right to Education Report confirmed the positive developments in terms of learners' access to public schooling but lamented the worrying state of quality education in government schools. These trends have continued unabated in the period between 2014 and 2018 and there are no large-scale quality interventions proposed to remedy the quality deficit. In its stead, the national authorities have invested in pilot studies that focus on reading and reading comprehension, and the scaling-up work has not begun in earnest.[15] Effectively, we are experiencing the same deficit of quality education as in 2014, and that is worrying.

The 2014 report recommended that governance issues relating to stakeholders must be taken seriously and resolved, and that recommendation still stands. Based on this study, we can add both financing and broader policy interventions that are needed to put the basic education sector on a proper footing.

FOOTNOTES:

15. See details of the Early Grade Reading Study here: https://pmg.org.za/committee-meeting/25251/

Firstly, provincial treasuries and education authorities need to formulate a plan to address spending arrears, which will have a material bearing on service delivery in the next few years. The present approach, which often involves withholding legal payments in anticipation of bills that need to be settled in the new financial year, is not sustainable and complicates record-keeping in government. Secondly, given the evidence that provinces know how to spend infrastructure grants, cuts to these grants need to be halted and national indirect grant money could be transferred to provinces for own spending. Thirdly, large-scale quality interventions are unlikely, given the premium on resources in the national budget, but the government should publish results of its quality pilots (on reading, teachers etc.) and begin discussions and consultations with stakeholders about the extension and scaling-up of such work. Fourthly, from a data standpoint, the government needs to prioritise its investment in a proper longitudinal national survey for the basic education sector to track the extent to which it realises children's right to education (adequacy, quality etc.). It also needs to commit to continue publishing information on schools that will help assess the extent to which the right to basic education is being implemented (school financing, violations of learners' rights etc.).

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