

POLICY

BRIEF

FINANCIAL AND FISCAL COMMISSION (2023)

A Review of Learner Transport

EXECUTIVE SUMMARY

The Constitution of the Republic of South Africa defines and provides basic rights for all citizens. Concerning a right to basic education, Chapter 2 of the Constitution recognises access to basic education as a basic right for all. The Constitution further requires that the state, through reasonable measures, should ensure the realisation of this right. There are many input costs for providing basic education, including teachers' and learners' support material, school nutrition, and costs associated with transporting learners from homes to schools and back. Therefore, learner transport is crucial in ensuring that learners arrive at schools safely and on time and provides learners with opportunities to realise and achieve their academic goals.

Some provinces have raised the funding of learner transport as a critical issue that needs an in-depth understanding, particularly in the light of school rationalisation. In other instances, the growing need for learner transport emerges in response to the shortage of school infrastructure that stems from the growth in learner numbers with the result that not all learners can be accommodated in schools closest to them.

Therefore, the main aim of this paper is to understand the demand and supply for learner transport and evaluate and analyse learner transport implications to provinces as a result of schools' rationalisation and changing learner numbers. To achieve this aim, the study undertook an analysis of demand and supply for learner transport, as well as funding and expenditure review for learner transport.

The study utilised a case study approach that involved the Eastern Cape, KwaZulu-Natal and Limpopo that are predominantly rural provinces and with the highest number of rationalized schools. It also included Gauteng that is characterised by an increased number of schools. This case study included interviews with relevant officials from provincial departments of Basic Education and Transport, the National Department of Basic Education and the National Department of Transport.

The study reveals inaccuracy with respect to the demand for learner transport. For instance, the Department of Transport reported a total demand of 503 859 and 521 711 learners in 2015/16 and 2016/17, respectively, while the Department of Basic Education reported demand of 516 886 and 524 662 over the same period. A comprehensive study undertaken in 2018 by the Department of Monitoring and Evaluation, the Department of Basic Education and Department of Transport also confirmed data inaccuracy supplied by the provincial departments and reported by the Department of Basic Education and Department of Transport.



THE FINANCIAL AND FISCAL COMMISSION

The Financial and Fiscal Commission is a body that makes recommendations and gives advice to organs of state on financial and fiscal matters. As an institution created in the Constitution of the Republic of South Africa, it is an independent juristic person subject only to the Constitution itself, the Financial and Fiscal Commission Act, 1997 (Act No. 99 of 1997) (as amended) and relevant legislative prescripts. It may perform its functions on its own initiative or at the request of an organ of state.

The vision of the Commission is to provide influential advice for equitable, efficient and sustainable intergovernmental fiscal relations between national, provincial and local spheres of government. This relates to the equitable division of government revenue among three spheres of government and to the related service delivery of public services to South Africans.

Through focused research, the Commission aims to provide proactive, expert and independent advice on promoting the intergovernmental fiscal relations system using evidence-based policy analysis to ensure the realisation of constitutional values. The Commission reports directly to both Parliament and the provincial legislatures, who hold government institutions to account. Government must respond to the Commission's recommendations and the extent to which they will be implemented at the tabling of the annual national budget in February each year.

The Commission consists of Commissioners appointed by the President: the Chairperson and Deputy Chairperson, three representatives of provinces, two representatives of organised local government and two other persons. The Commission pledges its commitment to the betterment of South Africa and South Africans in the execution of its duties.

It is key to note that accuracy with respect to the actual learner transport demand is essential for the planning and funding/budgeting for learner transport. Hence, the Commission recommends that the national and provincial departments of transport and the national and provincial departments of basic education should consolidate, verify and improve data collection and reporting and ensure that accurate data on learner transport including annual demand is reported and made publicly available through annual reports.

Data collection on learner transport will improve understanding of the demand and growth, planning and budgeting for learner transport and ensure that there are no discrepancies with respect to the demand for learner transport by the national Departments of Transport and Basic Education, as well as these departments at provincial level.

BACKGROUND

The Constitution of the Republic of South Africa defines and provides basic rights for all citizens. Concerning the right to basic education, Chapter 2 of the Constitution recognises access to basic education as a basic right for all. The Constitution further requires that the state, through reasonable measures, should ensure the realisation of this right.

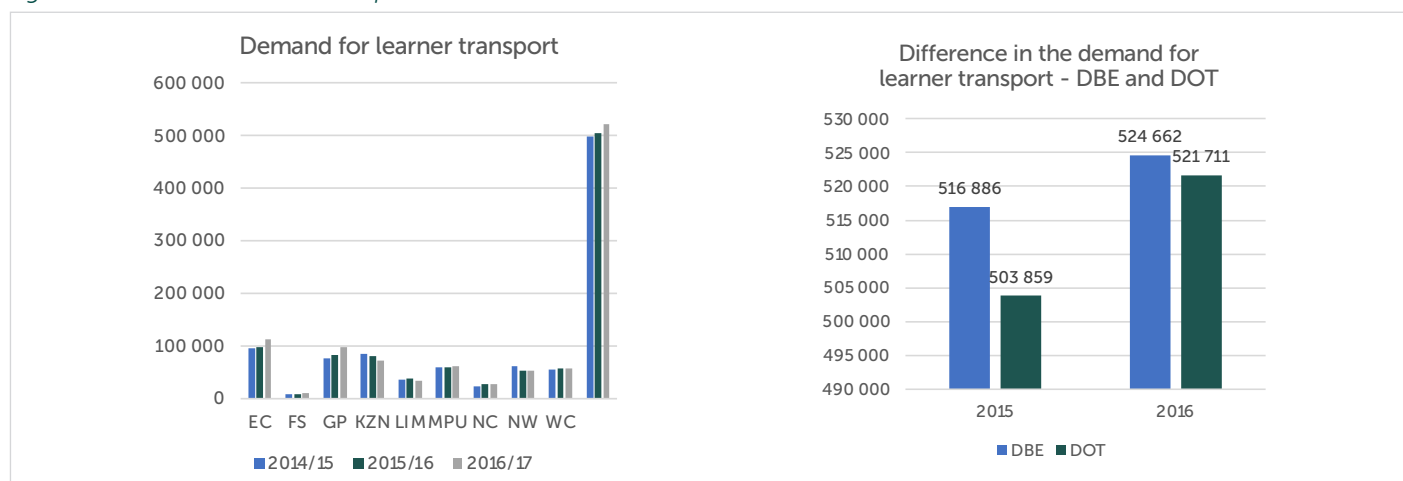
Transporting learners from homes to schools and back is key to attaining the right to access basic education. Therefore, learner transport is crucial in ensuring that learners arrive at schools safely and on time and provides learners with opportunities to realise and achieve their academic goals. Some provinces have raised the funding of learner transport as a critical issue that needs an in-depth understanding, particularly in the light of school rationalisation. In other instances, the growing need for learner transport emerges in response to the shortage of school infrastructure that stems from the growth in learner numbers with the result that not all learners can be accommodated in schools closest to them.

This paper critically analyses demand and supply for learner transport and implications for provinces as a result of schools' rationalisation and changing learner numbers. It also reviews funding and expenditure for learner transport. Through a case study approach and stakeholder engagement, the paper reviewed other challenges experienced in the implementation of the learner transport programmes.

RESEARCH FINDINGS

While the study reveals a general increase in the number of learner transport beneficiaries across all provinces, the demand reported by the Department of Basic Education differs from the demand reported by the Department of Transport. The study details inaccuracy with respect to the demand for learner transport; for instance, the Department of Transport reported a total demand of 503 859 and 521 711 learners in 2015/16 and 2016/17, respectively, while the Department of Basic Education reported demand of 516 886 and 524 662 over the same period as illustrated in Figure 1. It is key to note that accuracy with respect to the actual learner transport demand is essential for the planning and funding/budgeting for learner transport.

Figure 1: Demand for learner transport



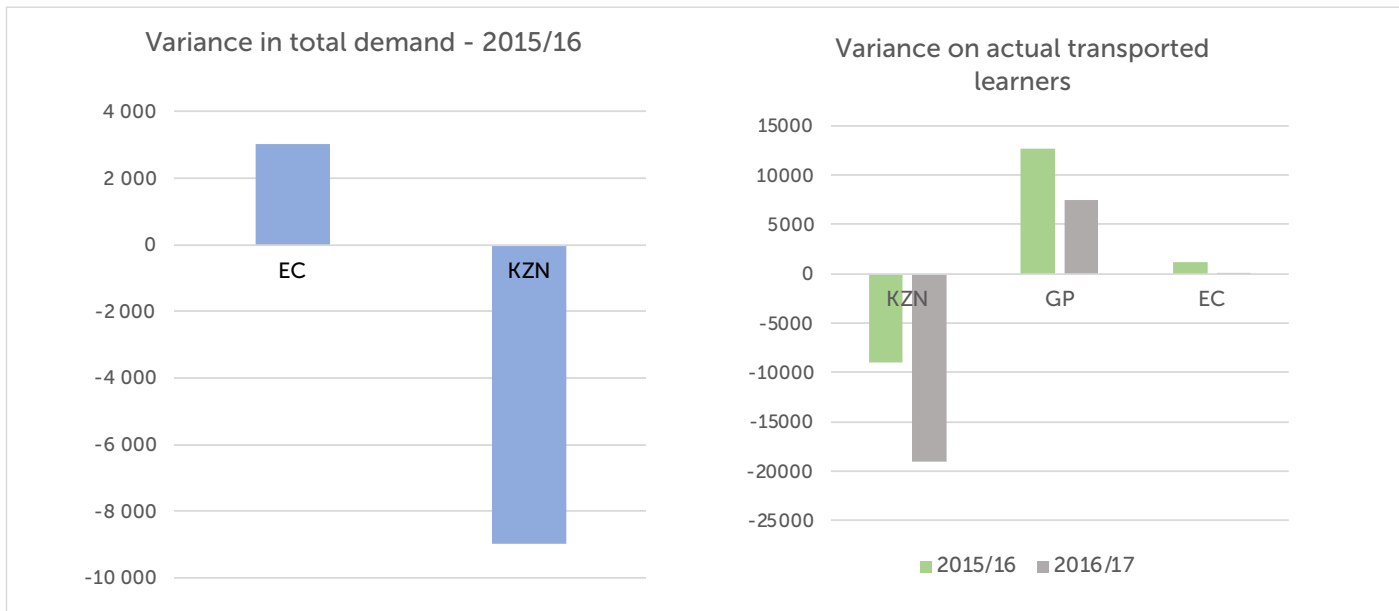
Data Source: National Department of Transport¹ and Department of Basic Education², 2015 and 2016

¹Presentation by the Department of Transport in 2018 to the Standing Committee on Appropriation - Learner Transport: Departments of Basic Education & Transport & Equal Education; with Deputy Minister | PMG

²Department of Basic Education 2015/17 and 2016/17 Annual Report

A comprehensive study undertaken in 2018 by the Department of Monitoring and Evaluation, the Department of Basic Education and Department of Transport also confirmed data inaccuracy supplied by the provincial departments and reported by the Department of Basic Education and Department of Transport. The variance between data from provinces and from the Department of Basic Education and Department of Transport is illustrated in Figure 2.

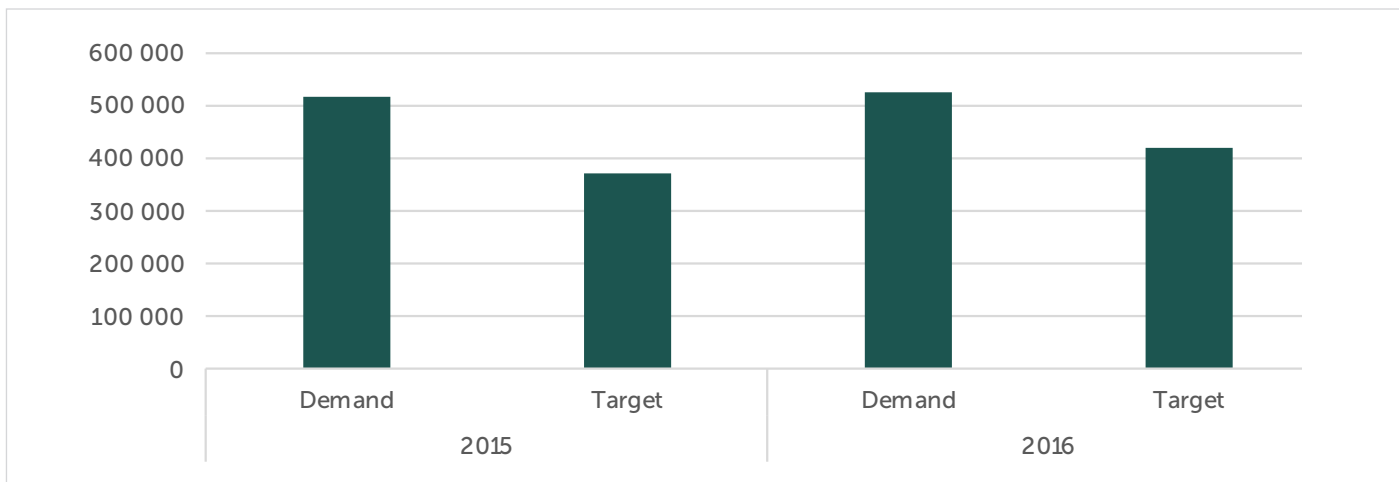
Figure 2: Variance in total demand and transported learners



Data source: Department of Monitoring and Evaluation, Department of Basic Education and Department of Transport, 2018.

Furthermore, it is crucial to note that the number of targeted learner transport beneficiaries always falls below the total number of qualifying learners, as illustrated in Figure 3. For example, during 2015/16, 516 886 learners required and qualified for learner transport, and the total target for that year stood at 371 422 learners (71.9 per cent), implying that about 145 464 qualifying learners had no choice but to walk long distances to and from schools. In 2016/17, of 524 662 qualifying learners, only 420 240 were targeted by provinces. So about 104 422 needy and qualifying learners had to walk long distances to and from schools.

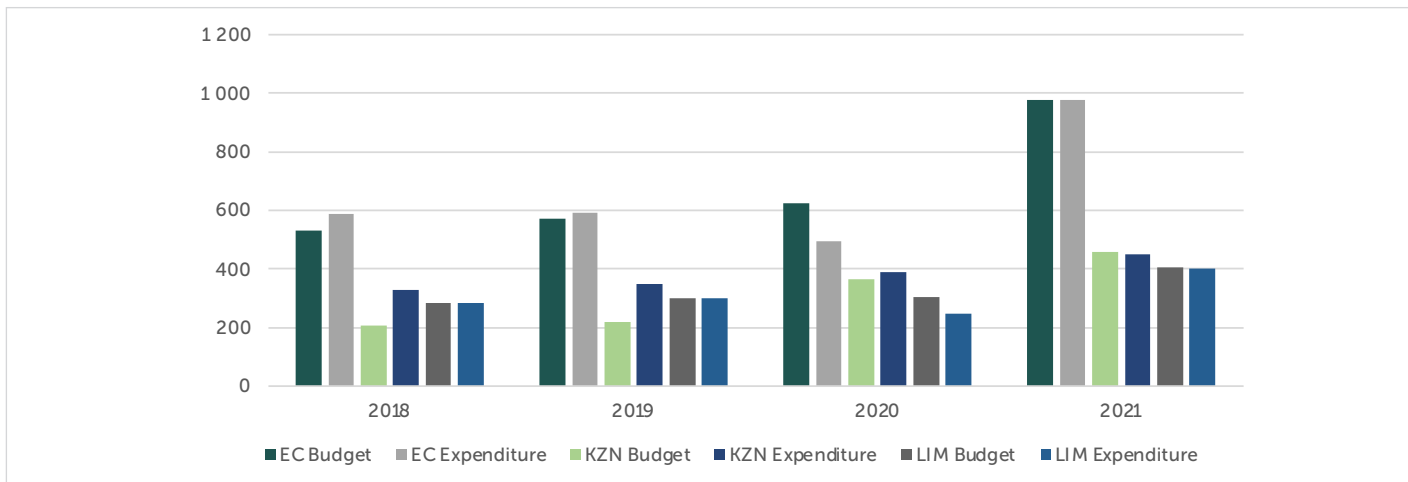
Figure 3: Demand and targeting of learners



Data Sources: Department of Basic Education, Annual Reports, 2015/16 & 2016/17

There are gaps with respect to the budget and expenditure data on learner transport. In some provinces, the budget for learner transport is included with other items under the goods and services classification, and this makes it difficult to determine how much is allocated for the programme. Figure 4 illustrates over-expenditure prior 2020 as funding made available for learner transport has been inadequate. Learner transport expenditure for the Eastern Cape in 2020 and for KwaZulu-Natal in 2021 is attributed to COVID-19 as schooling was seriously disrupted.

Figure 4: Budget and expenditure for the Eastern Cape, KwaZulu-Natal & Limpopo



Data sources: Officials from the provincial departments of Education and Transport, Eastern Cape, KwaZulu-Natal & Limpopo

CONCLUSION

Transporting learners from homes to schools and back is key to attaining the right to access basic education. The study reveals a number of learner transport challenges that can affect the realisation of the basic right to education. These challenges include increasing demand for learner transport as the current demand for learner transport far exceeds the supply.

This is further exacerbated by challenges associated with data discrepancies with respect to the demand and supply for learner transport by the National Department of Transport and provincial departments of education and transport as the actual demand is not fully understood which could affect planning and funding. The study further reveals inability of provinces to provide learner transport to all qualifying learners due to insufficient funding that poses a safety risk as provinces are forced to overload buses and contravene rules and regulation. There is a need to improve systems to ensure accurate reporting of data with respect to the number of learners ferried and that annual changes are captured.

RECOMMENDATIONS

The Commission makes the following recommendations:

1. The national and provincial departments of transport and basic education should improve data collection and reporting and ensure that accurate data on learner transport including the annual demand and expenditure is reported and made publicly available through annual reports.
2. Infrastructure delivery should be planned holistically and coordinated to ensure that where possible the need for learner transport is kept to a minimum, particularly in areas experiencing an inward migration of learners. This requires coordination between the various infrastructure delivery plans such as human settlements and school infrastructure. Furthermore, provincial treasuries and provincial education departments must ensure that school infrastructure delivery plans for building new schools in provinces prioritise areas with sustained higher demand for learner transport or with higher learner transport beneficiaries.
3. The national and provincial treasuries, in consultation with provincial departments of transport and basic education, should develop a new funding model for learner transport. Such a model must also include flexibilities for provinces to address emergency contracts to provide learner transport.
4. The provincial departments responsible for learner transport should develop systems to verify the number of learners transported through the learner transport programme annually to ensure that annual changes are captured and accounted for (learners pass primary and move to secondary schools, learners pass matric while some drop out).

ENQUIRIES:

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