

ANNEXURE C

Budgeting for Realising the Right to Basic Education for Children with Disabilities in South Africa, Debbie Budlender

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Executive summary

This report expands on earlier budget analysis commissioned by Section27 relating to fulfilment of the right to education of children with disabilities. In addition to analysing the provincial and national budget votes, the report explores available statistics on prevalence of disability and impact on access to schooling, relevant policies and related documents, and performance indicators.

Prevalence of disability

Analysis of data from the national Census 2001 suggests that 465,000 children had special educational needs in 2011, amounting to 4,2% of the total population 6-17 years. Rates of disability are similar for girls and boys, but in terms of race, African children account for 89% of our estimate of children with special needs.

The rate of reported disability is noticeably higher in Northern Cape than in other provinces, at 7,5% for our proxy for special needs. This could indicate the impact of foetal alcohol syndrome. However, in absolute terms Gauteng has more children aged 6-17 years with special needs than Northern Cape. KwaZulu-Natal alone accounts for more than a fifth (21%) of children with special needs.

If one compares the distribution of children with disabilities with each province's share of total combined provincial budgets for special schooling, Gauteng and Western Cape have disproportionately large shares of available funds. In contrast, Northern Cape accounts for only 1% of the combined budget but 4% of the children, while Limpopo accounts for 7% of the combined budget but 15% of total children with special needs.

The patterns of school attendance for children with "some difficulty" are very similar to those for children with no difficulties. However, attendance drops – from 93% to 91% and then 83% – as the degree of disability increases.

Policy

The heads of argument for a court challenge by the Western Cape Forum for Intellectual Disability (Case no 18687/07) of government's failure to provide adequately for the education of children with severe and profound intellectual disabilities explains how this failure undermines the rights to a basic education, to equality, to human dignity, and to be protected from neglect and degradation. Similar arguments would apply to children with other types of disability who are denied an appropriate education. The heads of argument for the court challenge also cite clauses of a range of international instruments which confirm the right to education of children with disabilities. This right is also confirmed in Clause 5 of the National Education Policy Act of 1996.

White Paper 6 on Inclusive Education of 2001 provides the overall framework in respect of education for persons with disability. The White Paper envisages a dual strategy in which special schools will be strengthened so as to provide improved services for learners with severe disabilities, while "ordinary" educational institutions are adapted so as to provide adequately for learners with moderate and mild disabilities. The White Paper envisages, in particular, the conversion of some ordinary schools and colleges into "full-service" institutions. In addition, it envisages special schools becoming resources for all other schools through improved district support services.

The paper includes a time-bound roll-out plan as well as a "revised funding strategy" to provide the resources for implementation. The chapter on the funding strategy recognises the unlikelihood of substantial additional public funds being allocated for inclusive education in the near future. However, it also recognises that some additional funding is needed for special needs education, including from provincial education budgets as well as local and international donors. The strategy of limiting the number of special schools while establishing full-service schools is in part motivated on economic grounds, namely that substantial expansion of special school provision is unaffordable.

The White Paper proposes that a new conditional grant be established in the first five years. Fourteen years later, there has been no such grant established. The fourteen years have, however, seen production of a range of guidelines that are relevant for implementation of inclusive education.

The provincial budgets:

The provincial education budgets include a dedicated programme for Special Public Schools Education which seems to cover most of the costs associated with inclusive education. Indeed, coverage extends beyond education for children with disabilities to areas such as education in certain types of child and youth care centres and home schooling.

For 2014/15, the nine provinces combined allocated R5.7 billion to this programme. At first glance all provinces

seem to show a steady increase in allocations over time. This seemingly positive picture has several caveats. Firstly, the expenditure and allocations shown above are in nominal terms, uncorrected for inflation. If the allocations for the medium-term expenditure framework (MTEF) period of 2014/15-2016/17 are corrected for inflation, over all provinces combined there is no change in the allocation over the three years of the MTEF, despite a new conditional grant (for backpay of the occupation-specific dispensation for therapists) in two of the years. For the previous period from 2010/11-2013/14 the picture is more positive, with a 4% average real increase per year, and positive increases in all provinces except Northern Cape.

If one calculates the percentage that the public special schools programme constitutes of the total Education vote for the province concerned, for all provinces combined the table suggests a very slightly increasing trend over the period. However, even at the end of the period the programme accounts for only 3% of the total budget. The percentages shown for the nine provinces combined is more or less identical to the 2.8% of the total education budget allocated to special schools reported in White Paper 6 of 2001. The overall picture is thus one of little, if any, improvement since 2001.

The budget sub-programmes

Provinces have two to four sub-programmes within the public special school education programme. The Schools sub-programme is by far the largest, accounting for 98% or more of each province's programme budget throughout the period.

Examination of the economic classification (i.e. broad line items) reveals that two items – compensation of employees and transfers to non-profit institutions (NPIs) account for the overwhelming bulk of the Special School Education expenditure. Compensation of employees covers expenditure on salaries and related costs. It includes such payments for departmental officials as well as any educators/teachers and other staff funded by the department in the public schools. Unfortunately, the budget documents do not distinguish between allocations for educators and other staff. They also do not disaggregate the number of staff employed by programme. This limits the analysis that can be done. For the country as a whole, compensation of employees accounts for 80% or more of the programme in all years except 2010/11.

Transfers to NPIs consists primarily of payments made to schools to cover non-personnel costs. Where a school governing body has successfully applied for section 21 status in terms of the South African Schools Act of 1996, funds for learner teacher support materials (LTSM) such as textbooks and stationery, equipment, utilities, general

building maintenance and, in some cases even school nutrition, are transferred to the school's bank account. In these cases the funds are included under transfers to NPIs and it is not possible to identify the division between the different types of expenditure.

The share of the budget allocated for transfers to NPIs ranges from 10% (in Northern Cape) to 21% (in North West) for 2014/15. Overall, 15% of the special schools education budget goes on transfers to NPIs, with the percentage more or less constant over the period 2010/11 to 2016/17.

The fact that the budget documents do not show expenditure on LTSM for Section 21 schools separately does not explain the erratic patterns to allocations to the LTSM line item for other schools. Mpumalanga is the only province which consistently allocates more than R1 million to LTSM over the seven years shown in the budget vote.

It is not clear where, if at all, the public special school education budgets make provision for learner transport. In the period 2010/11 to 2013/14 several of the provinces record amounts, often erratic, for an item named "Transport provided: Departmental activity". None of the provinces have amounts recorded for this item from 2014/15 onwards. Unfortunately, the budget votes also do not disaggregate training expenditure or number of trainees by budget programme.

In addition to the Special School Education programme, provinces' Infrastructure budget programme with the Education votes include a sub-programme relating to infrastructure for special schools. All provinces except Limpopo allocate funds for this sub-programme, although the allocations in Northern Cape are erratic. For the most part, the funds are sourced from the Education Infrastructure Grant, which is a conditional grant from the national Department of Basic Education (DBE).

The national budget

The budget vote of the national Department of Basic Education for 2014 makes little reference to special schools and/or inclusive education. There are also no key performance indicators relating to special or inclusive education. Programme 2, Curriculum Policy, Support and Monitoring, includes funding for the inclusive education directorate, and is therefore the place where one would expect to find provision for schooling for persons with disabilities. The allocation is, however, not sufficiently disaggregated in 2014 to be able to identify how much is allocated for inclusive education.

Performance indicators

The White Paper of 2001 shows the relative advantage of Gauteng and Western Cape in terms of number and

percentage of learners accommodated, as well as the number of special schools. Limpopo is the worst off in terms of the percentage of learners in special schools. In terms of expenditure per learner, Western Cape is best off, and North West and Eastern Cape worst off.

A similar provincial breakdown for special schools in 2012 shows North West having fewer special schools than in 2001, while Western Cape shows no increase at all. Overall, inequity in provision across provinces may have increased over the ten-plus years. Unfortunately the available information does not answer the question as to whether provinces have reached the objective of White Paper 6 of having at least one special school and one full-service school in each district.

The number of learners in public special schools stood at 111,598 in 2012, while the number of special schools stood at 444. This suggests a 9% increase in the number of schools together with a 58% increase in the number of learners over the period 2001 to 2007, followed by lower increases of 6% and 9% respectively between 2007 and 2012. In terms of funding, for 2013/14, the amount allocated per learner

ranges from R39,797 in Limpopo to R86,025 in Eastern Cape. Eastern Cape's expenditure per learner is thus more than double that of Limpopo, and also more than double that of Gauteng.

In addition to those in special schools, 25,213 children with special needs were enrolled in 791 full-service schools in 2014. Free State accounts for 32% of all special needs enrolment in full-service schools, despite being one of the smaller provinces population-wise.

In conclusion

The analysis suggests that while the number of special and full-service schools, and the number of learners serviced, have increased over the years, this has not happened to the extent planned. Further, the rate of increase has slowed down over recent years. Further, the budget votes provide very limited information on what is being done with the funds allocated. The level of disaggregation and categories used in the budget votes also make it difficult, if not impossible, to identify the amounts spent on important areas such as LTSM, transport and training.

Introduction

This report complements other work done by Section27 in supporting individual children with disabilities and their families to access education for the children, and in undertaking research and advocacy more generally to promote fulfilment of the right to education for children with disabilities. The report expands on an earlier budget analysis undertaken by Penny Parenzee which focused, in particular, on KwaZulu-Natal and one of its special schools. This report expands on the earlier research by exploring available statistics on prevalence of disability and impact on access to schooling, relevant policies, and the narrative and performance indicators recorded in the budget books. The timing of this report seems appropriate as 2013 was declared the Year of Inclusive Education, and it is therefore now a good time to look back to see what was achieved.

The report is based on desk-based research. The main source documents were the nine provincial budget votes for 2014. The budget analysis thus covers the period 2010/11 through 2016/17, which is the period for which estimates are shown in the 2014 budget votes. In addition to these budget documents, the report draws on a range of policy and guideline documents, and some data provided by

National Treasury.

The concluding section and other sections of the report highlights the challenges encountered in undertaking the research, and the most important resulting gaps in our knowledge as to the extent to which the Government of South Africa is meeting its obligations in respect of education for children with disabilities.

Prevalence of disability

The draft national disability rights policy issued by the Government of South Africa in early 2015 notes that the 2006 Convention on the Rights of Persons with Disability does not try to define disability “but rather recognises disability as an evolving concept which results from the interaction between persons with impairments and attitudinal and environmental barriers.” The differentiation between “disability” and “impairment” is mirrored in many of the South African documents that discuss inclusive education. These documents emphasise that disability should be seen as being (in large part) the result of an unaccommodating environment rather than a deficiency on the part of the individual. The draft policy explains the preferred terminology as follows:

Disability is imposed by society when a person with a long-term physical, psychosocial, cognitive neurological and/or sensory impairment is denied access to full participation in all aspects of life, and when society fails to uphold the rights and specific needs of individuals with impairments.

Persons with disabilities are therefore persons who – as a result of a temporary or permanent impairment – are unable to either gain access to equal opportunities to all aspects of life enjoyed by any other person, or when obstacles are placed to the achievement of such equal opportunities.

Statistics South Africa asks a series of questions to establish disability (or impairment) in exercises such as Census 2011 and the General Household Survey (GHS). The agency uses an international approach known as the Washington Group approach which focuses on activity limitations. The draft national disability rights policy favours this particular approach although it arguably measures impairment rather than disability. The series of questions, asked in respect of each household member aged five years and older, reads as follows:

Does [name] have difficulty in doing any of the following?

- A = Seeing even when using eye glasses
- B = Hearing even when using a hearing aid
- C = Communicating in his/her language (understanding others or being understood by others)
- D = Walking or climbing stairs
- E = Remembering or concentrating
- F = Self-care such as washing all over, dressing or feeding

For each of A-F one of the following options must be chosen:

- 1 = No difficulty
- 2 = Some difficulty
- 3 = A lot of difficulty
- 4 = Unable to do
- 5 = Do not know

One weakness of the Washington Group approach is that it does not capture individuals with psychosocial, neurological

or emotional disabilities. The questions also do not give a fully accurate picture of which children will have special needs in education. They are, however, the best indicators currently available.

The statistics provided in the following tables relate to the age group 6-17 years, i.e. children of schoolgoing age. The age group extends a little beyond the compulsory age for schooling. This seems appropriate given that children with disabilities are, on average, more likely than other children to need longer to attain any given level of schooling. Further, if people are to develop to their full capabilities, they need to go beyond compulsory education, whether or not they have disabilities. The tables can be used as a rough indication of need. In reality, they under-estimate need as most young people will not have completed their schooling by the time they reach their 18th birthday.

To simplify matters, in this report a child is given a disability rating based on the highest level reported for any of the items A-F. Thus, for example, a child will be rated as having a lot of difficulty if this is recorded for walking or climbing stairs, while no difficulty or lesser difficulty is recorded for all other items. The counts for the children in the categories “lot of difficulty” or “can’t do” can probably serve as a proxy for the number of children who are likely to have “special needs” in respect of education, while those for whom “some difficulty” is reported might have some special needs but can probably be accommodated in ordinary public schools, whether full-service or otherwise. (Full-service schools are discussed in more detail in the policy discussion that follows.)

Using this rough approximation, Table 1 suggests that more than 465,000 children had special educational needs in 2011, amounting to 4,2% of the total population 6-17 years. The rate of reported disability is noticeably higher in

Northern Cape than in other provinces, at 7,5% for our proxy for special needs. This could indicate the impact of foetal alcohol syndrome. Serious disability is also higher than usual in North West and Free State, while it is lowest in Gauteng.

Table 1: Disability among children 6-17 years by province, 2011

PROVINCE	NONE	SOME DIFFICULTY	LOT OF DIFFICULTY	CAN'T DO	TOTAL %	TOTAL NUMBER
EC	88%	7.9%	2.2%	1.6%	100%	1,695,533
FS	82%	11.9%	4.0%	2.3%	100%	600,303
GT	90%	7.2%	1.7%	1.2%	100%	2,028,458
KZ	88%	7.9%	2.3%	1.5%	100%	2,534,278
LM	86%	8.5%	2.9%	2.2%	100%	1,404,616
MP	88%	8.3%	2.5%	1.4%	100%	966,994
NC	83%	9.6%	3.4%	4.1%	100%	265,833
NW	83%	10.5%	3.5%	2.8%	100%	752,114
WC	92%	5.1%	1.3%	1.7%	100%	1,074,379
RSA	88%	8.1%	2.4%	1.8%	100%	11,322,508
	9,944,857	912,130	266,393	199,127		

Source: Own calculations, Census 2011 10% sample

A focus only on prevalence is inadequate for planning purposes as Northern Cape is the least populous province while Gauteng is the most populous. Table 2 shows that in absolute terms Gauteng has more children aged 6-17 years with special needs than Northern Cape. KwaZulu-Natal alone accounts for more than a fifth (21%) of children with special needs using this proxy measure.

The final column of Table 2 compares the distribution of special needs across provinces with the distribution of funding for special needs education. (Provincial budgets are discussed in more detail in a later section of the report.) The distribution is obtained by dividing the total combined provincial allocations for the public special schools budget programme by the allocation for a specific province. The table shows Gauteng accounting for nearly a third (32%) of the total, while Western Cape also accounts for a disproportionate share of the budget. In contrast, Northern Cape accounts for only 1% of the combined budget but 4% of the children, while Limpopo accounts for 7% of the combined budget but 15% of total children with special needs.

Table 2: Number and distribution of special needs children 6-17 years and special schools budget by province, 2011

PROVINCES	SPECIAL NEEDS	% OF TOTAL CHILDREN	% OF TOTAL BUDGET
EC	63,902	14%	10%
FS	37,990	8%	7%
GT	58,926	13%	32%
KZ	95,669	21%	15%
LM	71,518	15%	7%
MP	37,443	8%	4%
NC	19,840	4%	1%
NW	47,120	10%	6%
WC	33,113	7%	18%
TOTAL	465,521	100%	100%

Source: Own calculations, Census 2011 10% sample

Table 3 shows the distribution of disability by age of the child. The prevalence is higher at younger than older ages. This might well, at least in part, simply reflect the fact that young children may not yet be fully competent in areas such as self-care and communication. It is also possible that more severely disabled children die earlier, or are placed in institutions. The latter

children would not be covered in the Census household data used for these tables or in the GHS. The census and household surveys also exclude persons in school boarding facilities. In that sense, these tabulations are undercounts. However, with the younger ages we might well have some degree of overcount because of ongoing development of capabilities.

Table 3: Disability among children 6-17 years by age, 2011

AGE	NONE	SOME DIFFICULTY	LOT OF DIFFICULTY	CAN'T DO	TOTAL %	TOTAL SPECIAL NEEDS
6	76%	12.9%	5.7%	5.2%	100%	112,574
7	80%	11.7%	4.3%	3.6%	100%	75,021
8	83%	10.7%	3.5%	2.7%	100%	56,039
9	85%	9.7%	2.7%	2.2%	100%	42,765
10	88%	8.2%	2.2%	1.8%	100%	36,880
11	89%	7.4%	1.9%	1.3%	100%	29,602
12	91%	6.8%	1.6%	0.9%	100%	22,526
13	91%	6.4%	1.5%	0.8%	100%	20,189
14	92%	6.0%	1.3%	0.7%	100%	18,322
15	92%	5.8%	1.2%	0.7%	100%	18,750
16	93%	5.5%	1.1%	0.6%	100%	16,485
17	93%	5.5%	1.1%	0.5%	100%	16,367
TOTAL	88%	8.1%	2.4%	1.8%	100%	465,521

Source: Own calculations, Census 2011 10% sample

The Census shows virtually no gender difference in terms of disability. For both inability to do at least one of the activities and substantial difficulty in doing at least one activity, the prevalence for boys is 0.1 percentage points higher than for girls. This might partly reflect slower development of boys than girls, but the difference is very small and unlikely to be statistically significant.

Table 4 shows a clear difference in disability rates by

population group. Severe disability is most common in the coloured group, again perhaps reflecting foetal alcohol syndrome. However, for "lot of difficulty" and "can't do" combined, the prevalence is highest for African children, at 4.4%. Because African children account for the majority of all children, they account for 89% of our estimate of children with special needs.

Table 4: Disability among children 6-15 years by population group, 2011

RACE	NONE	SOME DIFFICULTY	LOT OF DIFFICULTY	CAN'T DO	TOTAL	TOTAL SPECIAL NEEDS
African	87%	8.6%	2.6%	1.8%	100%	412,885
Coloured	91%	5.3%	1.5%	2.2%	100%	37,387
Indian	92%	6.2%	1.2%	0.8%	100%	4,109
White	94%	4.5%	1.0%	0.7%	100%	10,033
Other	91%	6.3%	1.6%	1.6%	100%	1,106
TOTAL	88%	8.1%	2.4%	1.8%	100%	465,521

Source: Own calculations, Census 2011 10% sample

Figure 1 shows attendance at an educational institution (school) for children aged 6-17 years by degree of disability. The patterns for children with “some difficulty” are very similar to those for children with no difficulties. However, attendance drops – from 93% to 91% and then 83% - as the

degree of disability increases. The percentage unspecified also increases for those with severe disability, perhaps because those asking and answering the questions feel the question about education is inappropriate.

Figure 1: School attendance for children 6-17 years by degree of disability, 2011

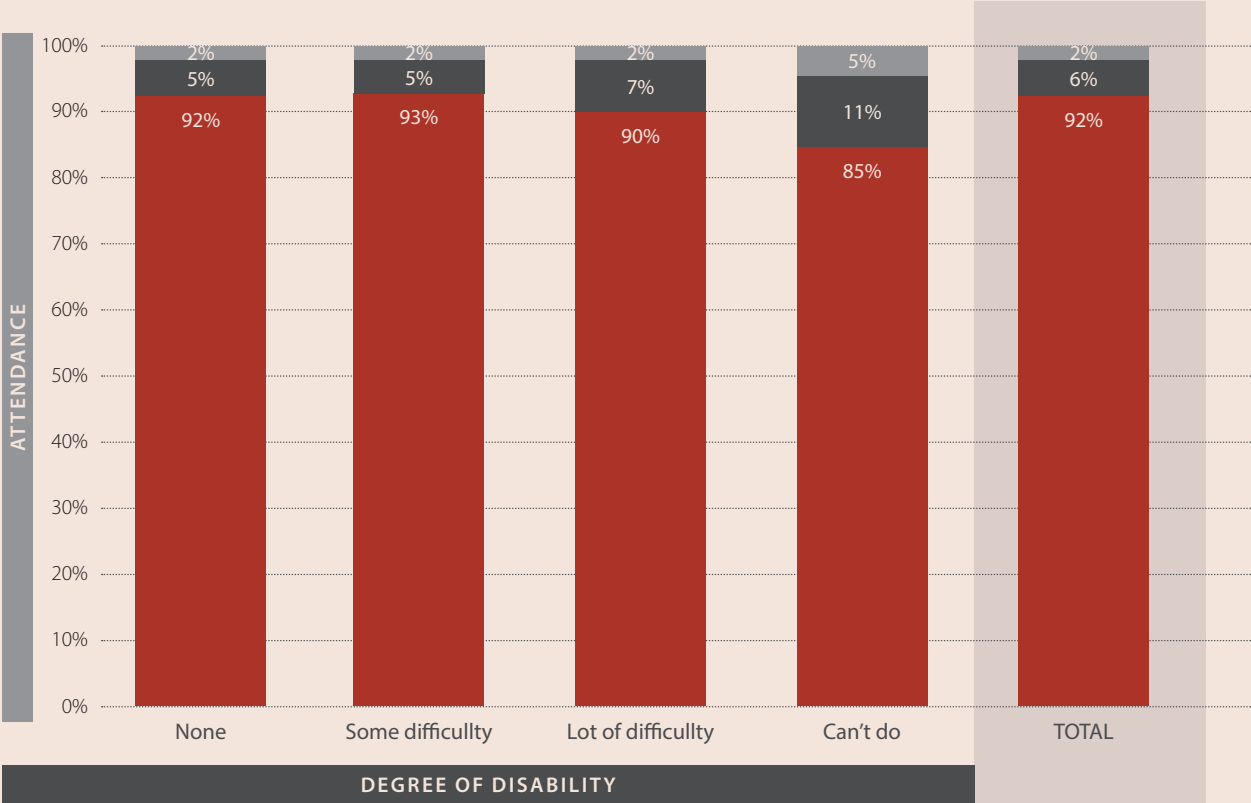


Table 5 shows school attendance by both degree and type of disability. For each of the activities, attendance decreases as the degree of disability increases. Attendance rates are lowest for those who have difficulty walking, followed by

those with difficulty in communication. Attendance rates are highest for those with difficulty seeing and in self-care. Attendance among those with no sight is almost as high as those who experience only “some” difficulty in walking.

School attendance by degree of difficulty in different activities, 2011

ACTIVITY	SOME DIFFICULTY	LOT OF DIFFICULTY	CAN'T DO
Seeing	93%	91%	83%
Hearing	91%	88%	78%
Communication	86%	77%	63%
Walking	84%	72%	58%
Remembering	90%	83%	69%
Self-care	93%	91%	85%

Source: Own calculations, Census 2011 10% sample

Table 5 is a simplification of reality in that some children may have difficulties with more than one type of activity. School attendance drops from 91% among those with only one area of activity in which they have a lot of difficult or complete inability, to 42% among those with four areas of difficulty and 41% among those with five areas of difficulty. However, the relatively small number of children with all areas marked as difficult show an anomalous average 65% attendance rate.

The GHS of 2013 produces patterns of disability for children that are very similar to those obtained from Census 2011. The GHS is useful for our purposes because it has an additional question that asks, for those not attending educational institutions, the main reason for non-attendance. Analysis of this question reveals 22% of those

reporting some difficulty in at least one area of activity, 11% of those with a lot of difficulty, and 67% of those with inability in at least one area giving disability as the reason for non-attendance. This must be compared with 2% who report no difficulties in any area who give disability as the reason for non-attendance. Those who report some level of difficulty in at least one area are also far more likely (18-22% of each disability category among the non-attendance) than those with no difficulty (3% of the category) to report illness as the main reason for non-attendance. Those with some difficulty (22%) or a lot of difficulty (43%) in at least one area are also more likely to have their age (too old or young) as the reason given for not attending education. This could be because a later starting age is seen as appropriate for some children with difficulties.

Policy

Basic rights

The heads of argument for a court challenge by the Western Cape Forum for Intellectual Disability (Case no 18687/07) of government's failure to provide adequately for the education of children with severe and profound intellectual disabilities (i.e. with IQ levels of 35 or less) explains how this failure undermines the rights to a basic education, to equality, to human dignity, and to be protected from neglect and degradation. Similar arguments would apply to children with other types of disability who are denied an appropriate education.

The heads of argument note that the South African Constitution presumes that discrimination on the basis of disability is unfair unless it is proved that this is not the case. The document notes further that a child with disability has greater need than the average child, and the (financial and other) provision for such children should thus be greater than average if equity is to prevail. It explains that the Constitutional rights in respect of basic education (in section 29) and to equality (in section 9) differ from many other socio-economic rights in that they are not qualified in terms of availability of resources. These rights are immediately, rather than progressively realisable.

The Promotion of Equality and Prevention of Unfair Discrimination Act (No. 4 of 2000) elaborates on section 9, the equality clause, of the Constitution. It defines discrimination as "any act or omission, including a policy, law, practice, condition or situation which directly or indirectly imposes burdens, obligations or disadvantage on; or withholds benefits, opportunities or advantages from, any person on one or more of the prohibited grounds" (emphasis added). This seems relevant for our purposes as

budgets are laws, and they confer benefits, opportunities and advantages.

The heads of argument for the court challenge also cite a range of international instruments to which the South African government has made itself party and which confirm the rights of children with disabilities to education.

Article 23 of the United Nations Convention on the Rights of the Child states that "a mentally or physically disabled child should enjoy a full and decent life, in conditions which ensure dignity, promote self-reliance and facilitate the child's active participation in the community." Of particular importance for our purposes, Article 28 confirms the right to education, while Article 29(1)(a) states that "the education of the child shall be directed to... [t]he development of the child's personality, talents and mental and physical abilities to their fullest potential".

Article 11(1) of the African Charter on the Rights and Welfare of the Child states that "[e]very child shall have the right to an education" while Article 11(2)(a) states that the "[t]he education of the child shall be directed to... the promotion and development of the child's personality, talents and mental and physical abilities to their fullest potential..." Article 13 elaborates further on the rights of a child with disabilities, including rights in respect of "effective access to training, preparation for employment and recreation opportunities".

The Convention on the Rights of Persons with Disabilities and its Optional Protocol were ratified by South Africa on 30 November 2007. Article 24(2) states that:

...States Parties shall ensure that:

(a) Persons with disabilities are not excluded from the

general education system on the basis of disability, and that children with disabilities are not excluded from free and compulsory primary education, or from secondary education, on the basis of disability;

(b) Persons with disabilities can access an inclusive, quality and free primary education and secondary education on an equal basis with others in the communities in which they live;

(c) Reasonable accommodation of the individual's requirements is provided;

(d) Persons with disabilities receive the support required, within the general education system, to facilitate their effective education;

(e) Effective individualized support measures are provided in environments that maximize academic and social development, consistent with the goal of full inclusion.

The above policies leave no doubt that children with disabilities are entitled to education.

National Education Policy Act

The preamble to the National Education Policy Act (No. 27 of 1996) confirms the need to transform the national education system "into one which serves the needs and interests of all the people of South Africa and upholds their fundamental rights". Such rights, as seen above, include the right to basic education. As noted above, the Constitutional provisions in respect of equality and non-discrimination confirm that these rights extend to people with disabilities or "special needs". Clause 5 of the National Education Policy Act indeed confirms that it is concerned with:

(a) the advancement and protection of the fundamental rights of every person guaranteed in terms of Chapter 3 of the Constitution, and in terms of international conventions ratified by parliament, and in particular the right-

(i) of every person to be protected against unfair discrimination within or by an education department or education institution on any ground whatsoever;

(ii) of every person to basic education and equal access to education institutions;

(iii) of a parent or guardian in respect of the education of his or her child or ward;

(iv) of every child in respect of his or her education;...

(b) enabling the education system to contribute to the full personal development of each student, and to the moral, social, cultural, political and economic development of the nation at large, including the advancement of democracy, human rights and the peaceful resolution of disputes;

(c) achieving equitable education opportunities and the redress of past inequality in education provision, including the promotion of gender equality and the advancement of the status of women;

(d) endeavouring to ensure that no person is denied the opportunity to receive an education to the maximum of his or her ability as a result of physical disability;

(e) providing opportunities for and encouraging lifelong learning;

(h) recognising the aptitudes, abilities, interests, prior knowledge and experience of students;...

White Paper 6 on Inclusive Education

White Paper 6 on Inclusive Education of 2001 provides the overall framework in respect of education for persons with disability. The White Paper envisages a dual strategy in which special schools will be strengthened so as to provide improved services for learners with severe disabilities, while "ordinary" educational institutions are adapted so as to provide adequately for learners with moderate and mild disabilities. The White Paper envisages, in particular, the conversion of some ordinary schools and colleges into "full-service" institutions. In addition, it envisages special schools becoming resources for all other schools through improved district support services.

The paper plans for a first period of three years in which 30 schools and colleges become full-service, with subsequent expansion – over a period of 20 years – to 500 institutions. (At a later point it seems the 30 and 500 refer only to primary schools, amounting to 0.5% and 2.5% respectively of the 20,000 primary schools then in operation.) In the same three years 30 special schools would become resources for other ordinary schools, increasing to a total of 380 over the 20-year period. The initial schools would be in the 30 districts of the national district development programme, with later expansion so as to have at least one in each district. Much emphasis is also placed on the establishment of district-based support teams that coordinate a range of professional services and expertise. The emphasis on schools and support, and use of the term "inclusion" rather than "mainstreaming", reflect the view that learning disabilities are created by deficiencies or barriers in the education system rather than inherent in the learner. However, it is also acknowledged that some children have "impairments" that create barriers arising from organic or medical causes.

Then Minister Asmal, in his introduction to White Paper 6, expresses the hope that government will be able to convince parents of approximately 280,000 out-of-school disabled children under 18 years "that the place of these children is not one of isolation in dark backrooms and sheds." The 280,000 was derived by applying the 2.2%-2.6% estimate of the World Health Organisation of the percentage of learners in any school system that could be identified as disabled or impaired, and applying this to the South African school population of the time to arrive at a maximum of about 400,000 disabled or impaired learners. This seems a

very rough – and misleading – projection as it assumes a similar percentage across countries, more or less full school enrolment, and that all disabled and impaired learners should be in special schools. The White Paper’s comparison of the distribution of special schools with the disabled population is also rough in that estimates of disability in the full population (6.6%), rather than in the school-age population, are used. As seen in the previous section, for school-age children the incidence of disability as proxied by “a lot” of difficulty or completely inability to undertake certain tasks is nearer 4% than 6% or more. Nevertheless, as is clear from Table 20 below, provision was severely skewed provincially. Further, few if any will dispute that there was – and is – serious under-provision for children with special needs.

The White Paper notes that the enormous differences in the per learner expenditure on children in special schools – ranging from R11,049 in Gauteng to R28,635 in the Western Cape and R22,627 in the Free State – highlight the need for national provisioning norms. Resources would be needed for changes in the physical environment, materials as well as professional development for staff. The White Paper also motivates for resourcing of advocacy and mobilisation.

Chapter 3 of the White Paper describes a “revised funding strategy” to provide the resources for implementation. The chapter recognises the unlikelihood of substantial additional public funds being allocated for inclusive education in the near future. However, it also recognises that some additional funding is needed for special needs education, including from provincial education budgets as well as local and international donors. The strategy of limiting the number of special schools while establishing full-service schools is in part motivated on economic grounds, namely that substantial expansion of special school provision is unaffordable.

The White Paper proposes that a new conditional grant be established in the first five years. Fourteen years later, there has been no such grant established. The conditional grant was proposed for funding of non-personnel costs associated with facilities and other material resources to increase access for those excluded from the system as well as the medication, devices, guide dogs, interpreters, voice-activated computers, social workers and other resources need to facilitate learning. On the personnel side, no extra resources were envisaged, but instead more efficient usage of available resources. Donor funding was to be sourced for activities such as an audit of public and independent special schools and a national campaign.

The White Paper envisaged research being undertaken on costing of an ideal district support team, conversion of special schools to special schools/resource centres, an ideal full-service school, a full-service technical college and non-

personnel expenditure requirements. Research was also to be done on minimum levels of provision for learners with special needs in higher education institutions, a personnel plan.

Subsequent policy documents

The Department of Education’s draft Guidelines for Inclusive Learning Programmes of 2005 provides the following definitions of the different types of schools that provide for learners with disabilities:

Full-service school. Ordinary schools which are specially equipped to address a full range of barriers to learning in an inclusive education setting. In addition to their ordinary learner population they will become accessible to most learners in an area who experience barriers to learning and provide the necessary support. In the initial implementation stages these full service schools will be models of institutional change which reflect effective inclusive cultures, policies and practices.

Special school. Schools equipped to deliver education to learners requiring high-intensive educational and other support either on a full-time or a part-time basis.

Special schools/ resource centres. These would be special schools which are transformed to fulfil a wider function of accommodating learners who have high intensity support needs, as well as providing a range of support services to ordinary schools, full-service schools as part of the District-based Support System.

The document also defines support programmes as “structured interventions delivered at schools and in classrooms within specific time frames.” These programmes are most likely to focus on curriculum support, but could include provision of physical and material resources such as transport, assistive devices, teaching and learning materials, and ramps.

The main body of the Guidelines document focuses primarily on approaches to teaching and learning, including curriculum, teaching methodologies, and assessment. There is little, if any, references to budgets and financing.

In 2009, the newly created (renamed) DBE produced Guidelines for Full-Service/Inclusive Schools. These were intended to set criteria against which schools districts and provinces could measure their progress. The preamble states that the guidelines will also provide incentives for schools to become inclusive, but the word “incentive” does not appear again. The document refers to the “key strategy” of designating and converting at least one primary school in each district to a full-service school, beginning with the 30 school districts of the national district development programme. However, it does not say whether the first step of 30 schools has been completed eight years after the 2001 policy was finalised. The fact that paragraph 1.5 of the Guidelines, which states that the “first cohort of full-

service schools will become examples of good practice”, is in the future tense is worrying in this respect. However, the document does refer to an “Inclusive Education field test” which it says took place in the period 2004-2009 and which informed these guidelines.¹

The Guidelines document observes that section 5 of the South African Schools Act (No. 79 of 1996) foresees all schools becoming full-service schools when it states that all public schools must admit learners and meet their requirements without unfairly discriminating, and the Head of Department and principal must respect the rights and wishes of the parents and learners when deciding on admissions. In the long-term, it therefore envisages not more than 3% of learners of every school having disabilities.

In the real world, where this is not (yet) possible, the document lists criteria to be utilised in deciding which schools to convert to full-service schools, and describes the provisioning and other requirements for such schools once identified. In terms of staff, it states that provisioning must be in line with the “post provisioning norms for full-service schools”. As noted below, it seems that these norms may not yet be available. However, the guidelines include a set of provisions. For example, a full-service school with more than 500 learners must have a full-time learning support teacher, while schools with fewer learners must be served by “itinerant” learning support educators who assist a cluster of schools. Teaching loads for other teachers must also be reduced, for example through hiring additional staff, so that they can provide inclusive learning. Full-service schools must receive support visits from specialised staff. They must also have teacher assistants who support the teachers in their tasks. Parents of children with disabilities must not have to pay for teacher assistants in order for their child to be admitted. If a full-service school admits deaf learners, some of the educators must be trained in South African Sign Language.

In terms of the school environment, the Guidelines list a number of requirements, including compliance with 2009 School Infrastructure Norms and 2009 Environmental Access

Guide, sufficient and accessible classrooms, and at least one toilet accessible for a person using a wheelchair. In terms of other material sources, the document makes reference to Guidelines on Assistive Technology and Specialised Equipment. It suggests that an audit be done to investigate the availability of the required software and hardware, an asset register, and a maintenance plan for all equipment.

Finally, the document emphasises the importance of appropriate transport to ensure that the school is accessible to learners with disabilities. It describes various requirements in terms of transport, and notes that transport subsidies should be included in the budget of a full-service school and should make provision for public transport fees, salaries for drivers and other personnel as well as, in some cases, purchase, maintenance and running costs of vehicles.

In a presentation to the portfolio committee in September 2014, DBE reported that it was in the process of developing funding norms for provinces on assistive devices, LTSM and resources more generally. The development of staffing norms in respect of teachers and other staff at school and district level was also “work in progress”. The development of “human resource provision norms for an inclusive system” had, however, been reported as part of the plan for 2013 in a DBE presentation to the portfolio committee on public service and administration in 2013.

Staffing

A Western Cape Education Department internal circular of August 2012 in respect of staffing of special public schools refers to revised post-provisioning norms approved by the (national) Heads of Education Committee in 2007, as well as recommended norms agreed in 2007 between the Western Cape department, teacher unions and school government body associations. Unfortunately, neither the revised national norms nor the Western Cape norms appear to be available on the Internet.

The national Department of Education’s Post Distribution Model for the Allocation of Educator Posts to Schools is available on the Internet. It is undated, but the fact that it refers to the Department of Education rather than DBE indicates that it was developed prior to 2009. The model is based on the concept of “weighted learners”. A weighted learner enrolment is calculated for each school, the weights for all schools are summed, and each school should then get the appropriate proportion – according to its weight – of the total educator pool. In a situation where the available funds do not cover the costs of all necessary staff, the system of weights apportions the shortfall across schools.

A relatively large number of factors are taken into account in determining the weight for an individual learner at a specific school. These include the maximum ideal

1. The answer to a parliamentary question in 2010 recorded that the 30 schools had been identified, and R10 million allocated for ten of the schools, of which eight had been fully converted and two were nearing completion. Responsibility for physical upgrading of the remaining 20 schools had been delegated to provinces. The same answer records that the field test included situational and needs analysis of 33 special schools and four full-service schools, which revealed “acute shortage of resources”. Subsequently, R9m had been allocated to provide assistive devices, materials resources and assistive technologies supplied to 7 special and 3 full-service schools, including at least one school in each province. Subsequently, 23 of the 37 schools received computers with alternative and augmentative software, and related training.

class size for a specific learning area or phase; the period load of educators; the need to promote particular learning areas in grades 10 to 12; the size (in terms of enrolment) of the school; the number of grades; whether there is more than one language instruction; access to the curriculum in respect of more expensive subjects; poverty; level of funding (100% except for 0% for Grade R) in the policy document; “ad hoc factors”; and disabilities of learners.

The undated document notes that norms with respect to teaching staff, therapists and psychologists have not yet been determined. The document therefore uses the norms of the 1998 Post Provisioning Model of 1998. The weightings for learners according to this old model are shown in the table below.

Table 6: Post provisioning weights for learners with different disabilities, 1998

Specifically Learning Disabled	3.0
Severely Mentally Handicapped	3.0
Epileptic	3.0
Cerebral Palsied	4.0
Physically Disabled	4.0
Severe Behaviour Problems	5.0
Hard of Hearing	5.0
Partially sighted	5.0
Blind	5.0
Deaf	5.0
Autistic	6.0

The 2005 Guidelines for Inclusive Learning Programmes refer to the following categories used for organising schools, funding and post provisioning in special education: Multiply disabled, deaf, hard of hearing, blind, partially sighted, deaf/blind, cerebral palsy, specific learning disability, behavioural disorder, mild or moderate intellectual disability, severe intellectual disability, physical disability, autistic spectrum disorders, epilepsy, attention deficit disorder, with/without hyperactivity. Some of the differences between this list and the categories shown in Table 6 relate to terminology. Other differences are more substantial, and suggest that the list in the table above was no longer in use in 2005. However, it seems likely that the conceptual approach underlying the 1998 model is still in place.

The earlier undated document notes that weights based on curriculum, school phase, instruction medium, and whether both primary and secondary schooling are

provided do not apply to learners with disabilities. Stated differently, it seems that learners with disabilities will not “score” extra for these aspects. Learners with mild to moderate learning disability, who would be accommodated in ordinary schools, are weighted according to the standard factors. Those attending special schools where they receive vocational training have a weight of 2.5.

Infrastructure

The Department of Basic Education’s 2010 National Policy for an Equitable Provision of an Enabling School Physical Teaching and Learning Environment, despite its title, also says very little about budgets and financing. The discussion (in paragraph 2.8) of the requirement in the National Building Regulations of 1986 that all new buildings “must be accessible to all” notes that full service schools built before 1986 will need to be adapted, and all new schools will need appropriate infrastructure as well as furniture. However, paragraph 2.81 includes the more cautious observation that “the feasibility of the set policy targets may need to be reconsidered as their cost implications on the physical environment and their demand on implementation capacity are evident.”

The DBE’s 2012 Guidelines Relating to Planning for Public School Infrastructure propose an average space per learner of 2.4m² for learners with disabilities, as against 1.2m² to 1.5m² for ordinary primary and secondary school. There are further references to the needs of learners with disabilities in the sections on comfort levels and comfort levels, as follows:

16. Comfort levels

16.1. School facilities should be suited to the needs and requirements of learners with a disability.

16.2. Schools should facilitate access and functionality in accordance with the principles embedded in White Paper 6 on Inclusive Education, and should also be in line with universal access guidelines.

18. Architectural design

18.1. Measures that are essential for architectural design include –

18.1.2.4. Acoustics and access for people with special needs.

Section 6 of the 2013 regulations on minimum norms and standards for public school infrastructure describes the requirements for universal access. The section focuses on physical disabilities, and reads as follows:

(1) All schools must adhere to the requirements and principles of Universal Design. This will apply to all buildings, access ways, indoor and outdoor facilities as well as signage, communication and other services in new schools and to additions, alterations and improvements to existing schools.

(2) In addition to the requirements contained in

subregulation (1), schools for learners with special education needs must comply with the requirements related to the nature of the specialised support programme offered at the school, and the level of support required at that particular school.

(3) (a) Schools for learners with special education needs must be fully accessible, and such access includes ramps, handrails and space for manoeuvrability for all learners and educators.

(b) For the purposes of paragraph (a) minimum Universal Design requirements must include, but not be limited to, the following:

(i) Clear floor area in passages, walkways and points of ingress for people using wheelchairs and other mobility devices and aids;

(ii) parking for persons with disabilities to be located as close as possible to entrance areas;

(iii) ramps and handrails with regulated gradients, heights and spacing;

(iv) toilets for the disabled must meet the requirements of the National Building Regulations;

(v) all schools must be provided with adequate notice boards which are accessible for all users in the school building and which contain signage that is visible and legible;

(vi) tactile signage should be provided for learners and educators with impaired vision;

(vii) visual aids should be provided for communication with learners and educators who are deaf or hearing impaired; and

(viii) all other aspects of Universal Design must be compliant with the relevant requirements of the National Building Regulations and SANS 10400.

The provincial budgets

Location and scope of provision for special education in the budget

The provincial education budgets include a dedicated programme for Special Public Schools Education. It seems that this programme probably covers most of the costs associated with inclusive education although there are conflicting messages as to whether the programme provides for inclusive education beyond the special schools. For example, Eastern Cape describes the special schools programme as providing for “compulsory public education in special schools”. Other provinces describe it more broadly both in terms of type and level of schooling covered, and provision for inclusive education beyond the special schools. For example, Gauteng in the general discussion in the vote describes Special Schools Education as “provision of schooling to all learners with special educational needs in the province currently from the compulsory schooling band and older (Grade 1 to Grade 12), and non-formal education programmes.” It describes the special schools programme as providing “compulsory public education in special schools in accordance with the South African Schools Act and White Paper 6 on inclusive education”. However, the discussion of expenditures trends for this programme includes reference to what will be done in terms of extension of full service schools. Similarly, Free State and North West describe plans for full service schools when discussing allocations for the special schools education programme.

Mpumalanga’s description of the programme also names the Child Justice Act (no. 75 of 2008). In particular, it refers to the reform schools and schools of industry. Section 196 of the Children’s Act (no. 38 of 2005, as amended) required that all reform schools and schools of industry be

transferred from the provincial departments of education to the provincial departments of social development by end March 2012. This would ensure that the children in these types of child and youth care centres receive the necessary developmental and therapeutic programmes from social service professionals.

In 2012 there were six reform schools in four provinces (Eastern Cape (2), KwaZulu-Natal, Mpumalanga, and Western Cape (2)), and 15 schools of industry (Eastern Cape, Free State (2), Gauteng (2), Kwazulu-Natal (3) North West, Mpumalanga (3), and Western Cape (3)). Thus all provinces except Limpopo and Northern Cape had at least one such institution. Analysis of the budget votes for provincial departments of social development for 2012 and 2013 suggest that not all provinces may have effected the transfer on time, but some did do so, or did so with some delay (Budlender & Proudlock, 2012; 2013). Whether transferred or not, section 196(2) states that the provincial departments of education remains responsible for providing education to children residing in the child and youth care centres.

Nevertheless, most provinces do not mention the reform schools and schools of industry when discussing the special school education programme. Mpumalanga is an exception in this respect. In describing the objective of the programme it refers to the Child Justice Act (no. 38 of 2005). It subsequently clarifies that four of the 19 special schools that it supports relate to learners in need of care and protection (schools of industry) and those in conflict with the law (reform schools), and that three of schools are part of child and youth care centres that were transferred to the department of social development as from April 2013. The fourth is to be converted to a special school for learners with

moderate intellectual disabilities.

Mpumalanga also offers more details than other provinces on the type of education provided in special schools. It reports that nine of the 15 schools cater for children needing “high level” support, while six cater for those needing “moderate level” support. The former offer adapted curricula up to Grade 7, while the latter offer adapted curriculum up to Grade 10 as well as pre-vocational skills. Two of the child and youth care centre schools offer tuition up to grade 12. It is likely that other provinces also provide for the reform schools and schools of industry from this budget programme, thus reducing the funds available for other children with disabilities.

North West is unusual in having a strategic goal for the department as a whole that relates to inclusive education, whereas most other provinces hardly mention special education outside of the discussion of the dedicated programme. North West’s goal reads as follows:

Expanded inclusive education: To ensure that mainstream schools’ infrastructure is rehabilitated to be accessible to learners with minor disabilities; that educators are trained to identify learners with serious disabilities for referral to special schools; and that the curriculum needs of these learners are taken care of so that all learners with learning barriers are well catered for in Full Service Schools.

North West’s general narrative expands on what will be

provided for special schools, highlight assistive devices, transport, economy-related skills development, professional support through psychologists, social workers and occupational therapists, and physical infrastructure among others.

Western Cape has a less specific reference to special education in its listing of strategic objectives found in the Annual Performance Plan. The objective to “maximise successful academic and social participation of all learners in the culture and curriculum of educational institutions and minimise barriers to learning” is explicitly referenced to Education White Paper 6).

The budget numbers

Table 7 shows the expenditure and allocations, in millions of rand, for each of the nine provinces over the period 2010/11 through 2016/17. The amount for 2010/11-2012/13 represent actual expenditure. The first amount for 2013/14 is the amount voted by the provincial legislature just before the start of the financial year; the second amount is the amount agreed upon mid-year (around October) allowing for mid-year adjustments to the original voted amount; the third amount is what the provincial department expected to have spent by the end of the financial year at the time the 2014 budget was tabled. The amount for 2014/15 is the amount voted by the legislature in February/ March 2014, while the amounts for the next two years are estimates of expected allocations.

Table 7: Public Special School Expenditure and Allocations (Rm)

PROV	2010/11	2011/12	2012/13	2013/14			2014/15	2015/16	2016/17
				MAIN	ADJUST	REVISED			
EC	383	435	445	494	495	493	542	572	611
FS	240	291	313	290	354	354	388	395	378
GT	1,278	1,291	1,444	1,612	1,675	1,675	1,817	1,874	1,948
KZ	574	726	728	751	777	826	844	864	912
LM	258	289	322	327	356	359	380	400	430
MP	170	191	198	212	213	213	219	234	248
NC	78	83	84	97	90	89	84	89	92
NW	219	241	275	288	331	331	354	373	402
WC	688	755	820	895	908	908	1,043	1,068	1,136
TOTAL	3,889	4,301	4,628	4,967	5,199	5,246	5,671	5,869	6,156

For 2014/15, the nine provinces combined allocated R5.7 billion. As noted already above, Gauteng and Western Cape have above average allocations. If one compares the main and adjusted allocations, several provinces show an

increase. This may be related to the occupation-specific dispensation for therapists discussed below, for which a conditional grant was introduced in 2014/15. At first glance all provinces seem to show a steady increase in allocations

over time. This seemingly positive picture has several caveats.

Firstly, the expenditure and allocations shown above are in nominal terms, uncorrected for inflation. If the allocations for the medium-term expenditure framework (MTEF) period of 2014/15-2016/17 are corrected for inflation using the inflation rates prescribed by National Treasury for all expenditures other than compensation of employees (namely 5.5, 5.4 and 5.4% respectively) for the three years of the MTEF and Statistics South Africa's historical consumer price index numbers for 2010/11-2013/14, we get the real increases shown in Table 8 below. The first set of 3-year increases in the table shows the increases over the MTEF period. The second set of 3-year increases shows the increases for the previous three-year period i.e. 2010/11-2013/14.

Over all provinces combined there is no change in the allocation over the three years of the MTEF, despite a new conditional grant in two of the years. Eastern Cape and Western Cape show small average increases of 2%, and Limpopo and North West small average increases of 1% each. Northern Cape and Free State both show clear average decreases. For the previous period from 2010/11-2013/14 the picture is more positive, with a 4% average real increase per year, and positive increases in all provinces except Northern Cape. Northern Cape explains the decrease for 2014/15 as reflecting underspending (of a much increased allocation for 2014/15) as well as "reprioritisation".

North West shows a very pleasing real average increase of 9% per year and Free State 8%. However, comparison of the MTEF and previous three-year averages suggests that the provinces have less commitment than previously to improvements in public special school education that they may have had.²

Table 8: Real increases in Public Special School Education programme, 2014/15-2016/17

	2014/15	2015/16	2016/17	MTEF 3-YEAR AVERAGE	PREVIOUS 3-YEAR AVERAGE
EC	4%	0%	1%	2%	3%
FS	4%	-3%	-9%	-3%	8%
GT	3%	-2%	-1%	0%	4%
KZ	3%	-3%	0%	0%	5%
LM	1%	0%	2%	1%	6%
MP	-2%	1%	1%	0%	2%
NC	-12%	0%	-2%	-5%	-1%
NW	2%	0%	2%	1%	9%
WC	9%	-3%	1%	2%	4%
Total	3%	-2%	0%	0%	4%

The decrease in allocations for Free State over the MTEF are surprising as the narrative in the province's budget vote suggests that this province is more committed than most others to inclusive education. The vote states that the special schools budget has been "tremendously increased to ensure that these schools are supplied with assistive devices, skills development equipment and ICT resources for meaningful teaching and learning." It states further that the "strengthening of special and full service schools remains key priority for the upcoming financial year." Plans include additional staffing for full service district based teams, training of officials on inclusive practices, procurement of specialised LTSM, conversion of 12 public ordinary schools into full service schools, and conducting of Developmental Quality Assurance at two special schools, all in 2014/15. In subsequent years there are, however, sharp decreases in the budget allocation with the 2016/17 allocation 3% smaller in real terms than the adjusted allocation for 2013/14.

Gauteng also has an increase for 2014/15 followed by real decreases in the following two years. The increase in 2014/15 is explained as being to cover the resources and support (including teacher development) needed by 109 special schools, an increase from 19 to 45 full service schools, provision of assistive devices at special schools as well as the temporary conditional grant for therapists (see below). Overall, the increase is seen, in particular, in staffing costs. The increases reflect, among others, the conditional grant as well as recruitment of class assistants for special schools.

Limpopo states that, in light of "huge under resourcing in its Special Schools and the budget constraints that militate against fully addressing this challenge", it is finalising plans for a special school that will cater for learners with all types of disabilities that are not catered for by full service schools. It does not, however, state whether the plans have got to the stage where it can and has allocated budget for this special school.

2. (More detailed examination shows that 2011/12 and 2013/14 tended to have larger increases than 2012/13. This could perhaps reflect decreases due to shifting of reform schools and schools of industry to the Department of Social Development in 2012/13.

Mpumalanga reports that 2014/15 will see the introduction of full-service schools. It also states that the public special school education is “significantly increased over the 2014 period and this is indicative of the level of importance given to this programme”. These statements are not supported by the patterns shown in Table 8. In addition to referring to the “significant” increase, the province refers to a decrease in the budget from 2013/14 and into the 2014 MTEF, which it explains by the transfer of the residential facilities of child and youth care centres to the department of social development. However, it is not clear why one would expect further decreases after 2013 in respect of these centres.

North West’s budget book reports “significant growth over the 2014 MTEF” for this programme but, as seen above, there is limited real growth after correcting for inflation. The province explains the “significant” increase from 2011/12 forward as reflecting a focus on expanding inclusive education in public ordinary schools (rather than special schools).

Table 9 uses another measure – the percentage that the public special schools programme constitutes of the total Education vote for the province concerned. For all provinces combined the table suggests a very slightly increasing trend over the period. However, even at the end of the period the programme accounts for only 3% of the total budget. Western Cape and Gauteng allocate a higher percentage of their budgets to this programme than other provinces, but Gauteng’s percentage drops over the period while Western Cape’s increases. North West shows an increase that brings it to the average position. Eastern Cape’s percentage also increases but by the end of the period is still lower than the average. Northern Cape’s allocation falls as a percentage of total Education. Further, throughout the period Northern Cape’s percentage is lower than the country average despite the province having – as seen above – an above-average prevalence of disability. KwaZulu-Natal, which – as also seen above – has the largest absolute number of children with disabilities, also allocates a below-average proportion of its Education budget to this programme.

Table 9: Public Special School Education as % of total Education vote, 2010/11-2016/17

PROV	2010/11	2011/12	2012/13	2013/14			2014/15	2015/16	2016/17
				MAIN	ADJUST	REVISED			
EC	1.7%	1.7%	1.7%	1.8%	1.8%	1.8%	1.9%	1.9%	2.1%
FS	2.8%	3.0%	3.0%	2.8%	3.3%	3.0%	3.4%	3.3%	3.2%
GT	5.7%	4.9%	5.1%	5.5%	5.5%	5.4%	5.5%	5.2%	5.2%
KZ	2.0%	2.1%	2.0%	2.0%	2.1%	2.2%	2.1%	2.0%	2.1%
LM	1.3%	1.4%	1.5%	1.4%	1.5%	1.5%	1.5%	1.6%	1.6%
MP	1.5%	1.5%	1.4%	1.4%	1.4%	1.4%	1.4%	1.3%	1.4%
NC	2.3%	2.0%	2.0%	2.2%	2.0%	1.9%	1.8%	1.8%	1.9%
NW	2.4%	2.4%	2.6%	2.5%	2.9%	2.9%	2.9%	2.8%	3.0%
WC	5.8%	5.6%	5.7%	5.7%	5.8%	5.8%	6.3%	6.0%	6.3%
TOTAL	2.8%	2.7%	2.8%	2.9%	2.9%	2.9%	3.0%	2.9%	3.0%

The percentages shown for the nine provinces combined is more or less identical to the 2.8% of the total education budget allocated to special schools reported in White Paper 6 of 2001. The White Paper reports a range from 1.5% in North West to 7.0% in the Western Cape. The range is not very different in 2014/15 although the province with the lowest percentage is now Mpumalanga, while at the top end Western Cape’s percentage has fallen slightly. The overall picture is thus one of little, if any, improvement since 2001.

The budget sub-programmes

Provinces have two to four sub-programmes within the public special school education programme, as follows:

- + Schools
- + Human Resource Development (or “Management” in at least one province)
- + School Sport, Culture and Media Services
- + Conditional Grant OSD [occupation-specific dispensation] Therapists

Eastern Cape's budget vote describes the four programmes as follows:

- + Special Schools provides specific public special schools with resources;
- + Human Resource provides HR services to the programme;
- + School sport, culture and media services provides additional and departmentally managed sporting, cultural and reading activities in public special schools; and
- + Conditional Grants is responsible for projects specified by DBE and funded by conditional grants.

The Schools sub-programme is by far the largest, accounting for 98% or more of each province's programme budget throughout the period. For all years except 2014/15 and 2015/16 for all provinces combined the allocation for this sub-programme is 99.6% or more. 2014/15 (at 96%) and 2015/16 (at 98%) are different because of the conditional grant in these two years.

The other programmes do not merit much attention given the very small amounts allocated. The following tables for the period 2013/14-2016/17 are nevertheless presented so as to provide a full picture, and also to illustrate how some provinces do not have some of these sub-programmes at all. To simplify matter, for 2013/14, only the adjusted amount is shown.

Table 10: Allocations for smaller sub-programmes, 2013/14-2016/17³

	2013/14	2014/15	2015/16	2016/17
HUMAN RESOURCE DEVELOPMENT				
EC	2,235	2,374	2,382	2,511
FS				
GT	1,686	1,769	1,850	1,948
KZ	4,500	4,000	4,000	4,212
LM	806	850	2,237	2,357
MP				
NC	414	435	455	479
NW	2,248	2,360	2,478	2,609
WC	1	1	1	1
TOTAL	11,890	11,789	13,403	14,117

SCHOOL SPORT, CULTURE, MEDIA				
EC	4,916	6,669	6,768	7,134
FS	107	0	0	0
GT	1,082	1,135	1,187	1,250
KZ	0	0	0	0
LM	988	1,088	1,138	1,198
MP	0	0	0	0
NC	1,000	1,100	1,300	1,369
NW	0	0	0	0
WC	0	0	0	0
TOTAL	8,093	9,992	10,393	10,951

CONDITIONAL GRANT OSD THERAPISTS				
EC	0	6,571	2,067	0
FS	0	18,358	5,775	0
GT	0	93,599	29,442	0
KZ	0	41,581	13,079	0
LM	0	0	0	0
MP	0	1,072	337	0
NC	0	0	0	0
NW	0	1,417	446	4,960
WC	0	50,395	15,852	0
TOTAL	0	212,993	66,998	4,960

3. The North West allocation recorded for the conditional grant for 2016/17 is surprising as there is no allocation for 2016/17 in the Division of Revenue Bill. Northern Cape's budget documents also do not record the R7,000 and R2,000 recorded in the Division of Revenue Bill for 2014/15 and 2015/16 respectively as a separate sub-programme.

The Division of Revenue Bill describes the purpose of the OSD grant as being to increase the baseline of the compensation budget to enable compliance with the Education Labour Relations Council Collective Agreement 1 of 2012. This suggests that the additional expenditure will not result in an increase in the number of therapists (and thus extent of services), but instead see existing therapists receive higher salaries. The conditional grant is planned for two years only – with a total R213m in 2014/15 and R67m in 2015/16. These amounts are intended, among others, to assist provinces with backpay to July 2010. After this provinces are expected to cover these costs from the equitable share.

Separating out the small sub-programmes allows us to re-examine the real increases in allocations for the schools sub-programme over the MTEF period without the distortion caused by the two-year conditional grant. Table 11 reveals a picture that is almost identical to the worrying one for the programme as a whole. This is not surprising given that this sub-programme accounts for 98% or more of the programme budget.

Table 11: Real increases in schools sub-programme, 2014/15-2016/17

	2014/15	2015/16	2016/17	MTEF 3-YEAR AVERAGE	PREVIOUS 3-YEAR AVERAGE
EC	2%	1%	2%	2%	3%
FS	-1%	0%	-8%	-3%	8%
GT	-2%	2%	0%	0%	4%
KZ	-2%	1%	2%	0%	5%
LM	1%	0%	2%	1%	5%
MP	-3%	1%	1%	0%	2%
NC	-12%	0%	-2%	-5%	-1%
NW	1%	0%	1%	1%	8%
WC	4%	1%	2%	2%	4%
Total	0%	1%	1%	0%	4%

Finally, a presentation by DBE to the parliamentary portfolio committee of September 2014 provides more detail than is provided in the provincial budget votes. The presentation contains a table showing allocations and expenditure for “expansion of inclusive education”. Table 12 shows that only five provinces allocated funds for this purpose in 2013/14 and 2014/15, and only 73% of the 2013/14 adjusted budget was spent for these five provinces. The under-expenditure would be even worse if Mpumalanga – which overspent with 124% - was excluded. Limpopo spent only 38% of its adjusted allocation.

Table 12: Expansion of inclusive education expenditure (R000s)

	2013/14 MAIN	ADJUSTMENT	2013/14 ADJUSTED	EXPENDITURE	2014/15
FS	14,226	(7,513)	6,713	5,322	1,330
GP	38,614	16,800	55,414	22,637	40,506
LP	13,014		13,014	4,948	8,640
MP	53,155		53,155	66,059	56,090
WC	76,871		76,871	62,858	81,748
TOTAL	144,076		205,167	161,824	188,314

Source: Department of Education, 9 September 2014a

Economic classification

Further examination of the economic classification (i.e. broad line items) reveals that two items – compensation of employees and transfers to non-profit institutions (NPIs) account for the overwhelming bulk of the Special School Education expenditure.

Compensation of employees covers expenditure on salaries and related costs. It includes such payments for

departmental officials as well as any educators/teachers and other staff funded by the department in the public schools. Unfortunately, the budget documents do not distinguish between allocations for educators and other staff. They also do not disaggregate the number of staff employed by programme. This limits the analysis that can be done. Table 1 reveals that for the country as a whole compensation of employees accounts for 80% or more of

the programme in all years except 2010/11. North West is the only province in which this category of expenditure accounts for less than 80% throughout the period. In Mpumalanga the category accounts for less than 80%

until 2013/14 but in the MTEF period the percentage is more the 80%. Free State and Limpopo tend to have a higher proportion of their budget going to this category of expenditure than other provinces.

Table 13: Compensation of employees as % of Special School Education programme

	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17
EC	84%	81%	84%	84%	81%	79%	79%
FS	82%	80%	84%	87%	87%	87%	96%
GT	76%	83%	81%	81%	82%	82%	82%
KZ	78%	84%	86%	78%	82%	82%	82%
LM	79%	87%	86%	85%	87%	87%	87%
MP	78%	75%	77%	78%	82%	81%	81%
NC	87%	89%	89%	85%	83%	83%	83%
NW	72%	77%	77%	78%	78%	78%	78%
WC	80%	80%	82%	83%	83%	83%	83%
TOTAL	78%	82%	82%	82%	83%	82%	83%

Transfers to NPIs consists primarily of payments made to schools to cover non-personnel costs. The South African Schools Act (No 84 of 1996) distinguishes between “section 20” and “section 21” schools. The provincial government is responsible for purchasing textbooks and stationery, paying utility accounts, and providing for maintenance of section 20 schools. These items are thus provided for in the appropriate line items of the provincial budget. In contrast, where a school governing body has successfully applied for section 21 status, funds for learner teacher support materials (LTSM) such as textbooks and stationery, equipment, utilities, general building maintenance and, in some cases even school nutrition, are transferred to the school’s bank account. In these cases the funds are included under transfers to NPIs and it is not possible

to identify the division between the different types of expenditure. Limpopo observes that having schools responsible for their own procurement of LTSM is advantageous as the schools know what their “unique” requirements are.

Table 14 shows transfers to NPIs ranging from 10% (in Northern Cape) to 21% (in North West) for 2014/15. Overall, 15% of the special schools education budget goes on transfers to NPIs, with the percentage more or less constant over the period 2010/11 to 2016/17. Some provinces show anomalies for particular years (Free State for 2016/17, Gauteng for 2010/11, and Limpopo for 2010/11). Western Cape shows a clear decrease in the proportion going to transfers to NPIs over the period. These patterns are not explained in the 2014 budget votes.

Table 14: Transfers to NPIs as % of Special School Education programme

	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17
EC	15%	14%	14%	11%	12%	13%	13%
FS	18%	19%	16%	13%	13%	13%	4%
GT	23%	16%	16%	17%	17%	17%	17%
KZ	12%	14%	12%	18%	17%	17%	17%
LM	20%	13%	13%	13%	13%	13%	12%
MP	18%	20%	18%	15%	15%	15%	14%
NC	9%	7%	7%	9%	10%	10%	10%
NW	19%	21%	21%	21%	21%	21%	20%
WC	18%	17%	16%	16%	13%	13%	13%
TOTAL	18%	16%	15%	16%	15%	16%	15%

KwaZulu-Natal's narrative states that the increase in transfers from 2011/12 onwards reflects the province's attempts to ensure that schools have the resources they need, including assistive devices. It states that from 2014/15 onwards more schools will be doing their own procurement of such devices, which will mean decreases in the goods and services category. A warning note in respect of NPI transfers is that KwaZulu-Natal reports the fluctuations in spending between 2010/11 and 2012/13 reflect underspending when the province did not transfer funds due to (unspecified) "non-compliance" by some special schools. This suggests that some schools are not receiving the funds they need.

North West notes that the increases in transfers in 2014/15 are primarily intended to cover higher-than-inflation costs in electricity and security services. This observation suggests that budget increases seen in other provinces will not necessarily translate into increases in quality and quantity of services delivered to beneficiaries.

The fact that the budget documents do not show

expenditure on LTSM for Section 21 schools separately does not explain the erratic picture shown in Table 15 where Mpumalanga is the only province which consistently allocates more than R1 million to LTSM over the seven years, while Western Cape consistently allocates R195,000 or more each year. North West records no allocations for LTSM over the period, while Northern Cape records a tiny allocation and only in 2011/12. Free State and KwaZulu-Natal record allocations only for 2010/11 and 2011/12. The fact that transfers to NPIs in these two provinces do not increase noticeably in 2012/13 suggests that the absence of LTSM allocations from 2012/13 onwards cannot be explained by the expenditures subsequently being included in NPI transfers. The marked increase in Eastern Cape's allocations for LTSM over the MTEF period give credence to the province's 2014 budget vote which says that the department's revision of its baselines included provision of LTSM and general school funding in terms of norms and standards for section 20 and 21 school, public special schools and ECD centres.

Table 15: Expenditure and allocations for LTSM in Special School Education (R000s)

	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17
EC				1,000	8,494	6,097	6,426
FS	202	40					
GT	3,924	5	12,357	4,367	229	240	253
KZ	2,981	72					
LM							
MP	6,451	4,647	1,866	6,675	6,379	6,723	7,079
NC		2					
NW							
WC	588	672	195	583	615	549	648
TOTAL	14,146	5,438	14,418	12,625	15,717	13,609	14,406

No allocations are recorded for Limpopo in the table above as the budget vote does not disaggregate expenditure to this level of category. However, the budget narrative states that the department has allocated R1.2 million for procurement of Braille embossers so that it can produce its own materials for visually impaired learners.

A presentation by the national Department of Basic Education (DBE) to the portfolio committee on basic education in September 2014 includes a detailed table showing procurement, by province, of AAC devices (1,885 in total), braille typewriters (443), crutches (518), hearing [aids?] (3,349), wheelchairs (1,104) and "other" (1,345) across 227 schools. It

does not say to which period the information relates.

Transport constitutes another important area of expenditure. Indeed, the recent intergovernmental review (National Treasury, 2015) attributes the increase in allocations to the public special school programme over the MTEF to prioritisation of learners with special needs and transport for these learners. However, solid budget information on the issue of transport is even scarcer than for LTSM.

In the more general discussion of learner transport, the review notes that provincial education and transport departments are jointly responsible for learner transport, but that the partnership does not work at all smoothly. It notes that

the national Department of Transport is formulating a national policy on the topic and suggests that provincial departments should work together to develop a national policy.

It is not clear where, if at all, the public special school education budgets make provision for learner transport. In the period 2010/11 to 2013/14 several of the provinces record amounts, often erratic, for an item named "Transport provided: Departmental activity". None of the provinces have amounts recorded for this item from 2014/15 onwards.

Section 27 is also interested in allocations for training of educators. At the portfolio committee meeting in March 2013, the Deputy Minister of Women, Children and People with Disabilities observed that when she had attended special education, only teachers with appropriate qualifications would have been permitted to teach. However, since 1994 this was no longer the case. The DBE's presentation to the parliamentary committee of September 2014 notes that expenditure on training "is minimal, leaving large percentage of teachers without specialised qualifications." Unfortunately, the budget votes do not disaggregate training expenditure or number of trainees by programme. The presentation to the committee records training for teachers and government officials in sign language and braille, as shown in Table 16. The distribution across provinces is extremely uneven, with Mpumalanga accounting for more than two-thirds of the sign language

trainees and nearly half of the braille trainees. It is likely that training-related expenditure accounts for some of the over-expenditure shown in the table above. Free State, KwaZulu-Natal, Limpopo and Western Cape record no trainees for either of these areas.

Table 16: Teachers and officials trained in South African Sign Language in 2013/14

PROVINCE	SIGN LANGUAGE	BRILLE
EC	94	60
FS	0	0
GP	130	50
KZN	0	0
LP	0	0
MP	576	140
NC	28	11
NW	58	50
WC	0	0
TOTAL	886	311

Provincial infrastructure budgets

In addition to the Special School Education programme, provinces' Infrastructure budget programme within the Education vote include a sub-programme relating to infrastructure for special schools. All provinces except Limpopo allocate funds for this sub-programme, although the allocations in Northern Cape are erratic. KwaZulu-Natal has the largest allocations in all years, with other provinces showing more erratic patterns. For the most part, the funds are sourced from the Education Infrastructure Grant, which is a conditional grant from national DBE. The 2014 Division of Revenue Bill describes the purpose of the EIG as being "to help accelerate construction, maintenance, upgrading and rehabilitation of new and existing infrastructure in education to enhance capacity to deliver infrastructure in education; to address damage to infrastructure caused by floods." Provinces are free to allocate the grant across the different programme areas.

Table 17 shows that many provinces do not indicate any allocation for special school infrastructure in 2016/17. This is explained by the fact that the Division of Revenue Bill of 2014 indicates provincial allocations only for 2014/15 and 2015/16. Further, in 2014 it was announced an incentive

system would be introduced for this grant. This is reflected by an amount that is not yet allocated between provinces for 2015/16, and the full allocation being unallocated between provinces for 2016/17.

Table 17: Special School Infrastructure expenditure and allocations, 2010/11-2016/17 (R000s)

	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17
EC	38,373	55,308	86,989	171,493	273,053	199,604	0
FS	4,965	0	0	23,387	32,273	31,500	0
GT	18	6,588	28,265	44,891	185,490	262,000	52,000
KZ	69,889	154,216	225,780	381,131	392,463	404,947	426,409
LM	0	0	0	0	0	0	0
MP	1,533	45,320	49,742	53,155	97,717	121,908	0
NC	11,291	29,025	0	1,700	0	0	0
NW	8,052	7,948	51,052	64,756	77,757	45,934	0
WC	55,390	36,790	14,683	7,000	53,977	67,782	13,201
TOTAL	189,511	335,195	456,511	747,513	1,112,730	1,133,675	491,610

Table 17 shows the adjusted budget for 2013/14. Comparison of the main allocations (not shown in the table) and adjusted allocations shows three provinces (Free State, Gauteng and Western Cape) with lower adjusted than main allocations suggesting underspending or deprioritisation, while North West's adjusted budget is larger than the main allocation.

Table 18 shows Special School Infrastructure as a percentage addition to the Special School Programme. It shows, for example, that the infrastructure allocation adds more than 30% to the other Special School expenditure in

KwaZulu-Natal for each year from 2013/14 onwards. The budget vote for 2014 explains that the province is working towards ensuring that there is at least one special school in each district. Using the measure of addition to special school expenditure, Eastern Cape, KwaZulu-Natal and Mpumalanga prioritise infrastructure in the MTEF years, while Limpopo, Western Cape, Free State and Gauteng allocate relatively less. The relatively lower allocations in Gauteng and Western Cape could reflect somewhat better existing infrastructure.

Table 18: Special School Infrastructure as an addition to Special School expenditure and allocations

	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17
EC	9%	11%	16%	26%	34%	26%	0%
FS	2%	0%	0%	6%	8%	7%	0%
GT	0%	1%	2%	3%	9%	12%	3%
KZ	11%	18%	24%	33%	32%	32%	32%
LM	0%	0%	0%	0%	0%	0%	0%
MP	1%	19%	20%	20%	31%	34%	0%
NC	13%	26%	0%	2%	0%	0%	0%
NW	4%	3%	16%	16%	18%	11%	0%
WC	7%	5%	2%	1%	5%	6%	1%
TOTAL	5%	7%	9%	13%	16%	16%	7%

Table 19 provides a further measure of relative prioritisation by showing the allocation for special school infrastructure as a percentage of the total provincial Education Infrastructure

Grant for each of the first two years of the MTEF. Gauteng emerges as the leader here, followed by KwaZulu-Natal. Free State, North West and Western Cape allocate relatively

small proportions to special school infrastructure, although the percentages may be larger than the relative presence of learners with disability in their school populations. However, as noted above, the greater need of children with disabilities should be reflected in larger-than-average allocations.

Table 19: Special school infrastructure as % of provincial Education Infrastructure Grant

	2014/15	2015/16
EC	23%	12%
FS	6%	4%
GT	30%	31%
KZ	28%	21%
LM	0%	0%
MP	16%	14%
NC	0%	0%
NW	12%	5%
WC	11%	10%

Gauteng’s budget vote narrative records that the relatively large increase for special schools infrastructure will be used both for maintenance and rehabilitation of existing schools and for conversion of schools to full service schools.

The narrative in KwaZulu-Natal’s budget vote also bears out the importance attached to special needs infrastructure. Special schools are mentioned in both discussion of the past year’s infrastructure performance and that planned for 2014/15. The province announces that 10 schools “have been designed and are ready for roll-out in 2014/15.”

Northern Cape’s budget vote narrative reports that 68 classrooms in various schools had been identified for construction so as to convert the schools to full-service schools, with construction of 48 classrooms having commenced during 2013/14. However, all the tables above suggest minimal provision for the infrastructure needs of public special school education in Northern Cape.

The national budget

In its presentation to the portfolio committee of September 2014, DBE explained that its role in respect of inclusive education is to monitor and support provinces, but that it “cannot force provinces to do what it wants them to do. The department can only persuade them to do the best they can do and to spend their budget and ensure learners are not short-changed by virtue of them living in a particular province.”

The budget vote of the national Department of Basic Education for 2014 makes little reference to special schools and/or inclusive education. There are also no key performance indicators relating to special or inclusive education. Programme 2, Curriculum Policy, Support and Monitoring, includes funding for the inclusive education directorate, and is therefore the place where one would expect to find provision for schooling for persons with disabilities. The allocation is, however, not sufficiently disaggregated in 2014 to be able to identify how much is allocated for inclusive education. The discussion on posts notes an increase from 725 to 749 filled posts between 2012/13 and 2013/14 resulting from appointments of people responsible for home schooling in the inclusive education directorate. This point highlights the fact that the resources allocated for inclusive education provide for expenditure beyond that relating to children with disabilities. There is no mention of inclusive education or special schools in the 2014 narrative on Programme 2. The discussion of Programme 5, Educational Enrichment

Services, notes that learners in “identified” special schools in quintiles 1 to 3 will receive “nutritious meals”.

The DBE’s Annual Performance Plan for 2014-15 records the intention to provide training on inclusive education, with a focus on “curriculum differentiation and Screening, Identification, Assessment and Support”. It makes no mention of disability except in relation to departmental employees. The DBE’s September 2014 presentation to the portfolio committee on its first quarterly report similarly notes the publication of a draft screening, identification, assessment and support policy, as well as development of a training manual for teachers and deaf teacher assistants.

Given the very limited mention of inclusive education in the 2014 budget book, it is worth checking whether the picture was different in previous years. Again, however, there is very little.

In 2010, the DBE’s budget vote notes that approximately 1,700 blind and/or deaf learners “were reached through employing about 190 Braille and deaf educators.” This is reported in a paragraph discussing the Kha Ri Gude literacy

initiative, so it seems that the 1,700 are probably not children of school-going age. The 2010 vote is the only one that provides sufficient disaggregation to identify the allocation for Inclusive Education. The amount allocated for 2010/11, is R3.5 million. This is equivalent to only 3% of the sub-programme budget, 0.3% of the programme budget, and 0.06% of Basic Education as a whole).

In 2011, the DBE's budget vote has the following listed under "Objectives and measures":

Contribute to improving the performance of learners with special needs by:

- *Adapting the curriculum and learner support materials for learners in special schools, in line with the curriculum and assessment policy statements for learners in mainstream schools*

- *Providing training for managers and teachers in all schools for the visually and hearing impaired in 2011 and 2012.*

The 2012 budget vote is very similar, with the addition of "monitoring" in the second bullet point. It also reports in respect of 2011/12 that 196 provincial and district officials, and management teams of schools for the visual and hearing impaired, have been trained in respect of special needs at a cost of R6 million.

The 2013 budget vote has the objective "improve the implementation of inclusive education by developing training programmes for teachers and providing access to learning and teaching resource material for special schools in 2013/14." However, it makes no further references to schooling for children with disabilities or inclusive education.

Performance indicators

Trends in performance over the years

The White Paper of 2001 provides the following summary in respect of number, enrolment and cost of special schools per province. Table 20 clearly shows the relative advantage of Gauteng and Western Cape in terms of number and percentage of learners accommodated, as well as the number of special schools. Limpopo is the

worst off, followed by Eastern Cape, KwaZulu-Natal and Mpumalanga, in terms of the percentage of learners in special schools. In terms of expenditure per learner, Western Cape is best off, and North West and Eastern Cape worst off. The differences in per-learner expenditure in part reflect differential provision for learners of different race groups.

Table 20: Number, enrolment and expenditure of special schools, 2001

PROVINCE	SPECIAL SCHOOLS	LEARNERS IN SPECIAL SCHOOLS	% OF LEARNERS IN SPECIAL SCHOOLS	% DISTRIBUTION OF SCHOOLS	PER LEARNER EXPENDITURE
EC	41	6,483	0.3	11	13,746
FS	19	3,127	0.4	5	22,627
GT	96	25,451	1.6	25	11,049
KZ	58	7,631	0.3	15	21,254
LM	19	4,250	0.2	5	16,609
MP	15	2,692	0.3	4	17,839
NC	8	1,392	0.7	2	15,749
NW	42	4,364	0.5	11	13,015
WC	82	9,213	1.0	22	28,635
TOTAL	380	64,603	0.5	100	17,838

The recent intergovernmental review (National Treasury, 2015) reports that in 2013 there were 11,975,844 learners enrolled in 24,136 public ordinary schools. The number of learners in public special schools was said to have increased

from 102,057 in 2007 to 111,598 in 2012, while the number of special schools increased from 416 to 444 over the same period. This suggests a 9% increase in the number of schools together with a 58% increase in the number of learners over

the period 2001 to 2007, followed by increases of 6% and 9% respectively. For the period 2001 to 2012 as a whole, the increase in the total number of schools is 17%, while the increase in the number of learners is 73%. The size of the increases is lower than one might have expected more than ten years after the adoption of White Paper 6.

A presentation by DBE to the parliamentary committee in September 2014 provides more detail than is found in most other sources. The committee asked for this presentation after a hearing in March 2014 at which Disabled People South Africa presented.

Table 21 gives the provincial breakdown for special schools in 2012. If one compares with the previous table, North West shows fewer special schools than in 2001, while Western Cape shows no increase at all. The educator: learner ratio averages out at 11:1, which is much lower than the norm for public ordinary schools, which are 40:1 and 35:1 respectively for public primary schools and public secondary schools. However, the 11:1 average could hide wide variation within provinces. Further, the report on the meeting notes that “the quality of education in special schools remains challenging and has to be investigated.”

Table 21: Special school enrolment 2012

PROVINCE	SCHOOLS	LEARNERS	EDUCATORS	EDUCATOR: LEARNER RATIO	% DISTRIBUTION OF SCHOOLS
EC	42	9,117	854	11	9
FS	21	5,801	625	9	5
GP	131	41,184	3,393	12	30
KZN	72	16,264	1,393	12	16
LP	34	8,524	684	12	8
MP	20	3,549	355	10	5
NC	10	1,646	165	10	2
NW	32	5,437	465	12	7
WC	82	20,076	1,802	11	18
TOTAL	444	111,598	9,739	11	100

Source: Department of Education, 9 September 2014a

The final column of Table 21 suggests that inequity across provinces may have increased over the ten-plus years in that by 2012 Gauteng and KwaZulu-Natal account for an even larger percentage of special schools than before. Unfortunately neither the above table nor other available tables indicate whether provinces have reached the objective of White Paper 6 of having at least one special school and one full-service school in each district.

The DBE presentation of September 2014 includes a table showing special school provision for different categories of disability for the years 2011 to 2013, as well as a provincial breakdown by category of disability for 2013. Table 22 shows the three-year breakdown, including the percentage distribution for 2013. The totals indicate growth of 3-4% in total learners with disabilities over the period. Learners with mild to moderate intellectual disability account for more than a quarter (26% of the total), and those with severe intellectual disability for close on a further quarter (23%). It is not clear why children with mild intellectual disability and

some of the other categories of disability such as attention deficit disorder are accommodated in special schools. Their presence in these schools is especially worrying given that the discussion of statistics above suggests that access to schooling is lowest among children with serious disabilities.

Table 22: Provision for different disabilities, 2011-2013

DISABILITY	2011	2012	2013	% DISTRIBUTION 2013
Attention Deficit Disorder	3,077	3,956	3,396	3
Autistic Spectrum Disorder	2,190	2,852	2,753	2
Behavioural Disorder	5,123	4,843	4,427	4
Blind	1,136	1,259	1,307	1
Cerebral Palsy	6,591	6,651	6,127	5
Deaf	6,470	6,388	6,590	6
Deaf/Blind	35	34	122	0
Epilepsy	2,426	2,686	2,542	2
Hard of Hearing	1,363	1,503	1,347	1
Mild or Moderate Intellectual Disability	27,179	28,942	30,424	26
Multiple Disability			5	0
Other	5,179	6,009	10,780	9
Partially Sighted	2,493	2,598	2,495	2
Physical Disability	3,918	4,004	3,888	3
Psychiatric disorder	202	132	145	0
Severe Intellectual Disability	27,931	27,837	27,131	23
Specific Learning Disability	12,927	11,904	13,051	11
TOTAL	108,240	111,598	116,530	

Source: Department of Education, 9 September 2014a

Table 23, reproduced from the DBE presentation, shows the per learner allocations in special schools for the 2013 MTEF period. The table suggests that the per learner amount will increase over the period for all provinces. However, the numbers for the outer years (2014/15 and 2015/16) will be less reliable than those for 2013/14. For 2013/14, the amount

per learner ranges from R39,797 in Limpopo to R86,025 in Eastern Cape. Eastern Cape's expenditure per learner is thus more than double that of Limpopo, and also more than double that of Gauteng. The narrative in the presentation notes that "[u]tilisation of funding not optimal and does not ensure quality curriculum delivery and support".

Table 23: Per learner expenditure in special schools

PROVINCE	2013/14	2014/15	2015/16
Eastern Cape	86,025	89,115	91,710
Free State	67,392	65,276	66,411
Gauteng	42,061	44,746	47,285
KwaZulu-Natal	44,918	46,879	48,588
Limpopo	39,797	40,579	42,816
Mpumalanga	60,252	60,363	62,251
Northern Cape	58,263	59,796	61,989
North West	46,419	49,760	52,468
Western Cape	45,955	48,783	51,287
National average:	54,564	56,144	58,311

Source: Department of Education, 9 September 2014a

Table 24 shows enrolment of children with special needs in full-service schools. For Limpopo 17 such schools are recorded, but no enrolment. The narrative in the presentation elsewhere states that 774 public ordinary schools have been designated nationally as full-service schools. One possibility for the anomaly in the table is that the 17 schools in Limpopo have not been officially designated. The two final columns show North West and Western Cape each accounting for 19% of full-service schools, despite the fact that these are not among the largest provinces. Even more surprising is that Free State accounts for 32% of all special needs enrolment in full-service schools, despite being one of the smaller provinces population-wise. The presentation notes that Free State claims to have school-based support teams in all schools, and that this might explain the high enrolment. The claim also suggests that Free State takes this aspect of inclusive education more seriously than other provinces. The narrative in the presentation acknowledges that the rollout of full-service schools has not been as fast as was hoped.

Table 24: Full service schools special needs enrolment 2014

	FULL SERVICE SCHOOLS	SPECIAL NEEDS ENROLMENT	% DISTRIBUTION OF SCHOOLS	% DISTRIBUTION OF ENROLMENT
EC	26	2,272	3	9
FS	132	8,110	17	32
GP	74	4,310	9	17
KZN	101	4,295	13	17
LP	17		2	0
MP	140	1,471	18	6
NC	4	489	1	2
NW	150	2,546	19	10
WC	147	1,720	19	7
TOTAL	791	25,213	100	100

Source: Department of Education, 9 September 2014a

In the discussion, the DBE officials acknowledged that some “ineducable” learners were attending full-service schools. They noted that the admission policy states that special needs children must be admitted to public ordinary schools wherever possible. If the school is unable to support the child, the child should be referred to the provincial department for assessment and referral to an alternative school. However, the admission policy does not discuss special schools.

Standard provincial service delivery measures

All provinces are required to report to national DBE and National Treasury on a standard set of performance indicators (or “service delivery measures”) for each programme. Unfortunately, not all provinces include these indicators in their budget votes. Further, the standard set of performance indicators does not include any in respect of infrastructure for public special schools.

The annual reports of the provincial departments provide another source of information on service delivery measures, although these relate to past years rather than coming years. The table below shows the three standard service delivery measures for 2012/13 and 2013/14 reported in the annual reports that the DBE was able to access in responding to a special request for this information. Comparison of the information in this table and information in Table 21 above does not show a neat match.

Table 25: Standard provincial service delivery measures 2012/13-2013/14

	ACTUAL 2012/13	PLAN 2013/14	ACTUAL 2013/14
PPM401	Learners enrolled public special schools		
EC	10,099	10,401	9,206
GT	38,144	38,335	40,462
KZ	17,169		
LM	8,401	8,477	8,292
MP	3,734	3,516	3,817
NW	5,645	6,215	6,583
WC	19,884	19,470	19,876
PPM402	Educators employed public special schools		
EC	1,716	1,132	847
GT	2,942	2,971	2,864
KZ	1,556		
LM	653	747	674
MP	357	360	360
NW	574	498	599
WC	1,860	1,800	1,872
PPM403	Professional non-educators public special schools		
EC	0	10	0
GT	512	528	477
KZ	2053		
MP	16	20	20
NW	466	471	467
WC	971	997	1,003

Table 26 provides information for the same service delivery measures for the MTEF period for provinces that provide this information in their budget books. These numbers can be compared with actual performance going forward.

Table 26: Standard provincial service delivery measures, 2014/15-2016/17

	2014/15	2015/16	2016/17
PPM401	Learners enrolled public special schools		
EC	9,400	9,500	9,800
GT	40,867	41,275	41,688
LM	8,490	8,500	8,510
NC	1,668	1,670	1,675
NW	6,992	7,365	7,738
PPM402	Educators employed public special schools		
EC	1,116	1,123	1,134
GT	2,990	3,101	3,035
LM	768	768	768
NC	165	165	168
NW	623	663	702
PPM403	Professional non-educators public special schools		
GT	539	550	556
LM	18	18	18
NC	6	13	13
NW	471	512	512

In conclusion

At the portfolio committee meeting of 9 September 2014, the African National Congress's Ms J Maluleke "expressed concern that no meaningful action was yet being taken, despite the President having declared last year a 'year of action.'" At another portfolio committee in March of the previous year the DBE acknowledged that "although White Paper 6 on inclusive education dated back to 2001, there had not been nearly enough done to implement it."

The analysis above suggests that while the number of special and full-service schools, and the number of learners serviced, have increased over the years, this has not happened to the extent planned. Further, the rate of increase has slowed down over recent years. The slowdown is also reflected in budget allocations, with little if any increase in real terms for the current period after controlling for inflation. The paper also provides evidence of serious unevenness across the provinces. While some of the inequalities are inherited from the apartheid years, others are not and seem instead to reflect the extent to which a particular province takes this area of education seriously.

There are several indications that some of the special schools budget is used for purposes other than schooling for children with disabilities. For example, the budget is used for schooling in some categories of child and youth care centres as well as for home schooling. This means that the size of the allocations for schooling for children with disabilities is even less than appears in the budget votes.

Analysis of the budget votes reveals that they provide limited information on what is being done. From other sources it seems that there is, in fact, a fair amount of information available about performance of special schools and inclusive education. However, this is often not presented in the budget votes. The level of disaggregation and categories used in the budget votes also make it difficult, if not impossible, to identify the amounts spent on important areas such as LTSM, transport and training.

At the national level, the expenditure and activity relates primarily to policy making. Several guides and other types of "advisory" policy have been produced over the years. However, it seems that norms, standards and guidelines that relate more directly to the budget have not yet been produced.

Paragraph 6.4 of the draft national disability rights policy

of 2015 states that “[t]argeted programmes and services aimed at redress and/or to ensure that the diverse needs of persons with disabilities are adequately met must be underpinned by effective planning, adequate allocation of human resources and sufficient financial investment” (emphasis added). The draft policy also refers to UN-funded

research into “the cost and economics of disability, which will result in disability-responsive budgeting approach.” The analysis in this paper suggests that at this point the education budgets have some way to go before they are “disability-responsive”.

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