

# ADDRESSING LEARNER TRANSPORT ISSUES IN GAUTENG

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## 1. INTRODUCTION

The Constitution of the Republic of South Africa states that "everyone has the right to basic education". In order to take up this basic human right, learners must be able to get to and from school. Learner transport is, however, one of the areas of transport that in the past did not always receive the attention it should have received. Every weekday morning more than 10 million school children or learners throughout South Africa, of which 1,5 million are in Gauteng, are walking, cycling or transported to schools and educational institutions during peak periods, making a significant impact on the transport demands and needs, especially in our urban areas. But it is not only the effect of learner transport on the larger transportation system that is important, it is also the transportation needs and problems of the learners themselves that warrant specific attention.

The new National Land Transport Transition Act (NLTTA), that has just come into operation, requires provincial governments and certain local governments to develop strategies for the transport needs of learners. It is therefore appropriate that more attention is given to this subject at this stage.

Although the solutions to individual learner transport problems may be fairly simple, the total situation can be very complex due to all the different roleplayers, the different modes of transport and the differing circumstances throughout our country. The needs in the rural areas are very different to that in the urban areas. With Government currently focussing on the rural areas, the transport needs of learners in the rural areas warrants special attention.

The purpose of this paper is to give some background of the current situation, identify some of the important issues to be addressed, and to provide information on the process and structures adopted by the Gauteng Provincial Government. After dealing with the current learner transport subsidy policy of the Gauteng Department of Education (GDE), the paper discusses the existing policy statements and legislation dealing with learner transport, as well as some principles and departure points. Thereafter some of the issues identified at a Gauteng Provincial Conference on Learner Transport in September 2000 are discussed, and some of the institutional structures being implemented in Gauteng. The paper concludes with a few thoughts on the way forward.

## 2. BACKGROUND

Traditionally the direct funding for learner transport was provided by the education departments. Indirectly, however, many learners benefit from the government transport subsidies paid for train and bus services throughout the country. In fact more learners indirectly benefit from the transport subsidies than from the direct Department of Education subsidies, even though the government transport subsidies are primarily intended to assist workers with their daily commuting transport costs. In Gauteng, less than 5% of all the learners receive a learner transport subsidy through the Gauteng Department of Education.

A holistic approach to learner transport is necessary. On the one hand the needs of the learners and the transport service itself to the learners must be taken into account. That includes inter alia affordability, subsidies, accessibility, safety and security, type of vehicle, the time of the trip and the length of the trip. On the other hand the role and function of learner transport in the wider transportation field must be taken into account, which inter alia includes the planning process, the role of the different modes, the provision of infrastructure and transport services, and the funding of transport in general. A large portion of the total number of daily trips on the transportation network are education related and are undertaken by teachers, students, learners and parents taking learners to school. A survey undertaken recently by the previous Greater Pretoria Metropolitan Council found that nearly 50% of all daily persons trips generated per household, were education related. Transportation for learners are thus a very important and large part of the total transportation service and must receive proper attention in the policies, strategies and plans of our provinces and municipalities.

Before 1994 each education department had its own approach, criteria and funding formula for subsidising learner transport. When one education department was created in every province in 1994, the learner transport subsidy system was found to be fragmented, uncertain and underfunded. There were no structures that could co-ordinate, plan, implement or regulate such system. The MEC's for Education and for Transport then appointed a task team to undertake a study and develop a learner transport subsidy policy. A survey was conducted and several workshops held to determine needs and identify criteria. The policy developed and accepted then, is basically still in operation today.

The subsidy policy of the Gauteng Department of Education (GDE) determines that financial assistance will only be provided to learners that live more than 4 km away from any GDE school, up to a maximum of 15 km. In the urban areas of Gauteng most people have a GDE school within 4 km from their dwelling and therefore this policy applies more to the rural areas. A guideline suggesting 40% of assistance to rural schools, 40% to special schools and 20% to urban schools was also accepted. The urban portion inter alia provides for informal settlements with none or insufficient schools and other special cases where learners have to be transported quite a distance to a school.

The subsidy basis is 10c/km/pupil and the average subsidy is R45/learner/month. The average parents' contribution is R30/learner/month, which means that the average subsidy is 60% of the tariff. Parents contribute between R6 and R48 per learner per month. GDE pays out just over R12 million per year on learner transport subsidies. Investigations are from time to time done to evaluate the approach and formula. One of these investigations showed that it would cost more than R127 million to transport all learners that are currently walking to school.

The above subsidy is paid directly to service providers which are selected through a tender process at local level. Local Scholar Transport Committees (LSTCs) determine needs, invite tenders, evaluate them and make a recommendation to the GDE. Each tender contains a list of learners to be transported, the distance each one is to be transported, and a budget. The service provider claims on a monthly basis via the LSTC to the GDE. There are approximately 70 service providers currently operating in Gauteng.

### 3. POLICY AND LEGISLATION

Both the White Paper on National Transport Policy (1996) and the Gauteng White Paper on Provincial Transport Policy (1997) have as strategic objective to ensure that public transport services address user needs, including those of commuters, pensioners, the aged, scholars, the disabled, tourists and long distance passengers. The Gauteng White Paper further has a policy statement that "The Department will develop, in collaboration with the Gauteng Department of Education an urban and rural transport strategy in order to meet the needs of scholars in the province". The Gauteng White Paper also states that the Department will liaise with other departments regarding the demand and supply of social transport services such as scholars, patients, pensioners and persons with disabilities.

The other national policy document, Moving South Africa, the Action Agenda, states that mainstream urban public transport operations will meet the needs of currently marginalised users, including, inter alia, scholars.

The National Land Transport Transition Act (NLTTA) has quite a number of important provisions on learner transport:

- The NLTTA classifies the conveyance of learners to and from school or other educational institutions on a daily basis, as public transport. That means that all the sections in the Act referring to public transport, also refers to learner transport.
- In the definitions of the Act, learners are grouped under "special categories of passengers" together with other groups such as persons with disabilities and the aged.
- One of the principles for national land transport policy is: "The needs of special categories of passengers must be considered in planning and providing public transport infrastructure, facilities and services, and these needs should be met as far as may be possible by the system provided for the mainstream public transport". This is an important principle with regard to a holistic approach to public transport.
- The Act further requires the MEC to ensure co-ordination of the planning of all planning authorities under the jurisdiction of the province and, in so doing, ensure that all plans address, inter alia, "the needs of special categories of passengers".
- The Act also requires that strategies for the needs of learners must be developed on both provincial and local government level. On provincial level the Provincial Land Transport Framework (PLTF) "must set out a general strategy for the needs of learners and persons with disabilities". At the local level a Public Transport Plan (PTP) must be prepared by every transport authority and core city, and every municipality required to do so by the MEC. Such a PTP must contain "the planning authority's strategies for the needs of learners and persons with disabilities".

Gautrans is currently busy developing a PLTF and although this one may not include a strategy for the transport of learners, future ones will do so. The intention is to develop such a strategy during this coming year so that it can then be included in the next PLTF to be updated next year. By next year all municipalities which must prepare PTP's, will hopefully be ready to do so and then a provincial learner transport strategy should be ready to give guidance to the municipal learner transport strategies. What is, however, important, is that the development of a provincial learner transport strategy should be done in consultation with all roleplayers.

- The NLTTA also determines that requirements be laid down for each of the plans required in the Act, and therefore also for a PLTF and a PTP. These requirements are currently being developed and should be in operation by the middle of 2001 or very soon thereafter. In the case of the PTP, the requirements states what type of information should be given in a learner transport strategy, including matters such as the status quo, objectives to be achieved, the proposed strategy and implementation plans.

The proposed Gauteng Public Passenger Land Transport Bill, currently at the Gauteng Legislature for consideration talks about an education service and includes the following clauses:

- Education services must be scheduled for the conveyance of learners, students, pre-school children, and supervisors between their places of residence and education, but may include unscheduled trips from and to the educational institution in question if these are concerned exclusively with education-related activities.
- Education services may be provided by motor cars, minibuses, midi-buses, standard buses, double decker buses, bus trains or an appropriate vehicle.
- Before considering an application for the granting, renewal, amendment or transfer of an operating licence for education services, the Board must submit the application to both the relevant school or other educational institution, as well as the relevant local authority in who's jurisdiction area the school is located, for comments and recommendations, and must consider any such comments and recommendation that are received.

#### **4. DIFFERENT ROLEPLAYERS**

The different roleplayers with regard to learner transport need to be given the necessary recognition and should be consulted as far as possible, also with the development of a provincial learner transport strategy. These roleplayers include the following:

- The Gauteng Department of Transport and Public Works
- The Gauteng Department of Education
- Local government in the province
- Local Scholar Transport Committees
- Schools, urban and rural, School Boards, farm schools, special schools, and other educational institutions
- Operators, urban and rural, including Metrorail, bus companies (learner, formal and informal), minibus-taxi (learner and general), other.  
Preferably operators should be represented by representative associations. The minibus-taxis used exclusively for learner transport have now organised themselves

into metropolitan associations with a constitution, which makes communication and consultation so much easier.

- Other bodies such as SARCC, SABOA, SACO, other.

## **5. SOME PRINCIPLES AND DEPARTURE POINTS**

When developing a strategy and considering the introduction of services, the following principles and/or departure points should be kept in mind:

- Sectoral integrated co-ordinated planning must occur between and within departments so that schools are located conveniently with regard to the areas they serve, in order to minimise travel.
- Learner transport should be affordable to the learner/parents, and where subsidised, affordable to the government. Financing and funding is an important issue.
- Learner transport must first of all address user needs, namely the needs of the learners, parents and schools. The focus should, therefore, be on the learner, not the mode.
- The service must be accessible to the learner. Appropriate levels of accessibility and mobility are important.
- The service must pick up the learner at a reasonable time and get the learner to school at a reasonable time. The length of the trip is also relevant.
- In urban areas where normal public transport is used, the frequency is also of importance.
- Safety and security is critical. This also means that the type of vehicle used, must be legal, roadworthy and safe. The security of the learners on the vehicle must be controlled and of a sufficient standard.
- Comfort is considered important and a minimum level of comfort is necessary to ensure that children are ready for school when they get there.
- The system and service must be reliable, effective and efficient.
- The system should be based on regulated competition for a route or network. It should encourage a professional approach to the management and operation of the service. Preference should be given to SMME and PDI operators when evaluating tenders.
- Readily accessible information on the services should be available to existing and potential users.
- Institutional structures should be created to ensure efficient planning, implementation, funding, regulation and law enforcement, participation, co-ordination and consultation by all relevant roleplayers.
- Quality control and monitoring is also necessary.
- A social and a quality charter should be developed for scholar transport.

The above are only a few of the principles and departure points that should be considered.

## **6. THE NEED FOR SURVEYS**

Generally there is a lack of information on the existing situation with regard to learner transport both at the metropolitan/municipal level and on a provincial wide basis. It is, therefore, difficult to get a clear picture of the status quo of learner transport. Surveys to obtain the necessary information, should therefore be undertaken.

Information can be obtained from a variety of sources:

- The Department of Education can provide information on the current subsidised services, including the schools served, the contractors, number of children per contract, travel distances, costs, information on origin, etc.
- Operators in the urban environment should have information on the learners they transport.
- Transportation studies may have information on education-related trips, such as the number of trips per household, mode of travel, travel times and relevant origin-destination information.
- Surveys can be considered at termini, ranks, bus stops, stations and on board vehicles.
- Surveys should also be considered at the schools, with the approval of and assistance of the Department of Education. The following information could be of value
  - Mode of transport used for the trip to and from school, distance, travel time, cost, time of trip, etc.
  - Alternative modes available
  - Origin/destination
  - Household information, e.g. average household income and number of learners in household.

## 7. IMPORTANT LEARNER TRANSPORT ISSUES

A Gauteng Provincial Learner Transport Conference was held in September 2000 in Johannesburg. The conference identified some of the key areas and the most important issues in learner transport in the Province at the moment.

- **Vision, mission, objectives, policy framework**  
*(What are the broad goals to be achieved and how is it aligned with the White Paper and other government policies.)*
- **Regulation (formalisation and legalisation)**  
Ensure that all services are legalised - that they have the necessary operating licenses.  
*(Discussions with Permit Board. Make an estimation (survey?) on what percentage is legal. Work out a strategy to provide opportunity for balance to legalise and implement.)*
- **Types of vehicles used for scholar transport**
  - Obtain clarification on the type of appropriate vehicles which currently qualify to transport scholars, and what are the road safety and other standards they should comply with.
  - Determine the minimum standards for scholar transport vehicles, e.g. with regard to comfort and seating, so that children, when they arrive at school, are ready for school.
  - Confirm whether long term goal is to ultimately only use recapitalised vehicles for scholar transport in Gauteng (i.e. new 18 and 35 seater vehicles)

- Assist those who do not qualify for an operating license because of the type of vehicle, to, where possible, obtain proper vehicles.  
*(First determine which vehicles are legal and which are not. Look at ways to assist non-compliant vehicles to comply. Investigate other ways to provide assistance.)*
- Assist scholar transport owners/operators to qualify for and obtain recapitalised vehicles.

- **Institutional, including Roles and Functions**

- ***At Provincial level***

- Establish inter-provincial communication and co-operation on cross-border scholar transport issues. Resolve responsibilities, also i.t.o. subsidies.
- Closer co-operation and co-ordination between the Department of Transport, the Department of Education and the Department of Development, Planning and Local Government is necessary. The existing co-ordinating (inter-departmental) structure between the first two departments must be formalised and extended.

- **At local level**

- a) Synchronisation, co-ordination, co-operation and communication is necessary at local level and clear guidelines must be provided for such co-operation
    - between the regional offices of the Departments of Transport and Education ,
    - with local government,
    - with all other relevant stakeholders/roleplayers on local level.
  - b) Co-ordination and advisory bodies to investigate local problems and advise the Operating License (permit) Boards on applications. This should probably be on metropolitan level.
- Appropriate institutions must be developed for the scholar transport industry, e.g. learner transport associations.

- **Financing - Subsidies**

- ***With regard to the scholar transport subsidy formula of the Department of Education***

- a) Investigates whether provision should not be made for an escalation clause due to, e.g. increases in the petrol price.
- b) With regard to rural environments, investigate whether an increase in subsidies is appropriate, i.e. that higher subsidies be paid than in urban environments.
- c) Investigate whether the subsidy should be means-tested and need-based, taking supply/demand into account.
- d) Determine appropriate measures to means-test the subsidy, based on household income.

- Investigate whether schools should be included in the current public transport subsidy system of the Department of Transport.

- **Tendered contracts**

- Investigate the tendering process to ensure that the principles of open, fair and transparent competitive tendering is applied.
- Tenders should be advertised.
- The conditions and terms of the contract must be clarified and standardised, and extended, if necessary.
- Overcome difficulties with regard to SMME's and PDI's and allow for joint ventures.

- **Road safety and insurance**

- Safety - Road safety related matters should be given priority, including the
  - operator/driver
  - learner
  - vehicle lifespan
  - reliability.
- Public Liability insurance should be mandatory.

- **Land use planning and LDO's.**

Forward planning and co-ordination with regard to new school and services, including public transport, and time frames, are necessary.

- **Roads in rural areas**

- Gautrans and local government to identify scholar transport routes and determine their condition and needs.
- Gautrans and local government to give priority to and improve these routes.

- **Farm schools**

Increased government involvement in farm schools must include access to the schools (i.e. scholar transport)

- **Special schools**

- Multi-functional, specially equipped vehicles should be made available where possible
- It should be recognised that the feeder areas are very big with large travel distances.



## **8. INSTITUTIONAL AND CONSULTATIVE STRUCTURES**

Before the above-mentioned conference, an inter-departmental committee between the Gauteng Departments of Transport and Public Works and of Education existed. This Committee has since then been expanded to also include local government in the Province. This Committee now serves as a Provincial Learner Transport Committee. The current terms of reference of the Committee also allows for a sub-committee of operators to be created.

At national level MINCOM and COTO should form the basis for any permanent or ad-hoc structures to discuss learner transport on a national level.

The involvement of the national Department of Education is also important. A while ago support was given by LTCC (at that time a committee of COLTO) for holding a national conference or workshop on learner transport. It was, however, felt that before a national conference is held, it would be advisable to hold provincial conferences or workshops so that each province could first identify its own needs and problems. The time has probably now come to hold the national conference, especially in the light of the new requirements of the NLTTA with regard to provincial and municipal strategies on learner transport.

It is important that consideration be given to the establishment of suitable institutional structures on local government level for learner transport. In Gauteng the regional education districts boundaries and the local government boundaries may form a basis for such co-ordination.

As operating licences for learner transport services must be issued by the Provincial Operating Licences Board (Permit Board), it is important that a suitable structure on local government level advise the Board on whether the application for a licence should be approved or not, and if approved, under what conditions. Schools should make an input, but as the service should be part of a wider integrated transportation system, it is important that an input is also made from a wider local government perspective.

## **9. THE WAY FORWARD**

From the limited information currently available, it is clear that much work still needs to be done to ensure that learner transport in the Province has its rightful place within the total transport system and that the needs of learner transport have been identified and are being addressed. The development of provincial and local government learner transport strategies would make a big contribution in that regard.

More comprehensive surveys may be necessary to ensure that the right information is used to plan future services as part of the total transportation system.

A national conference on learner transport would assist to give all the different roleplayers from throughout South Africa an opportunity not only to express their views, but also to learn from each other.

The education of our children is critical for the future of our country, and proper transport to and from educational institutions is a necessary pre-requisite for an effective educational system.

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