

Response to Bernstein article

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I was asked to express an opinion on a part of an article by Ann Bernstein titled ‘South Africa’s challenges: tough choices and new directions’, published in 2014². The part of the article I was asked to focus on is the part dealing with education (pp. 20-45).

My assessment of Bernstein’s text that follows focuses in particular on whether her text provides a good basis for arguing that the South African government is not governing the basic education sector as it should.

I will argue that the article does not provide such a basis for three main reasons. Firstly, in criticising the government’s policies on education, the article argues that to a fairly large degree the problem lies in the government’s fundamental philosophies and assumptions, in particular the government’s view on the role of the public and private sectors in national development. One would expect the current government, which is elected within a democratic system, to work within its ideological framework. The article would thus serve as a potentially useful basis for arguing that voters should not vote for the African National Congress (ANC) or that the ANC should fundamentally change its philosophy, not just with respect to education. But the rather political and ideological nature of the article limits its utility as a basis for critiquing or reforming the basic education policies of the government, given its fundamental ideological positions.

Secondly, the article, in arguing for a greater role for the private sector and for more competition in the sector, over-simplifies the link between policy reform and better educational outcomes. Many of the caveats for the reforms proposed in article, caveats which are commonly expressed in the general literature on these topics, are ignored in Bernstein’s article. This is perhaps understandable given the rather political and ideological nature of the article. I should emphasise that I believe that the reforms discussed within Bernstein’s article are reforms worthy of serious debate in South Africa. However, what is optimal for South Africa in the current context is a far more complex matter than what the article makes it out to be.

Thirdly, there are a few factual errors and misrepresentations which detract from the credibility of the article.

Let me deal with my three points one by one.

The fact that the article is judging the current government against an ideological framework which is in many ways not government’s framework is relatively easy to establish. Bernstein heads the Centre for Development and Enterprise (CDE), which is clear in its emphasis on ‘the role of business and markets in development’³. One can safely consider the CDE to be to the right of the ANC in the political spectrum. The article argues that ‘Tough choices must be made ... about allowing the private sector and competition to play a greater and more effective role in education delivery’ (p. 44). This matter is one that is debated much amongst education policy experts. It is by no means a given that a greater role for the private sector, for instance, is an optimal path to improve educational outcomes in contexts such as the South

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² Bernstein, 2014.

³ From <http://www.cde.org.za>.

African one. Even international organisations which in general would share the CDEs pro-market policy outlook are in many instances not strong advocates of the solutions proposed by Bernstein. For instance, in a major 2008 review of South Africa's education sector by the Organisation for Economic Co-operation and Development (OECD), a greater role for private schools was not amongst the key recommendations made⁴. The political emphasis in the article is clear in the conclusion, where it is argued: 'The departure from current practice will need to be supported by the development of a new political coalition around these goals and by the breaking up of the ruling tripartite alliance – which no longer makes any sense...' (p. 44). Had the article been more technical and less political in nature, for instance had the article assessed government's performance in the education sector against its own broad policy frameworks, in particular against the National Development Plan released in 2012, the article would have stood a better chance of serving as a useful critique of the performance of the government.

My second point is essentially that the article fails to appreciate complexities and risks. It is all very well to promote particular policy positions, but if this is not done with sufficient acknowledgement of our current knowledge gaps and of political and historical realities, then the utility of any argument is reduced, partly because the argument is then seen to be too ideological and not sufficiently practical. Let me point to some examples of problems in this regard within the article.

The article points to the positive role that private schools have played in providing schooling to poorer communities in developing countries such as India, Colombia and Kenya. What is not explained is that these were countries where large areas had no schools and private schools filled an absolute gap in service delivery. This is a very different context to that of South Africa currently, where public schools are available to communities for virtually the entire population, and the problem is more one of quality than quantity. This difference, combined with the fact that existing public schools are characterised by strong union membership, create dynamics which must be thought through with great care.

A key argument in the article is that government is imposing too much red tape on publicly subsidised private schools and that this bureaucratic burden should be eased. However, the article itself does not provide specifics, but instead refers (p. 40) to a CDE report titled *Promoting school choice for the poor: Practical ideas from international experience*. That report is also thin on detail. It argues, for instance, that a key barrier for private schools is the fact that they must perform 'detailed annual reporting, adherence to a management check-list and submission of audited financial statements' (p. 8 of the CDE report). At face value, these seem like reasonable procedures in exchange for public funding. It may be true that private schools experience an excess of red tape, but for this to be put forward as a compelling critique of government's policies, more detail is needed. In contrast, the argument that there are serious delays in the payment of subsidies to private schools, is supported by more credible and detailed evidence within Bernstein's article and her references.

It is a common mistake to believe that the difference between public and private schools is clear-cut, and then to assume that the relationship between the public-private distinction, on the one hand, and educational outcomes, on the other, works in a similar way in different country contexts. Public schools can be made to operate in more private sector-like ways through incentive systems that promote competition, whilst private schools can end up operating in rather public-like ways, depending on the conditions attached to the public funding received by private schools. Bernstein's article seems to be based on the premise that there is no sense of competition at all within South Africa's public schools:

⁴ OECD, 2008: 367.

If dissatisfied parents had the option of removing their children from public schools and enrolling them in low-fee private schools, it would act as a powerful incentive to principals and teachers in state schools to improve performance or face job losses – as long as state schools face financial and other penalties when parents vote with their feet by taking their children out. (p. 40)

As Bernstein herself argues elsewhere in the article, parents are indeed in some instances ‘voting with their feet’ and placing their children in low-fee private schools. Moreover, public schools do face financial losses when they lose pupils. As anyone familiar with South Africa’s school funding system would know, financial transfers, the provisioning of teaching posts and even school principal salaries are directly linked to enrolments. It is also clear that between public schools there is considerable competition if one considers that 17% of South Africa’s pupils are enrolled in a school that is not the closest school, largely because parents are concerned about school quality⁵. Any argument around the possible benefits of increasing the role of the private (or independent) school sector needs to be based on a clear understanding of the incentives faced by public schools, and should weigh up the benefits of a larger private sector against the benefits of, for instance, more of the right kind of competition in the public school sector.

One pitfall associated with having a large private school sector alongside the public school sector is greater levels of inequity in education outcomes. There is compelling evidence of this in the case of Chile⁶. It is important to deal explicitly with these risks in the private versus public school policy debates.

Finally, the article includes a few factual inaccuracies, all of which bias the article in favour of Bernstein’s policy positions. South Africa has never performed worse than Lesotho in any international testing programme, and performed considerably better than Mozambique in the most recent SACMEQ⁷ tests of 2007. Bernstein states that South Africa performs worse than both these countries, yet the relevant data are widely available.

Bernstein’s article creates the impression that the public schooling sector is shrinking and that the private schooling sector is expanding to a much larger degree than what is reflected in official statistics. It is ingenuous to attach much significance, as Bernstein does (p. 39), to the 9% decline in the number of public ordinary schools between 2000 and 2010. This decline largely reflects the merging of small schools. The same official reports of government which Bernstein would have used also indicate that the total enrolment in public ordinary schools increased slightly between 2000 and 2010, by 1.3%. On the other hand, the suggestion that six out of every seven private schools are not reflected in the official statistics is not credible (p. 39). Whilst it is believable that in the six geographical areas on which the CDE’s researchers focussed, 30% of schools were found to be private, it must be remembered that the CDE specifically selected areas which appeared to have a strong presence of private schools, something Bernstein does not acknowledge in her article. The fairly radical suggestions made by the CDE in relation to the size of the unaccounted for private school sector in South Africa is something I looked into in some depth in a 2012 paper⁸. I concluded, using school census and household survey data, that whilst some private schools could be missing in the official statistics, non-coverage could not be nearly as high as six of every seven schools. Of course the CDE has not explicitly said that six out of seven schools are not covered, but the way the CDE has repeatedly presented its information suggests this is what it would like people to conclude.

⁵ Gustafsson, 2011: 23.

⁶ McEwan, Urquiola and Vegas, 2008.

⁷ Southern and Eastern Africa Consortium for Monitoring Educational Quality.

⁸ Gustafsson, 2012.

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