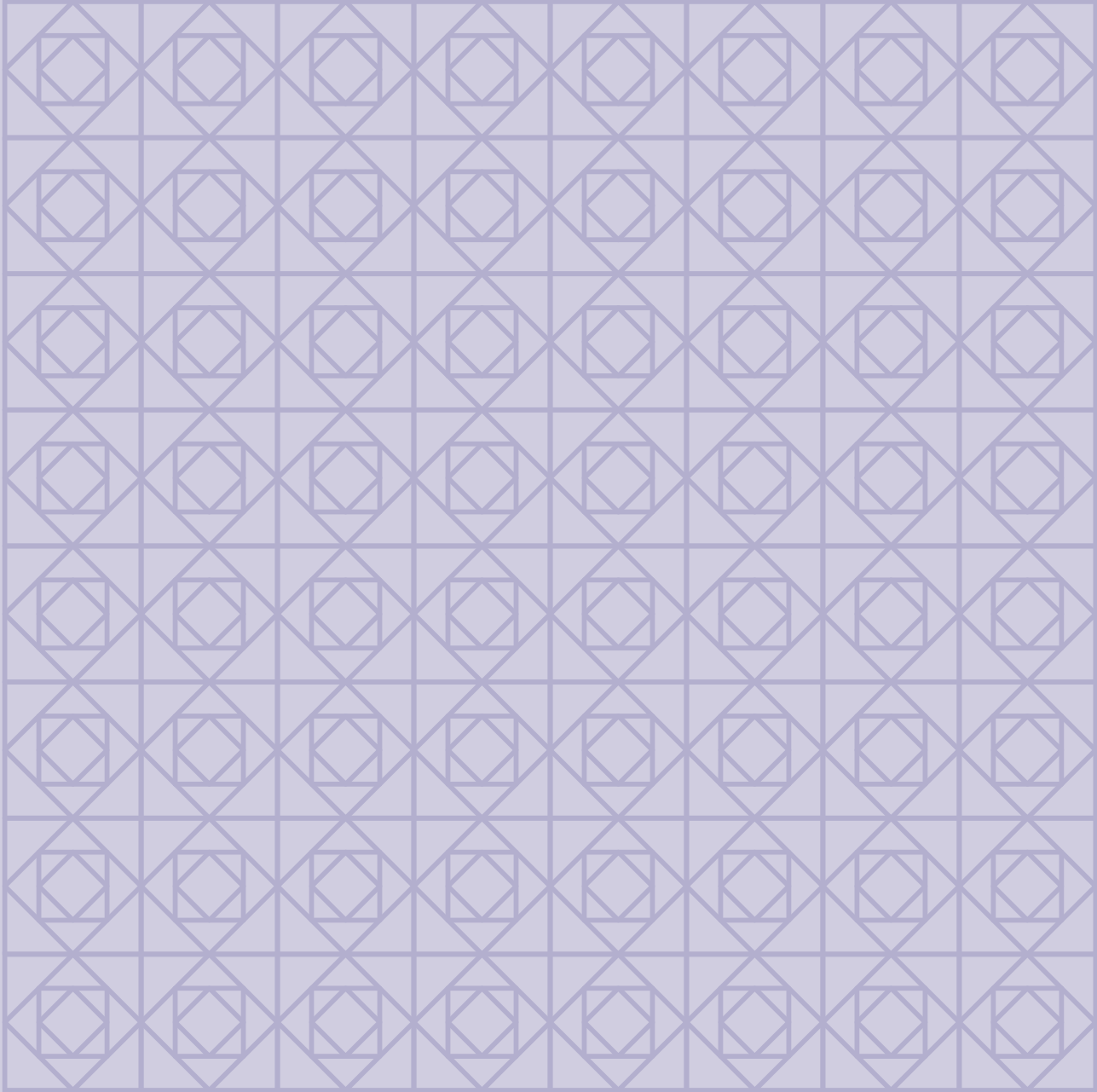


Gaps, Capacity, and Displacement: Understanding Grade R Provision in South Africa

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Summary

With the enactment of the Basic Education Laws Amendment Act (BELA), Grade R is now compulsory. Yet by 2024, Grade R participation rates were already approaching universal coverage, suggesting that the legislation is unlikely to increase overall participation substantially. Data from the 2022 South African Systemic Evaluation (SASE) indicate that approximately 92% of Grade 3 and Grade 6 learners had attended Grade R, implying that participation rates were already high by 2016.

The more consequential policy shift is that compulsory Grade R is now explicitly located within schools, marking a departure from the mixed model of Grade R provision originally envisaged in Education White Paper 5. The expansion of school-based Grade R will significantly displace children attending Grade R in early learning programmes (ELPs), particularly programmes unable to register as schools.

This paper uses a combination of administrative school data, SASE student survey data, and ELP data from the Thrive by Five Index 2024 to estimate the scale and distribution of Grade R enrolment outside the school system. These estimates indicate:

- the potential magnitude of Grade R displacement from ELPs to schools;
- where this displacement is most likely to occur; and
- the potential financial implications for the ELP system.

Nationally, we estimate that about 123,000 (13%) of first-time Grade 1 learners in public and independent schools in 2024 may have attended Grade R in ELPs, equivalent to about 61% of the estimated shortfall of 201,000 Grade R places in schools.

Roughly 78,000 first-time Grade 1 learners in 2024 were not accommodated in Grade R in schools (public or independent) or in ELPs, representing 8% of the first-time 2024 Grade 1 cohort. This group should be the focus of policy interventions, rather than the 201,000 (21%) of first-time 2024 Grade 1 learners who did not attend Grade R in a school. For first-time Grade 1 learners entering public schools in 2024, approximately 99,000 (11%) had attended Grade R in ELPs, which represents around 54% of the estimated shortfall of 181,000 Grade R places for the first-time Grade 1 cohort in public schools.

The impact of compulsory school-based Grade R is likely to be concentrated among ELPs serving middle- to upper-income communities, particularly in Gauteng province, where more than half of non-school-based Grade R enrolment has been among middle- and upper-income learners. In absolute terms, approximately 66,000 learners in Quintile 4 and Quintile 5 schools attended non-school-based Grade R, of whom roughly 35,000 were in Gauteng. By contrast, nationally, fewer than 37,000 Grade 1 learners in Quintile 1–3 schools attended Grade R outside schools.

The Thrive by Five Index 2024, which included a nationally and provincially representative sample of ELPs, also provides some clues about which ELPs are most at risk of Grade R displacement. Across ELPs in South Africa, about 27% of principals reported that their programme had Grade R classes. Annual income from user fees and ECD subsidies to these ELPs, if they accommodate 123,000 Grade R learners per year, could be as much as R1.3 billion. However, among those ELPs with Grade R classes, only 48% had registered these classes with the Department of Basic Education (DBE), according to the Thrive by Five Index 2024. Nationally, approximately 14% of ELPs offer Grade R classes but are not registered with the DBE. These programmes are likely to be most at risk of Grade R enrolment displacement arising from the 2024 BELA provisions and could lose approximately R500 million a year in Grade R-related user fees and ECD subsidies.

The vast majority – at least 85% – of the unmet Grade R supply in schools cannot be addressed simply by extending provision to schools that do not currently offer it. Instead, it would need to be met through expansion within schools that already provide Grade R and continued reliance on non-school-based ELPs that register as independent schools.

As Grade R in ELPs largely occurs in relatively better-resourced settings, these ELPs may be reasonably well positioned to transition into formally registered school provision if appropriately supported by provincial education departments. However, this means provinces will have to spend scarce administrative time registering middle-class ELPs as schools, diverting efforts from the more pressing need to expand Grade R in marginalised communities where real supply and access constraints exist.

Keywords: early learning programmes (ELP), Grade R provision, Basic Education Laws Amendment Act (BELA), early childhood development (ECD), South Africa schooling policy

1. Introduction

South Africa’s move to make Grade R compulsory marks a significant policy shift in the expansion of early childhood education within the formal school system. With the enactment of the Basic Education Laws Amendment Act (BELA), attendance in Grade R in the year a child turns

six is now mandatory. In 2024, when Grade R was made compulsory, enrolment was already widespread, so the introduction of compulsory Grade R would not significantly increase Grade R participation rates. What constitutes a major change for the system is that compulsory Grade R provision is now explicitly located within schools (Basic Education Laws Amendment Act 32 of 2024, 2024, Section 3).

Amendment of section 3 of Act 84 of 1996

2. Section 3 of the South African Schools Act, 1996, is hereby amended—
(a) by the substitution for subsection (1) of the following subsection: 50
“(1) Subject to *this Act* and any applicable provincial law, every parent must cause every learner for whom he or she is responsible to attend [a] school, [from] starting from grade R on the first school day of the year in which such learner reaches the age of [seven] six years and not leaving school until the last school day of the year in which such learner reaches the age of [fifteen] 15 years or [the ninth] will complete grade nine, whichever occurs first.” 55

This regulation takes place within a highly differentiated early learning system in which Grade R provision is shared among public schools, private schools (referred to as independent schools), and a diverse set of early learning programmes (ELPs).¹

Although ELPs are often formally registered as ECD providers, this does not mean they are registered as schools. Requiring compulsory Grade R to take place in schools fails to account for the significant – yet unclear – number of children who attend Grade R outside the school system. As a result, the legal introduction of compulsory, school-based Grade R raises important questions about how enrolment will shift across providers and the financial implications for ELPs. Although this issue has been noted in media reports (Metelerkamp, 2026a), analysis is needed to ascertain the contexts in which this is likely to occur.

In the literature, this issue is referred to as “crowding out”, whereby the expansion of publicly provided Grade R displaces children from ELPs – particularly ELPs unable to register as schools – rather than increasing overall participation. This has occurred in other countries and regions where free or compulsory state provision of pre-school has been introduced (Bassok et al., 2014, 2016; Brinkman et al., 2017), with parents substituting privately funded early childhood care and education (ECCE) with public ‘free’ options.

This has implications for the financial sustainability of ELPs. Many depend on enrolment-linked revenue streams, and because in some cases Grade R learners are often among the more financially viable cohorts within ELPs (due to higher child-to-practitioner ratios among 4–5-year-olds compared

with younger children), their displacement could potentially undermine the user-fee cross-subsidisation that supports provision for younger children.

However, this risk is mitigated if non-school-based Grade R provision is concentrated among relatively wealthier households, as the better-resourced ELPs serving these populations may be better placed to register as independent schools than their less-resourced counterparts.

Adding to these issues, both Grade R and the expansion of early learning through ELPs face funding constraints. The implementation of BELA in 2024 did not include funding for provincial governments, while efforts continue to secure additional funding to expand access to quality ELPs. Provincial education departments (PEDs) have been required to reprioritise resources within their existing budgets to support the shift to compulsory Grade R. This requires major expenditure on classrooms, sanitation, furniture, educators’ salaries, and practitioner upskilling – an especially difficult requirement when PEDs are under pressure from prolonged fiscal consolidation.

Where there are existing supply constraints in the public school system that limit its capacity to accommodate Grade R learners, providing independent school registration support to ELPs offering quality Grade R programmes becomes important in meeting obligations for school-based Grade R provision. Data limitations currently preclude a direct assessment of the extent of displacement of non-school-based Grade R provision that has occurred in ELPs following the signing of BELA in 2024. While the school system has long benefitted from a comprehensive electronic administrative data system

for enrolments, equivalent systems for ELPs are under development. Without integrated data across the school and early learning sectors, visibility into the extent and distribution of Grade R provision outside schools has been limited.

A key contribution of this paper is to estimate non-school-based Grade R enrolment and how it varies across provinces and socio-economic contexts. These estimates provide an upper bound² on the potential scale of displacement, indicate where effects could be most concentrated, and assess how likely this is based on patterns of Grade R provision. We also provide estimates of the financial implications for the ELP sector, although more detailed research should be done with cost and income data collected from ELPs.

The analysis is situated within a broader descriptive account of school-based Grade R enrolment, including an assessment of the number of children not currently accommodated in school-based Grade R. In doing so, the paper extends earlier research on Grade R provision (Gustafsson, 2024; van der Berg et al., 2013; Van der Berg et al., 2025), contextualising gaps in public provision of Grade R, as well as the role of independent schools and ELPs in filling these gaps.

The core empirical analysis examines the level and distribution of Grade R enrolment across school- and non-school-based providers, drawing on a combination of administrative school enrolment data and sample-based survey data on Grade R attendance from SASE. Building on this descriptive evidence, the paper considers the implications of compulsory Grade R for the structure of early learning provision in South Africa.

The following questions guide the analysis:

- How has school-based Grade R enrolment evolved, and how has enrolment growth varied across periods and provinces?
- How many children are not currently accommodated in schools³ in Grade R, and how does this vary by province and school quintile?
- To what extent could adding Grade R to schools that have Grade 1–3 enrolments but no Grade R learners help to fill a gap in school-based provision?
- How many children are enrolled in non-school-based Grade R, and in which provinces and socio-economic contexts is this provision concentrated?
- What are the financial implications for ELPs – in terms of lost user fees and ELP subsidies – from losing Grade R learners?

2. Literature and policy context

Global policy trends in compulsory pre-primary education

It is useful to situate South Africa's recent promulgation of compulsory Grade R, as set out in the Basic Education Laws Amendment Act, within global trends in pre-primary education policy.

The introduction of free and compulsory pre-primary education is a relatively recent global development, concentrated largely in the period since 2000. While participation in pre-primary education has expanded significantly worldwide (Wotipka et al., 2017), the adoption of legal provisions mandating attendance remains limited. This is reflected in UNESCO's (2021) comparative analysis⁴ of national legal frameworks for free and/or compulsory pre-primary education across 193 countries. By 2019, only 51 countries had legislation providing compulsory pre-primary education, and just 46 countries combined both free and compulsory provision (UNESCO, 2021, p. 29). Among 57 upper-middle-income countries, only a third (20) had adopted compulsory pre-primary policies, while across 47 African countries, just four⁵ had done so (UNESCO, 2021, p. 24,51).

Introducing a compulsory Grade R year can help reduce early entry into Grade 1 and the high repetition costs associated with it (Crouch et al., 2022). In countries where compulsory pre-primary has been introduced, it is typically confined to the single year preceding entry into formal schooling. Across the 193 countries included in the UNESCO (2021, p. 27) report, only 11% provide more than a year of free and compulsory pre-primary education. In this respect, South Africa's move toward universalising Grade R aligns with international trends, but extending compulsory provisions to a pre-Grade R year would be out of line with prevailing global norms and expectations, even in higher-income countries.

One challenge identified in the introduction of pre-primary policy frameworks is a lack of internal coherence. Legal provisions, policy objectives, and implementation strategies are often misaligned, and in some cases, contradictory (UNESCO, 2021). Furthermore, the expansion of compulsory pre-primary education can have unintended consequences, including pressures on quality and shifts in the structure of provision.

These insights are directly relevant to the South African context. While recent policy developments emphasise both

the expansion of school-based Grade R and the continued growth in attendance at ELPs, the relationship between these objectives is not clearly resolved. In particular, the requirement that Grade R be delivered within schools may sit in tension with the historical and ongoing role of ELPs in providing early learning services and potentially with strategies to expand access to early learning for children under the age of 5 years.

Against this backdrop, this paper reflects on the extent to which South Africa's policy framework may generate such system-level tensions and how these might be mitigated.

Crowding out in early childhood education systems: An international perspective

Proponents of universal pre-primary education argue that guaranteeing early learning – for example, through free and compulsory pre-primary – can reduce inequalities in early development and improve long-term child outcomes (Dabrowski et al., 2026). In parallel, a comparatively smaller literature considers how universal public provision of early childhood education may replace private spending on preschool and displace existing private providers from the early childhood education and care market (Bassok et al., 2014, 2016; Brinkman et al., 2017; Cascio & Schanzenbach, 2013). This is a significant issue in early childhood education, where private provision typically plays a much larger role than in later stages of schooling (OECD, 2023).⁶

Studies suggest that the expansion of public provision can lead not only to shifts in enrolments between public and private providers, but also to changes in the allocation of services or enrolments across age groups within the childcare market (Bassok et al., 2014, 2016; Cascio & Schanzenbach, 2013).

While an accurate examination of crowding-out effects in South Africa is not feasible due to data limitations, getting a clearer picture of current Grade R enrolment patterns could support a better understanding of the implications of compulsory Grade R in South Africa.

Particularly important is the size and composition of the population currently enrolled in non-school-based Grade R. Previous World Bank estimates suggest that around 28% of all Grade R learners – representing about 100,000 children – attended Grade R in ELPs (World Bank Group, 2022). This group represents the upper bound of potential displacement under a policy that requires Grade R attendance in schools.

The extent of Grade R displacement is likely to vary geographically and socio-economically, depending on the distribution of ELPs and the availability of school-based provision. Broader crowding-out effects will also depend on how user fees, subsidisation, and Grade R practitioner salaries respond to compulsory Grade R legislation.

The South African Grade R policy context

South Africa's approach to Grade R has historically recognised the role of public and non-state providers. Education White Paper 5 of 2001 proposed a universal access model that incorporated a mixed system of provision, under which government would subsidise a reception year (Grade R) through a combination of school and community-based sites. The plan was to subsidise a reception year in schools at 70% of the cost of Grade 1, with Grade R enrolment in schools envisaged at 800,000 by 2010, and to subsidise a reception year in community-based centres, increasing their Grade R enrolments to a fixed level of 135,000 by 2003, accommodating roughly 15% of a cohort (Department of Education, 2001).

Importantly, this framework explicitly did not intend to displace Grade R in the early childhood development (ECD) sector, but to support and integrate it. It acknowledged that Grade R at ECD sites was far less costly for government, although it placed a fee burden on parents (patterns confirmed in a more recent public expenditure review by the World Bank, 2022).

Following the National ECD Pilot Project, it was proposed that some community-based sites become part of the public system for the provision of the reception year where public primary school options were not available. Furthermore, section 4.2.2.9 of Education White Paper 5 stated that “it is not expected that the subsidy to the reception year in public schools would crowd out community and home-based provision” and that “it would be undesirable if the effect of a subsidy were to simply substitute public for private funding”.

The Education White Paper 5 also highlighted the importance of quality, requiring “that all reception year programmes be registered with provincial departments of education, that accredited reception year educators be registered with the South African Council of Educators and educators, who do not have a specialised qualification to teach the reception year, undergo approved training programmes” (Department of Education, 2001).

The proposals in Education White Paper 5 were also clear about affordability, and the Grade R provision model was developed with affordability in mind, aiming to benefit from a ‘dividend’ related to slowing population growth.

Over time, policy has generally shifted toward greater government involvement in early learning. The recognition of early childhood education as a public good has strengthened the case for expanded provision, supported through ELP registration drives, improved budget allocations for ECD subsidies and more oversight of ELPs by the Department of Basic Education.

However, the introduction of the National Norms and Standards for Grade R Funding in 2008 represented a departure from a system of three Grade R options – in public schools, independent schools, and community-based centres – to just two options – public and independent schools (Department of Education, 2008).

The introduction of compulsory Grade R through BELA represents a further step in this direction, concretising the departure from an initial position that community-based sites play a key role in Grade R provision. By requiring Grade R attendance explicitly within schools, BELA creates tension with the historically mixed model of provision. The new requirement implies that unless ELPs are registered as schools, they cannot offer Grade R. Sending a child to Grade R at an ELP not registered as a school would technically be illegal⁷ (South African Schools Act 84, as amended, 1996).

In BELA, the onus also falls on government to ensure there are sufficient Grade R places in schools. “Every Member of the Executive Council must ensure that there are enough school places so that every child who lives in his or her province can attend school as required...” and “must take steps to remedy any such lack of capacity as soon as possible and must make an annual report to the Minister on the progress achieved in doing so” (South African Schools Act 84, as amended 1996).

One approach to address capacity constraints under BELA is for ELPs wishing to continue offering quality Grade R to register as schools. Previous policy has called for PEDs to make it possible for community-based ECD sites to become independent schools⁸ to support the roll-out of Grade R (Department of Education, 2008, sections 240, 254). This requires registration as an independent school under the South African Schools Act, which is administered by PEDs and entails meeting a set of minimum standards relating to governance, infrastructure, curriculum delivery, and staffing.

These requirements represent a significant regulatory and financial step, particularly for smaller or less-resourced ELPs. For example, national norms and standards for school infrastructure require Grade R classrooms of at least 60m² (Department of Basic Education, 2024).

With Grade R fully incorporated into the formal school system under BELA, Grade R teachers are also being held to stricter qualification requirements. Practitioners must now have a minimum National Qualifications Framework (NQF) Level 6 qualification, requiring the upskilling of the majority of Grade R practitioners from lower qualification levels.⁹

This transition also carries significant financial implications. For the 2025/26 financial year, the Education, Training and Development Practices Sector Education and Training Authority (ETDP-SETA) allocated R66 million from the skills development fund towards upgrading the qualifications of Grade R practitioners. Higher remuneration costs also accompany higher qualifications¹⁰.

Funding structures and system incentives in South Africa

Public schools receive per-learner allocations for Grade R as determined by Provincial Education Departments, at roughly 70% of the cost of Grade 1, although it could be as low as 50% of the cost of a Grade 1 learner.¹¹ School Governing Bodies (SGBs) typically employ and pay Grade R practitioners using Grade R allocations transferred to schools with Section 21 status. But there are also instances where PEDs pay Grade R practitioners directly on behalf of SGBs.

ELPs receive support primarily through the Early Childhood Development Conditional Grant, which provides a per-child subsidy (currently R24 per child per day for 264 days a year) for eligible children, typically those from households receiving the Child Support Grant. Nearly all ELPs charge fees ranging from as low as R50 per rand per month in low socio-economic contexts to R350 in ELPs likely to feed into Quintile 3 schools. ELPs feeding into wealthy Quintile 5 schools may charge as much as R6,400 per month (Giese et al., 2025).

ELPs offering Grade R that are not registered as independent schools with PEDs technically do not qualify for Grade R per-learner allocations. However, the 2022 World Bank public expenditure report on ECD in South Africa identifies that R279 million was spent from the national budget on ‘Grade R in ECD programmes’ in 2021/22, of which 43% was in the form of transfers and subsidies and 37% on compensation (World Bank Group, 2022). The report notes that patterns of

expenditure on Grade R in ECD programmes differ notably across provinces.

These funding streams create differentiated incentives and costs across providers. School-based Grade R is more fully funded and institutionalised within the education system, while ELPs depend mostly on a combination of ECD subsidies and user fees. There are also large existing differences in the costs of Grade R provision across schools and ELPs (World Bank Group, 2022), largely attributable to the much higher practitioner salary costs associated with Grade R in schools.

Under the strong assumption that ELP practitioners serving older children are paid similarly to those caring for younger children, older children of Grade R-eligible age may contribute disproportionately to ELP revenues, enabling providers to cross-subsidise services for younger children. Part A of Table 1 illustrates how the economics of ELPs may improve for older age groups of children, largely because regulations permit higher child-to-practitioner ratios for older age groups.

Since a single practitioner can supervise more older children, the salary cost per child declines sharply with age. For example, for infants aged 0–18 months, one practitioner may supervise only 6 children, resulting in an estimated salary cost of R873 per child per month if the practitioner is paid at the national minimum wage and cares for 6 children. If 40% of the ECD subsidy is allocated to the practitioner's salary, there will still be a monthly shortfall of R662 per child to cover the salary. Shortfalls would need to be covered through user fees, e.g. at least R225 per month for children aged 18 months–2 years.

By contrast, for children aged 5–6 years, one practitioner may supervise up to 30 children. This reduces the estimated salary cost to only R175 per child per month. Under these conditions, allocating 40% of the subsidy to salaries is sufficient to fully cover practitioner wage costs, resulting in a small surplus rather than a shortfall.¹² This could create a structural incentive for providers to prioritise enrolment

of older children, particularly those aged 5–6 years, while provision for infants and toddlers remains more expensive and financially difficult to sustain under current ECD subsidy arrangements. Under this scenario, if Grade R learners are displaced to schools, this could have negative spillovers for user fees charged to younger learners and possibly ELP access for younger children.

In reality, Grade R practitioners may be paid more than ECD practitioners serving younger children, especially if ELPs have registered Grade R programmes. In the Western Cape, for example, registered public or independent schools are required to pay Grade R practitioners a minimum of R12,376 per month – more than twice the national minimum wage (Western Cape Government, 2026). This is the minimum stipend subsidy for a school governing body-employed, unqualified Grade R practitioner. If an ELP with 30 Grade R learners were to use this salary amount for Grade R practitioners but receive only an ECD subsidy from the state, then serving a Grade R class would be about as costly as accommodating 12 children aged 18 months to 2 years. But if it were registered as an independent school that does not charge fees, the per-learner Grade R allocation of R6,600 per year (or R550 per month) would cover this salary amount, and the ELP would have about R69 left over (50% of R137)¹³ per month per Grade R learner to contribute to general operating costs.

This illustrates that the impacts of introducing in-school Grade R legislation on ELPs will depend on ELPs' existing income (e.g. existing subsidy receipt) and cost structures – especially salaries paid to ECD and Grade R practitioners. In particular, whether they register as schools offering Grade R will determine whether they receive Grade R subsidies and the regulated cost structures they then face. Impacts also depend on how closely ELPs adhere to child-to-practitioner norms in policy.

Table 1: Per-child contributions to practitioner salaries and resulting salary shortfalls, by age group and funding arrangement

ECD subsidy with Grade R practitioner paid at minimum wage example	(1) Child to practitioner ratio	(2) National min. monthly wage	(3) Cost per child per month for one ELP practitioner earning the minimum wage^a	(4) Monthly subsidy per child^b	(5) Maximum monthly contribution of child's subsidy to practitioner's salary (40%)^c	(6) Monthly shortfall per child to cover one practitioner salary at the minimum wage
0–18 months	6	R5,240	R873	R528	R211	R662
18 months–2 years	12	R5,240	R437	R528	R211	R225
3–4 years	20	R5,240	R262	R528	R211	R51
5–6 years	30	R5,240	R175	R528	R211	-R37 (surplus)
Western Cape Grade R subsidy and Grade R practitioner example	Learner to practitioner ratio	Monthly wage (min. allowed for Gr R)	Cost per child per month for one Grade R practitioner min. wage allowed^a	Subsidy per month per child^f	Monthly contribution of learner subsidy to practitioner's salary	Monthly shortfall per learner to cover one practitioner salary
5–6 years (ECD subsidy but minimum Gr R practitioner salary in WC)	30	R12,376	R413	R528 (ECD subsidy)	R211	R201
5–6 years (Gr R in no-fee independent school in WC)	30	R12,376	R413	R550 (Grade R No-fee)	R413	-R137 (surplus)
5–6 years (Gr R in fee-charging independent school in WC)	30	R12,376	R413	R315 (Grade R Fee-charging)	R413	R98

^a The monthly minimum wage in March 2026 was R5,239.90 (= (R30.23 * 8 hours * 5 days * 52 weeks) / 12 months) or R62,878.40 annually. Dividing by the child-to-practitioner ratio indicates the contribution per child required to cover one practitioner's monthly salary at minimum wage.

^b The ECD subsidy for centre-based programmes is R24 per child for a maximum of 264 days per year.

^c In policy, spending of the ECD subsidy must follow 50:30:20 (50% food, 30% salaries, and 20% other operating expenses), but in practice it tends to be 40:40:20. In the Western Cape, no-fee-charging independent schools receive R6,600 per Grade R learner per year, which must cover a Grade R practitioner minimum salary (unqualified) of R14,8510 per year, while fee-charging independent schools receive R3,780 per Grade R learner per year.

3. Method

Approach

A key methodological choice in this paper is to avoid an age-based approach to measuring Grade R participation. Specifically, we do not estimate Grade R coverage by calculating the proportion of a given age cohort (e.g. 5-year-olds) enrolled in Grade R. We strongly caution against this approach in the South African context.

The primary reason is that school-based policy and practice around the age of first entry to school are not uniform across the system. Although national education policy allows an 18-month window, in practice, schools tend to follow one of two de facto 12-month entry age policies: earlier entry aligned with a mid-year cut-off or later entry aligned with calendar-year cut-offs (Böhmer, 2026). As a result, children enter Grade R at systematically different ages across provinces and socio-economic contexts.

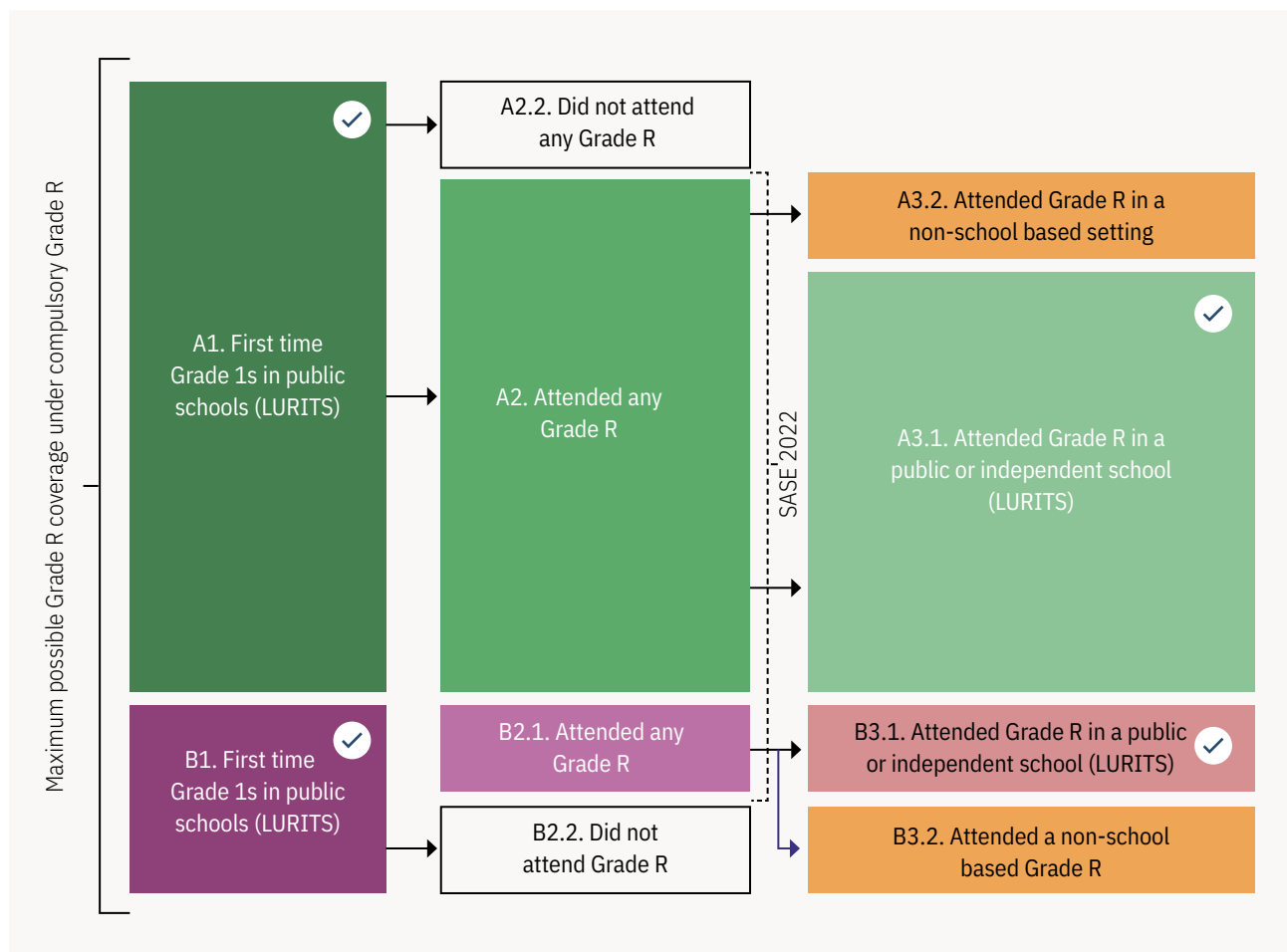
These differences are not random. For example, children in the Northern Cape and Western Cape, as well as those attending Quintile 5 and independent schools, tend to enter Grade R at older ages (see Appendix Figure A1). Consequently, simple comparisons of the proportion of 5-year-olds enrolled in Grade R across provinces or socio-economic groups would misleadingly suggest lower coverage in these areas. In reality, such patterns may primarily reflect differences in school entry age rather than true differences in Grade R access.¹⁴

To address this limitation, we adopt a cohort-based approach, following Gustafsson (2024). Rather than focusing on age-specific enrolment, we define the relevant population as first-time entrants into Grade 1.¹⁵ We then estimate how many and what percentage of these Grade 1 learners attended Grade R. The logic of this approach is illustrated in Figure 1. We conceptualise the maximum potential demand for Grade R under a compulsory system as the total number of learners who eventually enter Grade 1 in public (A1) and independent (B1) ordinary schools. To estimate how many Grade R learners are currently served outside the school system, we can only

approximate this indirectly. Specifically, we estimate the proportion of a Grade 1 cohort in school who attended Grade R, using sample-based survey data. Multiplying this Grade R participation rate by the first-time Grade 1 cohort gives an estimate of Grade R enrolment in school or out of school ($A2.1 + B2.1$). We then subtract from this the number of Grade 1 learners in schools observed in administrative data as having attended school-based Grade R ($A3.1 + B3.1$), adjusting for grade repetition in both Grade R and Grade 1, and for data inconsistencies inherent in administrative records. The remainder provides an estimate of the number of learners who attended Grade R in non-school-based settings ($A3.2 + B3.2$).

Our approach allows us to estimate Grade R coverage among Grade 1 learners attending public and independent schools, gaps in public provision under compulsory Grade R, and the potential scale of displacement from ELPs. This approach avoids the biases introduced by age-based measures of participation but is inherently imprecise due to sampling variability in sample-based survey measures.

Figure 1: Approach to identifying Grade R enrolments in school and non-school-based settings



Data

We rely on two main data sources: school administrative data from the Learner Unit Record Information Tracking System (LURITS) for the 2022–2024 period, and large sample-based survey data from the 2022 South African Systemic Evaluation (SASE). Anonymised learner-level data from LURITS contain population-level information on all school-goers in South Africa. We draw predominantly on the Grade R and 1 learner-level data from LURITS and focus the analysis of this data on learners in ordinary schools. Ordinary schools target a general study body and are distinct from special schools, which target learners with significant or complex learning or physical barriers.

SASE is a large-scale, nationally representative, sample-based study conducted by the Department of Basic Education (DBE) designed to assess the performance of the education system in Grades 3, 6, and 9. We utilise the Grades 3 and 6 samples from SASE, which are representative of Grade 3 and 6 learners in ordinary schools in 2022. The samples are large enough to be representative at the national, provincial, and the DBE's school quintile levels¹⁶. In addition to learner outcomes, SASE collects background data from learner questionnaires and parent/caregiver questionnaires, including information on Grade R attendance. The researchers were not provided with the contextual background questionnaires, but SPSS metadata indicates that parents were asked “Did your child attend Grade R? (yes, no)” and the learners were asked, “Did you attend Grade R? (yes, no)”. Of the 50,062 Grade 3 learners and 51,997 Grade 6 learners in the SASE study, 83.5% and 89% had non-missing data on Grade R attendance. We use multiple imputation to impute Grade R attendance for the missing observations.

What is currently not clear is whether SASE sampled independent schools. This is not specified in any official documentation available to the researchers. We can identify learners in Quintile 1–5 public schools. But roughly 4.8% of the Grade 3 learner sample and 3.8% of the Grade 6 learner sample have a missing school quintile, although these learners' student performance, home background assets and Grade R attendance resemble that of learners in Quintile 5 schools. We assume that these learners are in independent schools.

We also assess the plausibility of our out-of-school or ELP Grade R enrolment estimates drawing on the Thrive by Five Index 2024 data and the General Household Survey (GHS) 2024.

The Thrive by Five Index 2024 provides a nationally representative dataset of early learning programmes (ELPs) in South Africa, making it possible to identify from the supply side whether Grade R is offered within ELPs. The sampling process selected 432 wards across all nine provinces using probability proportional to size sampling, based on the number of Grade 3 learners in each ward. Within these sampled wards, a comprehensive listing exercise was undertaken to establish an up-to-date sampling frame of eligible ELPs, from which 1,388 ELPs were randomly selected (Giese et al., 2025).¹⁷

Although the Thrive by Five Index is primarily a survey of 4-year-olds (aged 50–59 months) and the ELPs they attend, rather than a dedicated Grade R survey, it includes information from ELP principals on whether the ELP offers Grade R classes and whether these classes are registered with the DBE.

While the survey does not collect data on the number of children specifically enrolled in Grade R, it does capture information on total enrolment, fee structures (including fees by age group), and the proportion of enrolled children for whom subsidies are received. These data provide a useful basis for estimating the potential financial implications of displacing Grade R learners from ELPs.

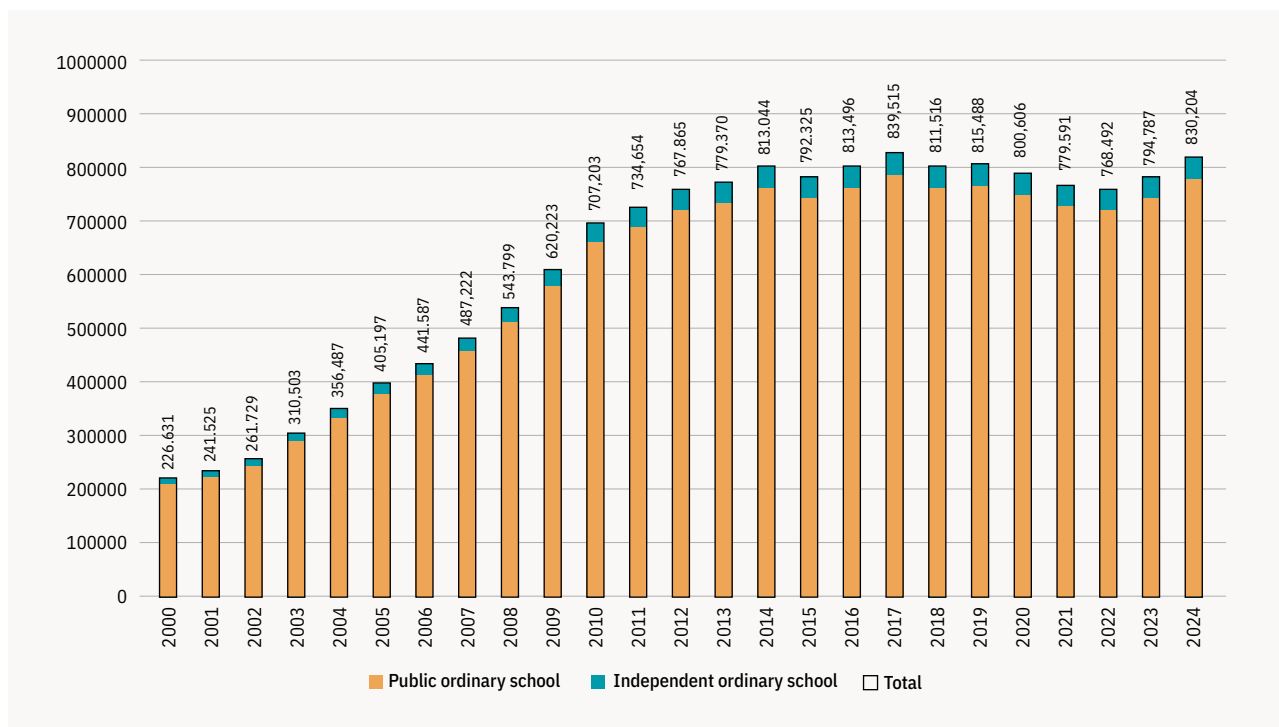
The GHS is a nationally representative survey of households in South Africa – with a sample size of approximately 33,000 dwelling units – that includes an ECD module on early learning attendance among children aged 0–6 years. Applying population corrections, we use the 2024 GHS round to obtain estimated totals of children aged 4–6 years in Grade R outside schools.

4. Findings

Trends in school-based Grade R enrolment

Grade R enrolment in South Africa expanded rapidly in the early 2000s, reflecting the large-scale rollout of early childhood education within the public school system. About 226,000 learners were enrolled in school-based Grade R in 2000. National Grade R enrolment in public schools grew at annual rates of approximately 12–13% between 2000 and 2010, with particularly strong gains in historically underserved provinces such as the Eastern Cape, North West, and Mpumalanga. The expansion was somewhat more uneven in the independent school sector, though it too experienced periods of notable growth.

Figure 2: Grade R enrolment in schools from School Realities, 2000–2024



By 2010, roughly 707,000 learners were enrolled in school-based Grade R (Figure 2) – just short of the 800,000 target for 2010 set in Education White Paper 5. After 2010, school-based Grade R enrolment growth slowed markedly, declining to just 2.6% between 2010 and 2015 and approaching zero in the subsequent period, suggesting that enrolment had reached saturation levels (see Table 2).

In several provinces, including the Eastern Cape and KwaZulu-Natal, growth turned very slightly negative, which in the Eastern Cape may reflect declining population growth and outmigration. This slowdown is most evident in the public sector, where growth stagnated after 2015. In the independent sector, there was continued expansion in some provinces, alongside declines in others.

By the 2020–2024 period, national Grade R enrolment growth in public ordinary schools remained modest at under 1%, with declines in school-based Grade R enrolment totals during the COVID-19 pandemic years (Gustafsson, 2021).

Overall, the trends indicate a transition from rapid expansion to a mature system with limited scope for further school-based Grade R enrolment growth by 2024. When BELA made Grade R compulsory in 2024, what was needed was a greater focus on quality, ELP access for younger children, and targeted rather than generalised efforts to support Grade R access for those not yet accommodated in the school or ELP system.

Table 2: Annual growth rates in Grade R enrolment in schools

Grade R growth in all schools	EC	FS	GP	KZN	LP	MP	NC	NW	WC	National
2000–2005	46.0%	3.0%	13.5%	2.7%	4.4%	19.4%	12.2%	23.9%	29.1%	12.9%
2005–2010	11.8%	7.4%	12.3%	17.0%	2.8%	23.1%	13.6%	33.2%	5.2%	11.8%
2010–2015	-2.7%	6.3%	8.6%	1.3%	1.6%	2.7%	9.6%	4.4%	8.4%	2.6%
2015–2020	-3.1%	2.1%	1.1%	-0.4%	0.2%	1.1%	2.5%	1.1%	1.9%	0.1%
2020–2024	-0.6%	0.0%	2.2%	0.4%	0.9%	2.4%	0.1%	2.5%	0.4%	0.9%
Grade R growth in public schools	EC	FS	GP	KZN	LP	MP	NC	NW	WC	National
2000–2005	46.0%	3.0%	18.3%	2.8%	4.5%	19.3%	12.3%	25.4%	31.1%	13.4%
2005–2010	11.7%	7.6%	13.0%	17.2%	2.6%	24.2%	13.8%	34.0%	5.1%	11.9%
2010–2015	-2.9%	6.3%	8.5%	1.3%	1.5%	2.7%	9.6%	4.3%	8.6%	2.4%
2015–2020	-3.3%	1.9%	1.2%	-0.3%	-0.1%	1.1%	2.3%	0.9%	1.8%	0.0%
2020–2024	-0.9%	0.2%	2.8%	0.4%	0.5%	2.3%	0.0%	2.4%	0.5%	0.9%
Grade R growth in independent schools	EC	FS	GP	KZN	LP	MP	NC	NW	WC	National
2000–2005	42.9%		-2.7%	0.6%	-3.2%	16.3%	12.7%		8.6%	3.5%
2005–2010	20.6%	2.6%	8.6%	7.9%	18.0%	6.4%	4.9%	12.2%	5.2%	10.0%
2010–2015	3.8%	7.4%	9.4%	1.1%	4.7%	3.3%	6.9%	8.7%	4.7%	6.1%
2015–2020	4.5%	7.6%	0.9%	-3.0%	7.0%	-0.7%	17.2%	6.2%	3.7%	2.4%
2020–2024	4.7%	-8.3%	-1.9%	0.6%	7.4%	5.9%	3.8%	6.9%	-2.4%	1.6%

Source: School Realities 2000–2024.

Notes: Annualised log-linear growth rates used. There are missing data entries in some years for independent schools in the Free State and North West. Only enrolment growth in ordinary schools is considered.

Grade R participation rates across school and non-school based environments

While school administrative data provide a clear picture of growth in school-based Grade R enrolment and the number of learners accommodated in schools, they do not indicate the overall proportion of children accessing Grade R across all settings, including ELPs. As such, they cannot fully capture population-level participation in Grade R.

The 2022 South African Systemic Evaluation (SASE) provides evidence of Grade R participation across a combination of school- and non-school-based settings for nationally and provincially representative samples of Grade 3 and Grade 6 learners in ordinary schools. Among learners in public schools with non-missing data, approximately 92% were reported by

a parent or caregiver to have attended Grade R, suggesting that coverage was already high by around 2016¹⁸. After using multiple imputation¹⁹ to account for missing data on Grade R attendance – affecting 16.5% and 11% of the Grade 3 and 6 samples, respectively – we also obtain an estimate that 92% of Grade 3 and 6 learners in 2022 had attended Grade R.

There is notable provincial variation in Grade R coverage as seen in Table 3. Reported attendance is lowest in North West (around 86% among Grade 3 learners), while provinces such as KwaZulu-Natal (95%) and Eastern Cape (95%) report near-universal participation. It is not clear why Grade R attendance rates vary so starkly across the Grade 3 and 6 Limpopo samples.

Table 3: Percentage of Grade 3 and 6 learners in public schools that attended Grade R in a school-based or ELP environment (parent or self-report) by province, SASE 2022

Province	Grade 3s that attended Grade R	SE	N not missing	N missing	Grade 6s that attended Grade R	SE	N not missing	N missing
EC	95.4%	0.37	4,283	987	91.9%	0.42	4,720	778
FS	90.8%	0.51	3,901	959	87.4%	0.53	4,077	589
GP	90.0%	0.46	4,240	1,081	90.8%	0.43	4,716	717
KZN	95.3%	0.31	5,116	823	93.0%	0.36	5,680	440
LP	87.4%	0.49	5,529	604	93.1%	0.34	6,060	465
MP	92.9%	0.35	5,311	761	93.0%	0.34	6,133	474
NC	90.0%	0.56	3,307	738	90.1%	0.52	4,014	470
NW	85.6%	0.57	4,833	848	86.3%	0.48	5,493	658
WC	93.5%	0.37	3,759	1,130	90.8%	0.50	4,117	925
National public	92.0%	0.16	40,279	7,931	91.5%	0.15	45,010	5516

Source: South African Systemic Evaluation 2022. Own calculations.

Notes: Student weight (WT_2022) applied, and standard errors account for provincial stratification. Only ordinary public school samples are considered. Multiple imputation was used for missing responses on Grade R attendance. The parent response was used as the primary source of information on Grade R attendance, but learner responses were used if parent/caregiver responses were missing. After triangulating across learner and parent questionnaires, Grade R attendance responses are missing for 16.5% of the unweighted Grade 3 national public sample, with missingness ranging from 9.8% in Limpopo to 23% in the Western Cape. Grade R attendance is missing for 11% of the unweighted Grade 6 national sample, with missingness ranging from 7.1% in Limpopo to 18% in the Western Cape. Only schools with Quintile status 1–5 are included in the sample above.

Socioeconomic differences are also evident (see Figure 3), with Grade R attendance rates of 90–92% among 2022 Grade 3 and Grade 6 learners in Quintiles 1–4 schools, compared with a higher rate of almost 96% among learners in Quintile 5 schools. Not shown in the figure is a 95% Grade R attendance rate among learners in schools with missing school quintile – assumed to be learners in independent schools. Overall, the findings point to high but not yet universal access to Grade R between 2016 and 2019, with inequalities across provinces and socioeconomic groups.

Province-by-school-quintile patterns (generated for a combined sample of Grade 3 and Grade 6 learners) are also interesting, with stark differences in Grade R attendance rates between learners in Quintile 1–3 schools and Quintile 5 schools in provinces such as North West and Gauteng (see Figure 4). However, we draw attention to the large confidence intervals, particularly for Quintile 5 estimates, at the provincial level, which will introduce imprecision into our estimates of Grade R attendance despite large survey samples. Results from a linear probability model estimating the likelihood of attending Grade R (as reflected among Grade 3 learners and 6 learners in SASE 2022) indicate only modest

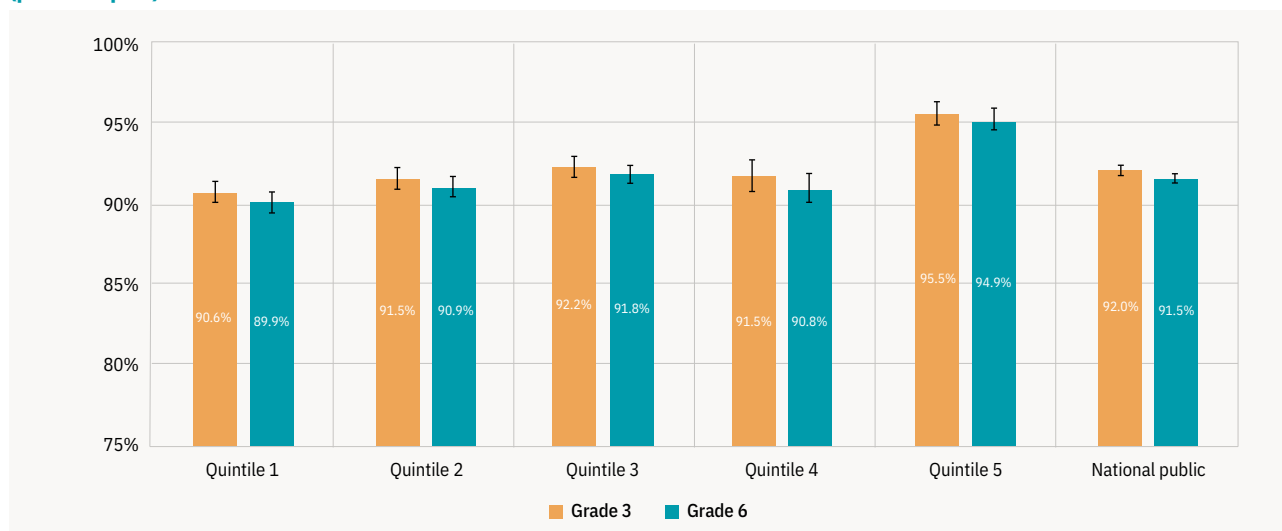
differences by learner characteristics (see Appendix Table 1A).

Girls are slightly more likely than boys to have attended Grade R, though the difference is very small – less than one percentage point. There is also little variation in attendance between Grade 3 and Grade 6 learners, consistent with the view that Grade R coverage had largely plateaued by around 2016.

Socioeconomic gradients are quite pronounced: learners in Quintile 5 schools are approximately 4–5 percentage points more likely to have attended Grade R than those in Quintile 1 schools even after controlling for other factors such as province, grade and an asset-based index measure of household wealth.

Beyond school-level socioeconomic status, household characteristics also matter. Higher household wealth is associated with a greater likelihood of Grade R attendance, and learners living with at least one parent are two percentage points more likely to have attended than those not living with a parent.

Figure 3: Percentage of Grade 3 and Grade 6 learners in 2022 in public schools who attended Grade R by DBE school quintile (parent report)



Source: SASE 2022. Own calculations.

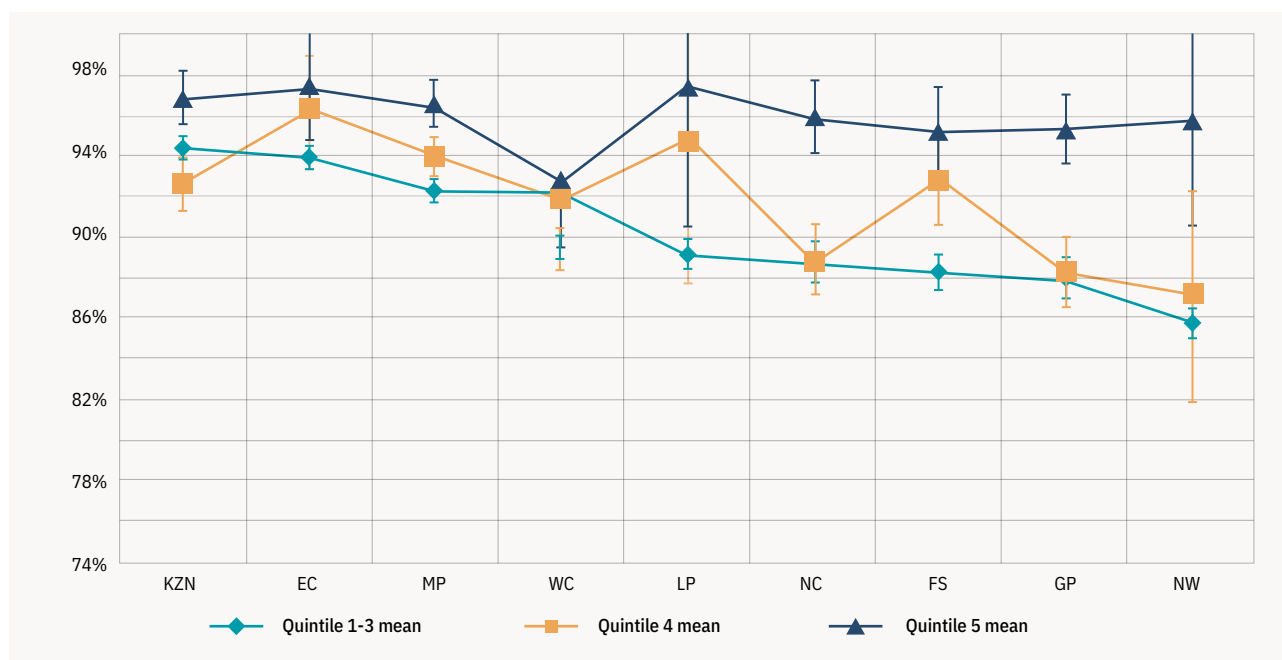
Notes: Student weights [WT_2022] were applied, and standard errors account for provincial stratification. Only ordinary public school samples are considered here. Multiple imputation was used to address missing responses on Grade R attendance. The parent response was used as the primary source of information, but if missing, learner responses on the Grade R attendance question were used. Even after triangulating across learner and parent questionnaires, Grade R attendance is missing for 16.5% of the unweighted Grade 3 national sample, with missingness ranging from 14% in Quintile 1 schools to just over 20% in Quintile 4 and 5 schools. Grade R attendance is missing for 11% of the unweighted Grade 6 national sample, with missingness ranging from 9% in Quintile 1 schools to 16% in Quintile 5 schools. The sample above only includes public ordinary schools with quintile status 1–5.

It is not possible to determine from the SASE 2022 data whether learners attended Grade R in schools or outside schools (in ELPs). By comparing SASE Grade R attendance rates with estimates of the proportion of first-time Grade 1

learners enrolled in Grade R in schools – as seen in LURITS data – we aim to estimate Grade R provision in ELPs, outside schools later in the analysis.

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Figure 4: Percentage of Grade 3 and Grade 6 learners (2022) in public schools that attended Grade R, by province and DBE school quintile, SASE 2022



Source: SASE 2022. Own calculations.

Notes: Student weights [WT_2022] were applied, and standard errors account for provincial stratification. Sample includes learners in public ordinary schools. Multiple imputation was applied for missing data on Grade R attendance. 95% confidence intervals are shown for Quintile 1–3, Quintile 4 and Quintile 5 schools. The Grade 3 and 6 samples are pooled together for this analysis, except in the case of Limpopo Quintile 1–3 schools, which are drawn from the Grade 6 sample only.

Trends in independent school Grade R enrolment

The share of school-based Grade R enrolment in independent schools remains relatively small across South Africa (as seen in Figure 2), with clear provincial variation. Nationally, the independent sector accounts for a modest share of Grade R enrolments in schools – rising from around 3.8% in 2005 to just over 5% by 2024. But these aggregates mask substantial differences across provinces (see Figure 5).

Gauteng consistently stands out, with the highest proportion of Grade R enrolments in independent schools, reaching around 15–16% in the mid-2000s and remaining elevated at approximately 11–14% in recent years.²⁰ Of the 42,954 national school-based Grade R learners enrolled in independent schools in 2024, 15,445 (36%) of these were located in Gauteng.

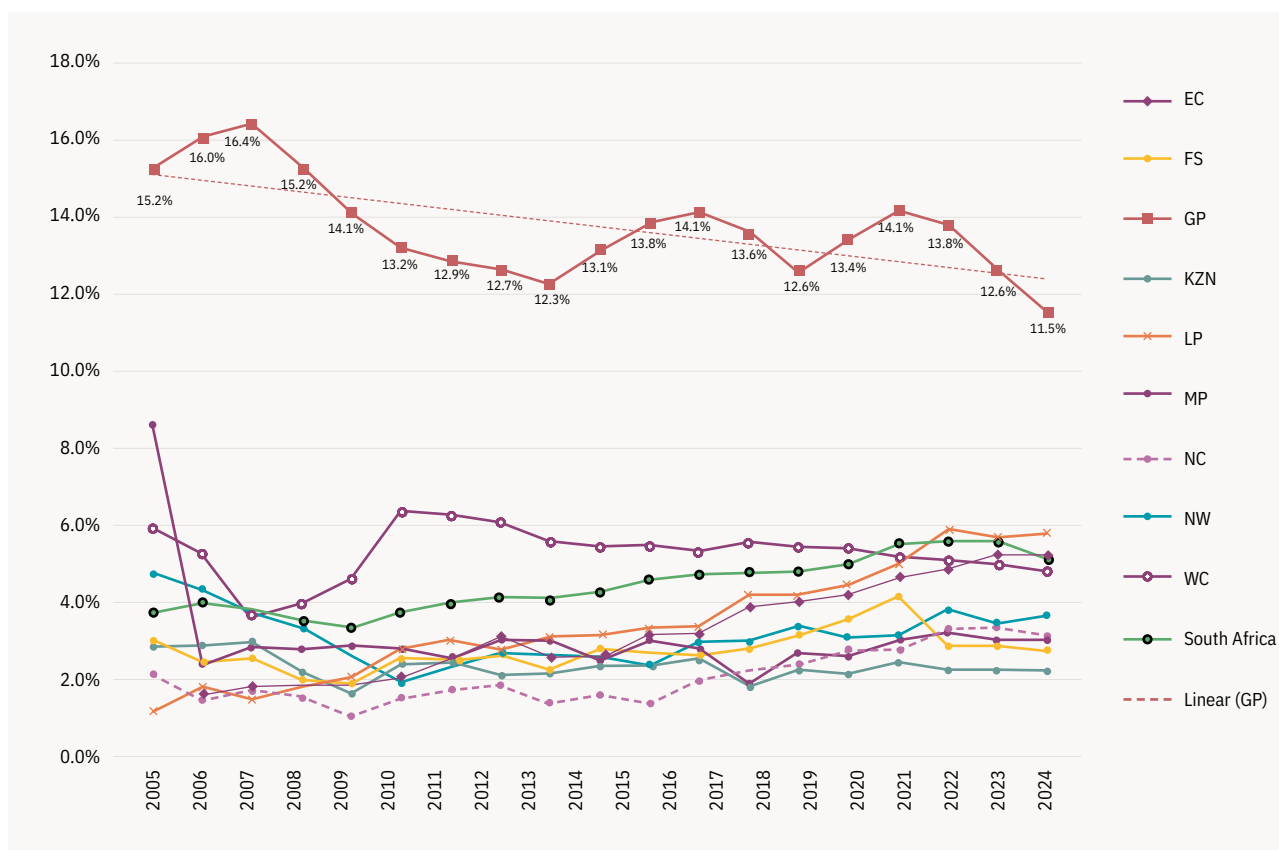
The Western Cape also shows a relatively large presence of Grade R learners in independent schools, around 5–6%

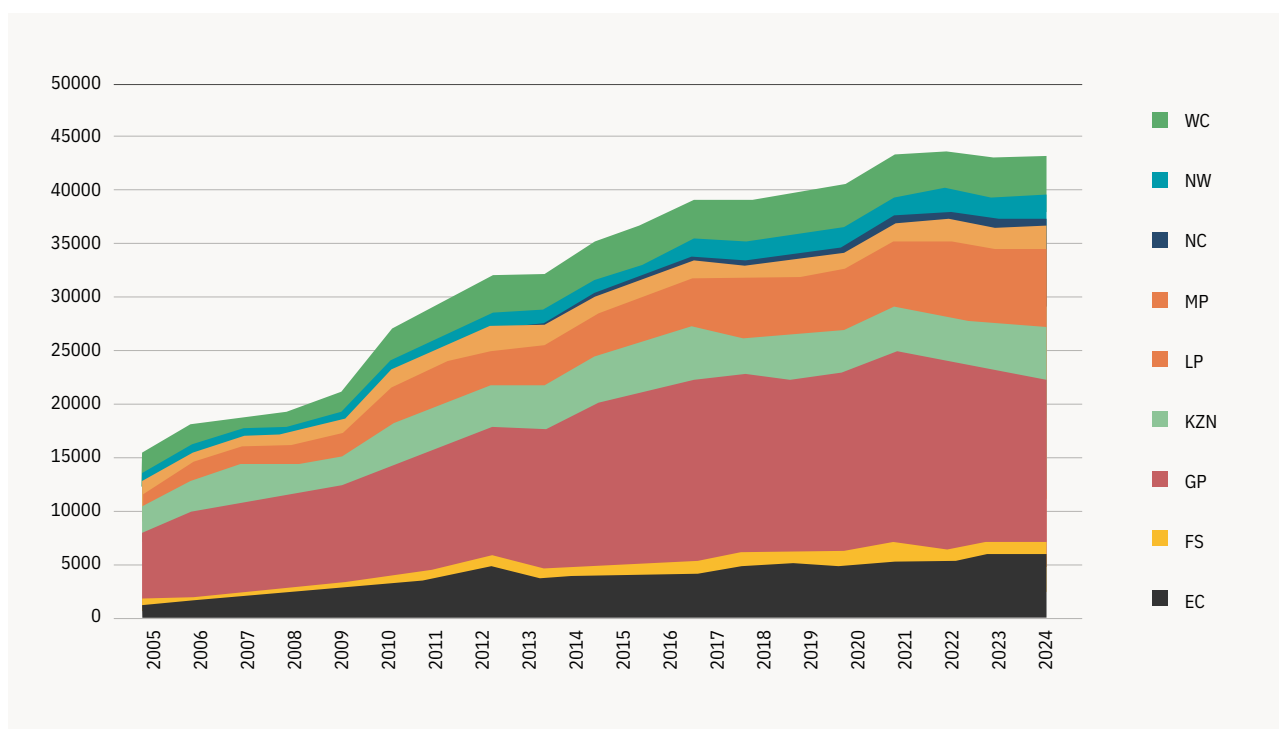
in 2024. However, because its learner population is much smaller, these 3,588 children account for only 8% of all Grade R learners nationally in independent schools.

The proportion of Grade R learners in independent schools in Limpopo and the Eastern Cape has steadily increased over time, though from a low base, reaching approximately 5–6% by 2024 (Figure 5). In contrast, independent school Grade R provision remains very limited in several provinces, particularly KwaZulu-Natal, the Northern Cape, and Mpumalanga, where the share of school-based Grade R enrolment generally remains below 3%. The Free State and North West occupy an intermediate position, with modest increases over time but still relatively low levels overall.

The data indicate that while Grade R in independent schools has expanded slightly and unevenly over time, it continues to play a minor but regionally differentiated role, with meaningful presence concentrated primarily in more urbanised provinces, particularly Gauteng.

Figure 5: Percentage and numbers of school-based Grade R learners enrolled in independent schools by province





Source: School Realities report based on EMIS, 2005–2024. Own graphs. Notes: Ordinary school enrolment only. The figures for 2017 are excluded due to lower-than-expected enrolment numbers in EMIS across the entire school system that year.

Estimating gaps in Grade R provision in schools

In this section, we aim to answer the question of how many children are not accommodated in school-based Grade R. We follow Gustafsson (2024) in identifying gaps in Grade R provision in public schools. This involves two main steps.

First, we identify the cohort or population of interest, which is the number of first-time Grade 1 learners in **year t** in public ordinary schools (column D in the tables presented). This requires subtracting the number of Grade 1 repeaters in **year t** from the number of all Grade 1 learners in **year t** in public ordinary schools (column C). To account for data losses, the number of Grade 1 repeaters is adjusted upwards by the percentage of Grade R learners in a public ordinary school in **year t-1** who are neither found in Grade R nor Grade 1 in any public or independent ordinary schools in **year t** (as summarised in column B).

Second, we identify the gap in Grade R provision in public schools as the number of first-time Grade 1 learners who did not attend Grade R in public ordinary schools (Column F). To do this, we subtract from the number of first-time Grade 1 learners in **year t** (Column D) those who are identified as moving from Grade R in a public ordinary school in **year t-1** to Grade 1 in a public school in **year t** (Column E).

We also disaggregate these estimates by province and school quintile. Furthermore, we apply this logic to estimate gaps in Grade R provision across both public and independent schools.

Grade R provision gaps if all public school Grade 1 learners were accommodated in public school Grade R

In 2024, about 181,000 first-time Grade 1 learners in public schools had not attended Grade R in a public school the previous year (Table 4). This represents 20% of the first-time Grade 1 cohort in public ordinary schools and very roughly equates to 6,050 additional Grade R classes required nationally to accommodate these learners, using a class size norm of 30 (DBE, 2025).

This estimate is slightly lower than the corresponding estimate of 188,000²¹ for the 2023 first-time Grade 1 cohort in public ordinary schools. There were, however, large differences across provinces: the proportion was about 4% in Limpopo, 12% in the Eastern Cape, but as high as 29% in the Western Cape and 38% in Gauteng.

Table 4: Calculation of the number of 2024 Grade 1 learners in public schools who did not attend Grade R in public schools the previous year (using LURITS 2023–2024)

	A: Public school Grade R in 2023	B: % of A not found in any school-based Gr R or 1 in 2024	C: Public school Grade 1 in 2024	D: First-time Grade 1 in public schools	E. From Grade R in public school to Grade 1 in public school	F. First-time Grade 1 in public school who did not attend Grade R in a public school**	F as a % of D	F expressed as number of Grade R classes required
EC	106,520	4.7%	128,504	114,562	95,958	13,903	12.1%	463
FS	37,250	2.1%	50,993	47,135	35,174	11,219	23.8%	374
GP	113,041	5.4%	193,771	178,594	103,947	68,660	38.4%	2,289
KZN	167,000	3.7%	207,742	190,769	157,752	26,924	14.1%	897
LP	117,273	2.3%	127,498	119,985	112,246	5,075	4.2%	169
MP	66,417	3.0%	85,853	80,386	63,249	15,154	18.9%	505
NC	19,286	1.5%	25,489	22,450	18,622	3,554	15.8%	118
NW	53,062	3.5%	67,113	62,088	49,929	10,343	16.7%	345
WC	69,579	2.0%	100,721	92,233	64,343	26,547	28.8%	885
SA	749,428^	3.5%	987,684^	908,328	701,220	181,489	20.0%	6,050

Source: LURITS 2023–2024 data. Own calculations.

Notes: Schools here are public ordinary schools. Grade R class size norm of 30 used. These estimates are very close to those reported in School Realities: 749,957 Grade R learners in 2023 in public schools and 987,765 Grade 1 learners in public schools in 2024.

Grade R provision gaps if public school Grade 1 learners were accommodated in Grade R at public or independent schools

The independent school sector may accommodate some Grade R learners who move into the public sector for Grade 1. After accounting for this, we estimate that roughly 173,400 (19%) of first-time Grade 1 learners in public schools did not

attend Grade R in any school, compared with an estimate of 181,000 if only Grade R provision in public schools is considered (Table 5).

If all first-time Grade 1 learners in the public system attended Grade R in a school, about 5,780 additional Grade R classes would be needed nationally (assuming Grade R class sizes of 30), with about 2,165 in Gauteng alone.

Table 5: Calculation of the number of 2024 Grade 1 learners in public schools who did not attend Grade R in a public or independent school the previous year (using LURITS 2023–2024)

	A: Grade R in 2023 in any school	B: % of A not found in school-based Grade R or 1 in 2024	C: Public school Grade 1 in 2024	D: First-time Grade 1 in public school**	E. From Grade R in any school to Grade 1 in public school	F. First-time Grade 1 in public school who did not attend Grade R in any school**	F as a % of D	F expressed as number of Grade R classes required
EC	112,507	4.8%	128,504	114,542	96,621	13,045	11.4%	435
FS	38,376	2.1%	50,993	47,133	35,307	11,060	23.5%	369
GP	129,367	7.2%	193,771	178,315	105,251	64,953	36.4%	2,165
KZN	170,903	3.9%	207,742	190,743	158,200	26,186	13.7%	873
LP	124,391	2.5%	127,498	119,968	112,923	4,112	3.4%	137
MP	68,558	3.2%	85,853	80,377	63,476	14,810	18.4%	494
NC	19,961	1.9%	25,489	22,435	18,717	3,352	14.9%	112
NW	54,963	3.9%	67,113	62,068	50,129	9,915	16.0%	331
WC	73,287	2.2%	100,721	92,217	64,657	26,081	28.3%	869
SA	792,313	4.0%	987,684	907,948	705,281	173,400	19.1%	5,780

Source: LURITS 2023–2024 data. Own calculations.

Notes: Schools here are ordinary schools. **Adjust estimates upward using column B. The estimates of the number of Grade 1 learners not repeating in public schools differ by about 1,000 learners compared to Table 4 due to different data loss errors (column B) recorded when including Grade R in independent schools. About 12% of Grade R learners in independent schools in 2023 are not found in LURITS data the following year. This may be due to data linking issues.

Table 6: Calculation of the number of 2024 Grade 1 learners in public schools who did not attend Grade R in a public or independent school the previous year, by school quintile (using LURITS 2023–2024)

	A: Any school Grade R in 2023	B: % of A not found in any school-based Grade R or 1 in 2024	C: Public school Grade 1 in 2024	D: First-time Grade 1 in public school**	E. From Grade R in any school to Grade 1 in public school	F. First-time Grade 1 in public school who did not attend Grade R in any school**	F as a % of D	F expressed as number of Grade R classes required
Quintile 1	196,711	3.7%	235,972	216,295	182,368	27,011	12.5%	900
Quintile 2	184,723	3.5%	226,058	207,739	172,487	28,945	13.9%	965
Quintile 3	201,765	3.6%	257,647	233,499	187,938	38,604	16.5%	1,287
Quintile 4	86,230	3.2%	125,922	116,179	82,867	30,543	26.3%	1,018
Quintile 5	78,103	3.4%	138,347	131,165	77,077	51,402	39.2%	1,713
Independ.	42,885	12.0%	-	-	-	-	-	-
Missing	1,896	4.9%	3738	3450	2544	776	22.5%	26
SA	792,313	4.0%	987,684	907,948	705,281	173,400	19.1%	5,780

Source: LURITS 2023–2024 data. Own calculations.

Notes: Schools here are ordinary schools. **Adjust estimates upward using column B. The estimates of the number of Grade 1 learners not repeating in public schools differ by about 1,000 learners compared to Table 4 due to different data loss errors (column B) recorded when including Grade R in independent schools.

The gaps in Grade R provision in public schools are concentrated among the middle-class, particularly in Gauteng, where about 39% and 26% of first-time Grade 1 learners in Quintile 5 and 4 schools, respectively, did not attend Grade R at a school (Table 6).

Nationally, first-time Grade 1 learners in Quintile 4 and 5 schools account for almost half (47%) of those who did not attend Grade R in a school (either public or independent). Figure 6 further disaggregates these results by province and quintile, showing distinct differences across provinces in the proportion of learners not attending Grade R in a school.

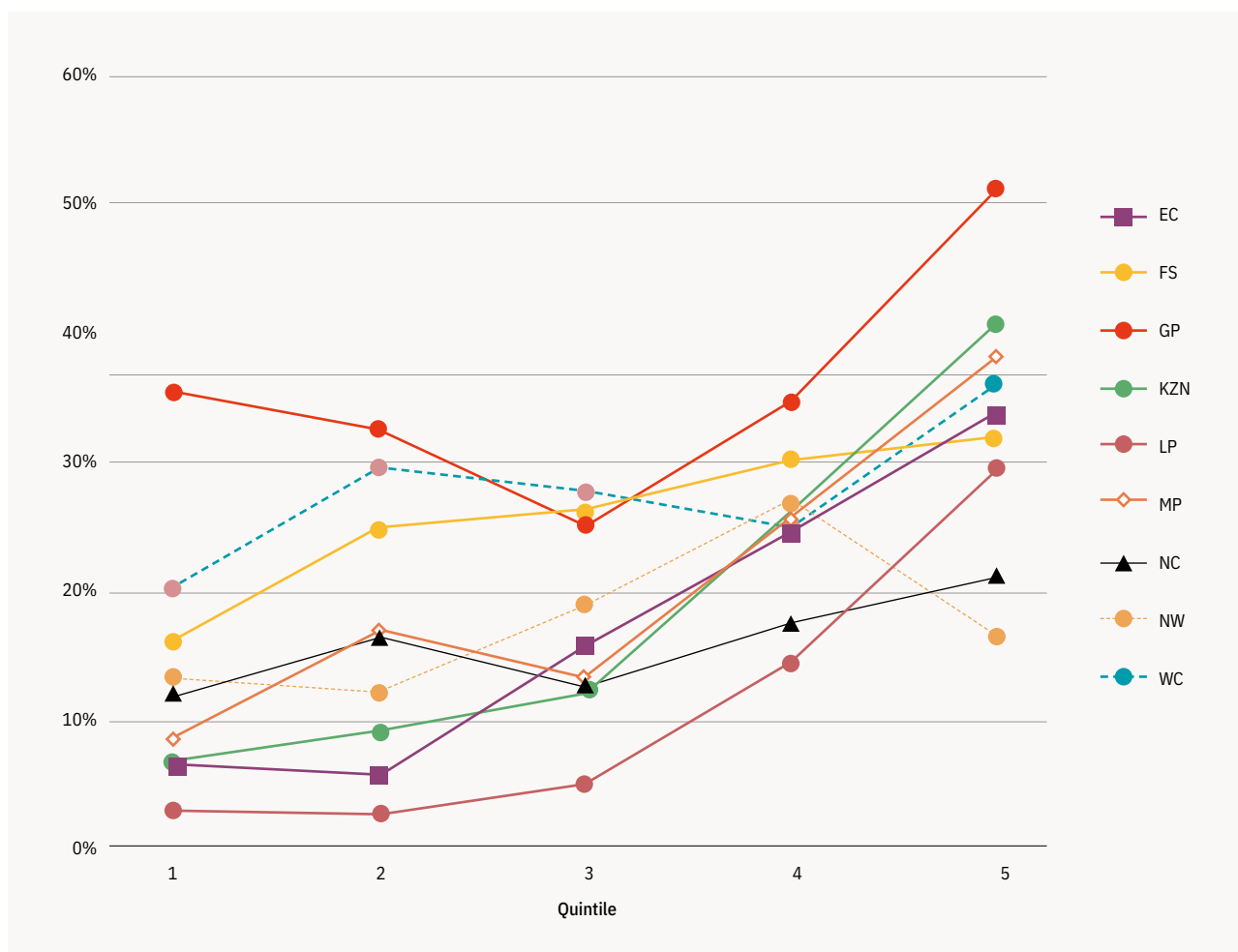
In almost all provinces, learners in Quintile 5 schools are the least likely to have attended Grade R in a school. Gauteng

learners in Quintile 4 and 5 schools account for almost a quarter (24%) of Grade 1 learners nationally in public schools who did not attend Grade R in a school and just over 1,400 (1,006 + 396) Grade R classes (see Figure 7).

Among Quintile 1–3 learners, not attending Grade R in a school is a relatively common practice in Gauteng, followed by the Western Cape and Free State.

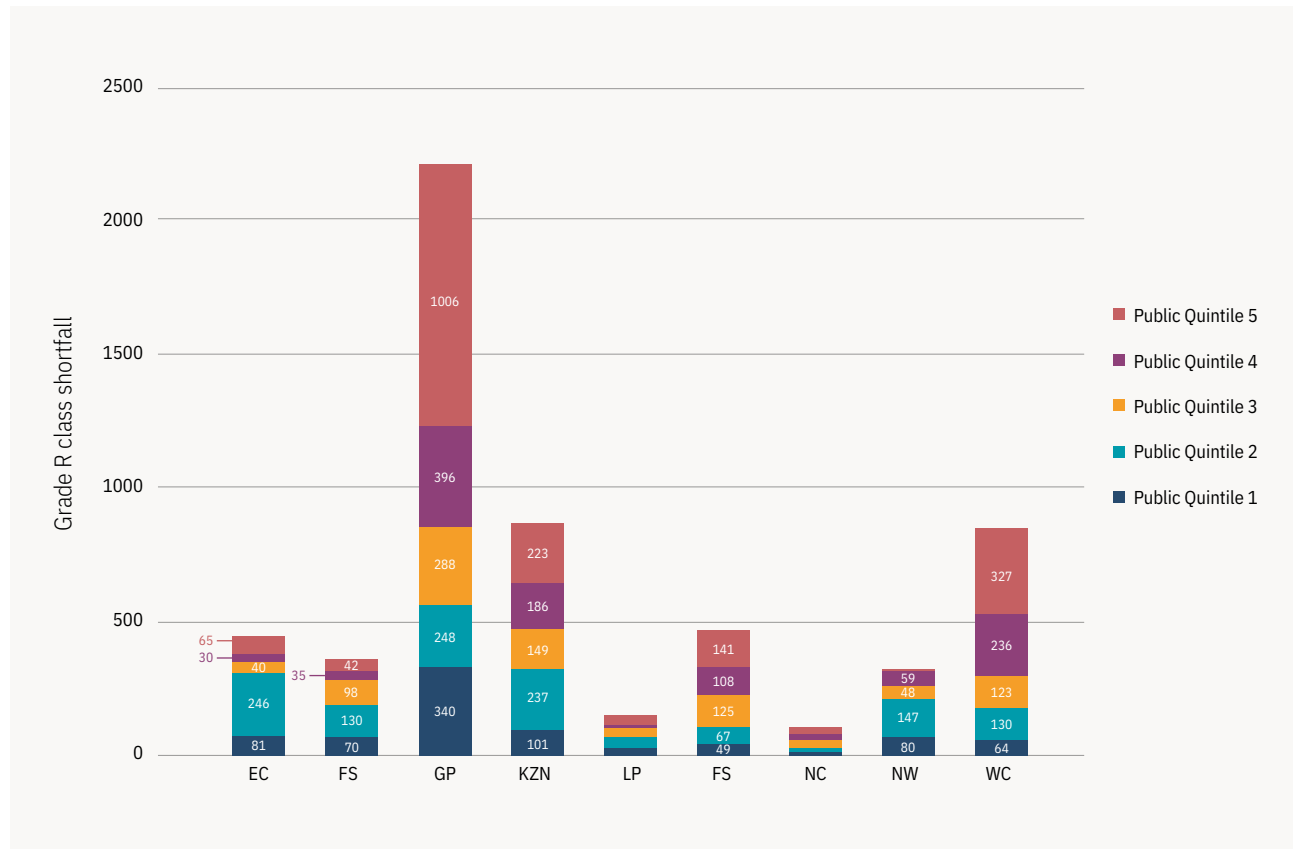
As discussed later, the main reason for high rates of learners in Quintile 4 and 5 schools not attending Grade R in schools is that they are attending Grade R in ELPs. This is implied when contrasted with high rates of Grade R coverage among learners in Quintile 4 and 5, reflected in SASE 2022 estimates.

Figure 6: Percentage of first-time Grade 1 learners in public schools in 2024 who did not attend Grade R in public or independent schools, by province and school quintile combinations



Source: LURITS 2023–2024 data. Own calculations. Only ordinary schools considered in calculations.

Figure 7: Grade 1 learners in public schools who did not attend Grade R in public or independent schools, expressed in Grade R class numbers



Source: LURITS 2023–2024 data. Own calculations.

Notes: Assumes a Grade R class size of 30 learners, based on the DBE (2025) Regulations on Minimum Uniform Norms and Standards for Capacity of Ordinary Public Schools, Notice 3416 of 2025. Of course, in practice, Grade R class size averages may vary across provinces and schools, deviating from a set number of 30.

Gaps in Grade R provision if all Grade 1 learners in schools were accommodated in school-based Grade R

Extending the estimation approach to Grade R provision in both public and independent ordinary schools, about 201,000 first-time Grade 1 learners in public or independent ordinary schools in 2024 had not attended Grade R in an ordinary school (Table 7). This represents about 21% of first-time Grade 1 learners across public and independent schools nationally, with the highest proportions in Gauteng (38.6%) and the Western Cape (29.3%).

In absolute terms, as many as 79,723 first-time Grade 1

learners in Gauteng's public and independent schools in 2024 had not attended Grade R in a school. This represents about 40% of the 2024 national first-time Grade 1 cohort in public schools who had not attended Grade R in a school the previous year (see Figure A 2).

Only 14% of first-time Grade 1 learners in ordinary schools in KwaZulu-Natal in 2024 had not attended Grade R in a school the previous year, which, given KwaZulu-Natal's large child population, amounts to 28,286 learners. This is a similar number to that in the Western Cape, where 28,820 (29.5%) of first-time Grade 1 learners were not accommodated in school-based Grade R.

Table 7: Calculation of the number of first-time 2024 Grade 1 learners in any public or independent ordinary school who did not attend Grade R in a public or independent ordinary school the previous year (using LURITS 2023–2024)

	A: Any school Grade R in 2023	B: % of A not found in any school-based Grade R or 1 in 2024	C: Any school Grade 1 in 2024	D: First-time Grade 1 in any school**	E. From Grade R in any school to Grade 1 in any school	F. First-time Grade 1 in any school who did not attend Grade R in any school**	F as a % of D	F expressed as number of Grade R classes required
EC	112,507	4.8%	136,753	122,482	101,875	15,466	12.6%	516
FS	38,376	2.1%	52,597	48,662	36,256	11,620	23.9%	387
GP	129,367	7.2%	222,929	206,365	117,581	79,723	38.6%	2,657
KZN	170,903	3.9%	213,416	196,216	161,442	28,286	14.4%	943
LP	124,391	2.5%	136,213	128,365	119,243	6,025	4.7%	201
MP	68,558	3.2%	89,234	83,592	65,335	16,104	19.3%	537
NC	19,961	1.9%	26,187	23,068	19,166	3,527	15.3%	118
NW	54,963	3.9%	70,388	65,070	51,668	11,316	17.4%	377
WC	73,287	2.2%	106,937	98,272	67,899	28,820	29.3%	961
SA	792,313	4.0%	1,054,654	972,267	740,465	201,075	20.7%	6,702

Source: LURITS 2023–2024 data. Own calculations.

Notes: Only enrolment in ordinary schools considered. **Adjust estimates upward using column B.

Capacity for absorbing Grade R enrolment within the school sector

Of about 18,000 public and independent schools offering Grades 1–3, we identify only about 815 in 2024 that did not have any Grade R enrolments. There were just 365 public schools with Grades 1–3 enrolments but no Grade R learners enrolled, representing 2.3% of all public schools offering Grades 1–3 (see Table A3).

Based on first-time Grade 1 enrolments in these schools, adding Grade R to all 365 public schools would accommodate approximately 20,000 learners (see Table 8). This is modest relative to the estimated shortfall of 181,000 Grade R places in public ordinary schools – equivalent to only 11.2% of the gap. Adding Grade R to these schools could add roughly 666 additional Grade R classes²², compared with the approximately 6,050 classes that would be needed if all first-time Grade 1 learners in public schools were to attend Grade R in public schools.

While a much larger share of independent schools – over 20% – offer Grades 1–3 without Grade R²³, their smaller enrolments mean that their overall contribution to expanding capacity is limited in absolute terms. Together, public and independent schools without Grade R, but with positive enrolment in Grades 1–3, account for around 29,000 first-time Grade 1 learners. This represents less than 15% of the approximately 201,000 learners not accommodated in school-based Grade R.

As a result, the vast majority – at least 85% – of the unmet supply in Grade R in schools cannot be addressed simply by extending provision to schools that do not currently offer it. Instead, this unmet supply would need to be met through expansion within schools that already provide Grade R and through continued reliance on non-school-based ELPs that register as independent schools.

Table 8: Public and independent schools that we would expect to accommodate Grade R but currently do not, and their expected capacity for Grade R

A. Number of schools with Grade 1–3 enrolment but no Grade R enrolment in 2024				B. Total first-time Grade 1 enrolment in these schools in 2024			B.2 expressed as % of first-time Grade 1s who did not attend Grade R in public schools	B.3 expressed as % of first-time Grade 1s who did not attend Grade R in public or independent schools
	1. Independent	2. Public	3. Total	1. Independent	2. Public	3. Total		
EC	12	75	87	309	1,456	1,765	11.0%	11.4%
FS	13	15	28	237	551	788	5.0%	6.8%
GP	223	43	266	5,493	6,516	12,009	9.7%	15.1%
KZN	21	57	78	477	2,644	3,121	10.0%	11.0%
LP	9	7	16	286	38	324	0.8%	5.4%
MP	29	24	53	514	2,219	2,733	14.9%	17.0%
NC	4	33	37	43	456	499	13.0%	14.1%
NW	8	15	23	86	272	358	2.7%	3.2%
WC	131	96	227	1,940	5,849	7,789	22.2%	27.0%
Total	450	365	815	9,385	20,001	29,386	11.2%	14.6%

Source: LURITS 2023–2024 data. Own calculations.

Notes: Enrolment data from only ordinary schools was used. Denominator of the calculation in column F of Table 4. Denominator of the calculation in column F of Table 7.

To what extent have non-school-based ELPs absorbed Grade R enrolment?

A question that Gustafsson (2024) leaves unanswered is how many of the Grade 1 learners in public schools who did not attend Grade R in public schools attended Grade R programmes in non-school-based settings or ELPs. In this section, we provide an estimate by triangulating findings from SASE 2022 data on any Grade R attendance against our estimates of the number of Grade 1 learners who did not attend Grade R in a school.

Our starting point is to use the number of first-time Grade 1s in 2024 as identified earlier (Table 7). We multiply this by the percentage of Grade 3/6 learners in SASE (2022) having ever attended Grade R to get an estimate of the number of first-time Grade 1s that attended school-based or non-school-based Grade R. Then we subtract from this the number of first-time Grade 1s in schools that did not attend Grade R in a public or independent school. The remainder – reported in column 6 of Table 9 – reflects how many Grade 1s attend Grade R in non-school-based settings.

These estimates of Grade R ELP attendance are far from exact yet can shed light on important patterns. Importantly, Grade R coverage may have improved between when the SASE 2022 Grade 3 and 6 cohorts attended Grade R (2016 and 2019) and the year 2023 when the 2024 Grade 1 cohort attended Grade R. This timing mismatch may also account for the negative ELP Grade R estimates for Limpopo province.

Nationally, we estimate that about 99,000 first-time Grade 1 learners in the public school system in 2024 attended Grade

R in ELPs (see Table 9). This represents about 57% of the estimated shortfall in Grade R places in schools (173,000) for Grade 1 learners who will attend public schools.

If our population of interest is first-time Grade 1 learners in public or independent schools in 2024, nationally about 123,000 of these learners may have attended Grade R in ELPs (see Table 10).²⁴ This represents about 61% of the estimated shortfall (201,000) in Grade R places in schools for Grade 1 learners who will attend public or independent schools.

Table 9: Estimating how many learners in public schools attend non-school-based Grade R (e.g. in ELPs), by province

	1	2	3	4	5	6
	# of first-time Grade 1s in public schools in 2024	# of first-time Grade 1s in public schools who did not attend any school-based Grade R	% of first-time Grade 1s in public schools in 2024 that attended any school-based Grade R	% of Grade 3/6 learners in public schools that attended Grade R in SASE 2022	Possible: % attending ELPs	Possible number of Grade Rs in ELPs (Col 1*(Col4–Col3)
EC	114,542	13,045	88.6%	94.1%	5.5%	6,324
FS	47,133	11,060	76.5%	89.3%	12.8%	6,038
GP	178,315	64,953	63.6%	90.3%	26.7%	47,619
KZN	190,743	26,186	86.3%	94.5%	8.2%	15,609
LP	119,968	4,112	96.6%	89.4%	-7.2%	-8,584
MP	80,377	14,810	81.6%	93.0%	11.4%	9,146
NC	22,435	3,352	85.1%	90.0%	5.0%	1,116
NW	62,068	9,915	84.0%	85.9%	1.9%	1,167
WC	92,217	26,081	71.7%	92.4%	20.6%	19,029
SA	907,948	173,400	80.9%	91.8%	10.9%	99,233

Source: LURITS (see Table 4) and SASE 2022. Own calculations.

Notes: Only enrolments in ordinary schools are included in calculations. *Number of Grade R learners in ELPs = Col 1 X (Col4–Col3)

Almost half (49%) of all non-school-based Grade R attendance occurs in Gauteng and a further 17% in the Western Cape (see Table 10). Together, Gauteng and the Western Cape account for two-thirds of non-school-based Grade R attendance.

Mirroring the patterns in Grade R non-attendance in schools, it is largely the middle class that attends Grade R in non-school-based settings. We estimate that over a third (35%) of first-time Grade 1 learners in Quintile 5 schools had attended Grade R in non-school-based environments (see Table 10), compared with 18% of Quintile 4 Grade 1 learners, 9% of Quintile 3 Grade 1 learners, 5% of Quintile 2 Grade 1 learners, and just 3% of Grade 1 learners in Quintile 1 settings.

In absolute terms, roughly 66,000 first-time Grade 1 learners in Quintile 4 and 5 schools attended Grade R in non-school-based settings (see Table 10), of whom about 35,000 were in Gauteng. By comparison, fewer than 37,000 Grade 1 learners nationally in Quintile 1–3 public schools attended Grade R in non-school-based settings.

By implication, the potential adverse effect of any Grade R enrolment substitution from ELPs to school-based Grade R is unlikely to have a substantial impact on ELPs in poorer settings. However, the impact on ELPs in middle-class settings is likely to be significant, with Gauteng likely to be most affected if ELPs providing Grade R are not registered as schools.

Table 10: Estimating how many first-time Grade 1 learners in any public or independent schools attended non-school-based Grade R (e.g. in ELPs), by province

	1	2	3	4	5	6
	# of first-time Grade 1s in any school in 2024	# of first-time Grade 1s in any school who did not attend any school-based Grade R	% of first-time Grade 1s in any school in 2024 who attended school-based Grade R	% of Grade 3 and 6 learners in any school who attended Grade R in SASE 2022	Possible % attending Grade R in ELPs	Possible number of Grade Rs in ELPs (Col 1*(Col4–Col3)
EC	122,482	15,466	87.4%	94.3%	6.9%	8,443
FS	48,662	11,620	76.1%	89.4%	13.3%	6,457
GP	206,365	79,723	61.4%	90.8%	29.5%	60,798
KZN	196,216	28,286	85.6%	94.5%	8.9%	17,482
LP	128,365	6,025	95.3%	89.7%	-5.6%	-7,211
MP	83,592	16,104	80.7%	93.0%	12.3%	10,287
NC	23,068	3,527	84.7%	90.1%	5.4%	1,241
NW	65,070	11,316	82.6%	86.0%	3.4%	2,203
WC	98,272	28,820	70.7%	92.4%	21.7%	21,331
SA	972,267	201,075	79.3%	92.0%	12.7%	123,156

Source: LURITS 2023–2024 (see Table 4 and Table A3) and SASE 2022. Own calculations.

Notes: Only enrolments in ordinary schools are included in calculations. *Number = Col 1*(Col4–Col3) **Totals are not a sum of the quintile values in this table but derived from national analyses because quintiles are occasionally missing for some schools, and data linking errors are more pronounced for independent schools.

Table 11: Estimating how many first-time Grade 1 learners in public and independent schools attended non-school-based Grade R (e.g. in ELPs), by quintile

	1	2	3	4	5	6
	# of first-time Grade 1s in all schools in 2024	# of first-time Grade 1s who did not attend Grade R in a school	% of first-time Grade 1s in all schools in 2024 that attended Grade R in a school	% of Grade 3 and 6 learners in all schools attending Grade R in SASE 2022	Possible % attending Grade R in ELP	Possible number attending Grade R in an ELP (Col 1*(Col4–Col3)
Quintile 1	216,295	27,011	87.5%	90.3%	2.8%	6,122
Quintile 2	207,739	28,945	86.1%	91.3%	5.2%	10,803
Quintile 3	233,499	38,604	83.5%	92.0%	8.6%	20,033
Quintile 4	116,179	30,543	73.7%	91.3%	17.5%	20,384
Quintile 5	131,165	51,402	60.8%	95.3%	34.5%	45,195
Missing	3,450					
Total public**	907,948	173,400	80.9%	91.8%	10.9%	99,233
Total public + independ-ent**	972,267	201,075	79.3%	92.0%	12.7%	123,156

Source: LURITS 2023–2024 (see Table 4 and Table A3) and SASE 2022. Own calculations.

Notes: Only enrolments in ordinary schools are included in calculations. *Number = Col 1*(Col4–Col3) **Totals are not a sum of the quintile values in this table but derived from national analyses because quintiles are occasionally missing for some schools, and data linking errors are more pronounced for independent schools.

A supply-side perspective: identifying ELPs with Grade R classes

The Thrive by Five Index 2024 adds a supply-side perspective to the analysis, providing a nationally representative picture of ELPs from the supply side, including whether programmes offer Grade R classes, whether these Grade R classes are registered with the Department of Basic Education, and the broader enrolment and funding structures in ELPs. In particular, the data highlight the substantial share of ELPs offering unregistered Grade R classes, thereby helping to identify the segments of the sector most vulnerable to potential enrolment displacement under the BELA provisions.

Among a nationally and provincially representative sample of ELPs, 26.5% (95% confidence interval: 24%–29%) of principals reported that their ELP had Grade R classes (see Table 12). However, among these ELPs with Grade R classes, only 48% (95% confidence interval: 42%–54%) had registered these classes with the Department of Basic Education (DBE). Nationally, this implies that approximately 14% of all ELPs (95% confidence interval: 11.6%–15.7%) offer Grade R classes that are not registered with the DBE. These programmes are likely to be the most vulnerable to the displacement of Grade R enrolment arising from the new BELA provisions.

Table 12: Prevalence of ELPs offering Grade R classes and whether they are registered with the Department of Basic Education, Thrive by Five Index 2024

ELP has Grade R class(es) (%)				
	No	Yes	Total	N
EC	91.28 (1.96)	8.72 (1.96)	100	164
FS	67.1 (5.37)	32.9 (5.37)	100	111
GP	38.51 (3.25)	61.49 (3.25)	100	275
KZN	86.32 (2.32)	13.68 (2.32)	100	187
LP	93.91 (2.14)	6.092 (2.14)	100	169
MP	87.69 (2.99)	12.31 (2.99)	100	121
NC	82.25 (4.08)	17.75 (4.08)	100	104
NW	75.2 (6.43)	24.8 (6.43)	100	112
WC	70.58 (4.64)	29.42 (4.64)	100	145
National	73.51 (1.25)	26.49 (1.25)	100	1,388
Of those with Grade R classes, the percentage of classes registered with DBE (%)				
GP	63.17 (4.25)	36.83 (4.25)	100	162
National	51.94 (3.10)	48.06 (3.10)	100	399

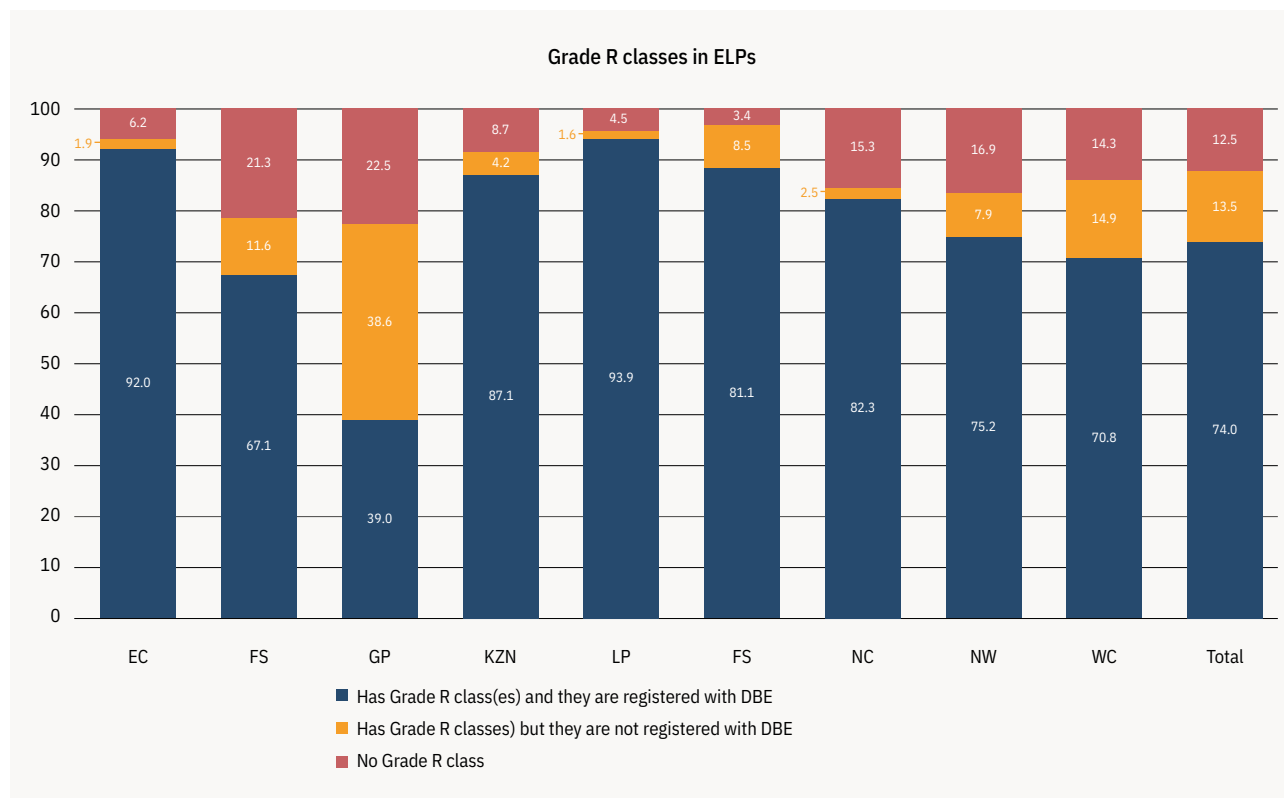
Source: Thrive by Five Index 2024, principal questionnaire. Own calculations.

Notes: ELP weights applied. Standard errors in parentheses. Principal was asked "Do you have Grade R classes?" and "Are the Grade R classes registered with the Department of Basic Education?". The standard errors in parentheses are large for most provinces. Due to large standard errors, only registration statistics by province are shown for Gauteng, which has larger sample sizes.

Table 12 and Figure 8 also highlight the particularly high prevalence of Grade R provision in Gauteng, where as many as 62% of ELPs report offering Grade R classes. However, only around 36% of these Gauteng ELPs report having registered their Grade R classes with the DBE. Overall, an estimated 39%

of all ELPs in Gauteng (95% confidence interval: 32%–45%) are reported as offering unregistered Grade R classes. These programmes face substantial financial risk should they lose Grade R enrolment.

Figure 8: Prevalence of Grade R classes offered in ELPs, and whether they are registered with the Department of Basic Education, Thrive by Five Index 2024



Source: Thrive by Five Index 2024, principal questionnaire. Own calculations.

Using the Thrive by Five data, ELPs charging higher fees are more likely to offer Grade R, consistent with Grade R attendance outside school being concentrated among middle- to upper-income groups. For example, as seen in Appendix Table A4, the prevalence of Grade R classes was just 4% among ELPs charging fees below the 25th user fee percentile (R150 per month), 37% among those charging fees between the 50th and 75th user fee percentiles (R300–R600 per month), and 58% among ELPs charging fees between the 75th and 90th percentiles (R600–R1,680 per month), while almost two-thirds of ELPs charging fees at or above the 90th percentile (R1,680 per month) had Grade R classes.

How plausible is the estimate of 123,000 children enrolled in Grade R outside schools?

The Thrive by Five Index 2024 data provide estimates of total enrolment in ELPs, but do not report the number of children specifically enrolled in Grade R. However, by disaggregating enrolment estimates according to whether programmes offer Grade R classes (Table 13), it is possible to assess whether the estimate of approximately 123,000 Grade R learners in ELPs, identified in Table 12 above, appears plausible.

Table 13 indicates that total enrolment in ELPs offering a Grade R class is approximately 533,000 children. On this basis, Grade R learners in ELPs – at 123,000 – would account for just under a quarter of total enrolment in ELPs offering Grade R, suggesting that the estimate is plausible.

Table 13: Total enrolment in ELPs by whether they offer Grade R classes, Thrive by Five Index 2024.

	Total enrolment	SE	95% lower CI	95% upper CI
No Grade R class	940,934	28,194	885,604	996,264
Has Grade R class	533,377	28,155	478,013	588,741
All ELPs	1,474,311	40,817	1,394,238	1,554,383

Source: Thrive by Five Index 2024. Own calculations.

Notes: Weighted using ELP weight. Estimates use the enrolment variable “pri_count_register_all” in the Thrive by Five Index 2024.

As a second sense check on whether the estimate of 123,000 children attending Grade R in an ELP is plausible, we draw on the 2024 General Household Survey (GHS). The GHS asks whether children aged 0–6 years attend different types of early learning facilities.

Since 2023, the survey has revised the response categories for the ECD-related question (“Which of the following does person X currently attend?”) to distinguish between Grade R attendance within schools and outside schools. The two relevant response options are: “Grade R in pre-school that is not linked to a primary school” and “Grade R in pre-school that is linked to a primary school”.

Table 14: Weighted numbers of children aged 4–6 years reported as enrolled in different forms of ECD, GHS 2024

	Total	Stand-ard error	95% lower CI	95% upper CI	N	Total de-flated by 15.4%*
Grade R in pre-school that is not linked to a primary school	346,714	21,517	304,540	388,888	355	300,330
Grade R in pre-school that is linked to a primary school	978,914	32,421	915,370	1,042,459	1117	847,954
Pre-school/nursery school/Grade 00/Grade 000	149,532	14,164	121,771	177,294	144	129,528
Creche/educare centre	828,973	31,294	767,638	890,309	901	718,072
Day mother/gogo/child minder	39,540	6,971	25,877	53,202	41	34,250
Home-based play group	7,161	3,144	999	13,323	7	6,203
School (Grade 1 or 2)	744,672	29,829	686,208	803,137	849	645,049
None	509,564	26,066	458,475	560,654	547	441,394

Source: GHS 2024. Own calculations; weighted.

Notes: The GHS asks of all household members aged 0–6 years, “Which of the following does person X currently attend?”: Enrolment totals in Grades 2–5 in the GHS are overestimated by this amount relative to enrolment totals in DBE administrative school records (i.e. EMIS, as seen in *School Realities*, 2024).

Among children aged 4–6 years, the weighted GHS estimates suggest that approximately 347,000 attended Grade R in a pre-school not linked to a primary school (first row, Table 14). However, there is considerable confusion among respondents about what constitutes Grade R in and outside a school. For example, of the 5–6-year-olds who were identified as attending Grade R ‘not linked’ to a primary school, 50% later responded in the questionnaire that the child was attending school, not pre-school. If we restrict the estimates of children aged 4–6 years who are in pre-school not linked to a school and do not later identify as being in a school, the GHS estimate is closer to 227,000 children attending non-school-based Grade R.

The GHS also appears to overestimate the child population and thus enrolment numbers. For example, relative to school administrative records, GHS enrolment totals for Grades 2–5 are approximately 15.4% higher. Applying this 15.4% adjustment factor, the GHS estimate for children aged 4–6 years enrolled in Grade R in a “pre-school linked to a primary

school” falls from 979,000 to around 850,000 (2nd row of Table 14) – much closer to the 830,000 learners recorded in EMIS as enrolled in public and independent school Grade R classes in 2024 (*School Realities*, 2024).

Applying the same adjustment to the estimate of Grade R enrolment outside schools suggests that approximately 300,000 children aged 4–6 years were enrolled in “Grade R in pre-school that is not linked to a primary school” in 2024. If we exclude those later recorded as being in school, the estimate is closer to 200,000 when deflated by 15.4%. Against these GHS benchmarks, our estimate of 123,000 children enrolled in Grade R outside schools appears conservative.

Estimating financial losses in ELPs from Grade R displacement

Estimating the potential financial losses to ELPs resulting from the displacement of Grade R enrolment into schools is

challenging given current data limitations. No single dataset provides information on both the number of Grade R learners enrolled in ELPs and the financial characteristics of those programmes. However, by combining estimates of Grade R enrolment outside schools derived from LURITS and SASE with information from the Thrive by Five Index 2024, it is possible to generate indicative estimates of the potential scale of these losses.

The financial loss estimates presented in Table 16 draw on several key inputs from the Thrive by Five Index 2024 data, disaggregated according to whether ELPs offer Grade R classes and whether those classes are registered with the Department of Basic Education (DBE). These inputs include total enrolment in ELPs, reported user fees charged for children aged 4–6 years, and the proportion of enrolled children for whom ECD subsidies are received. The estimated 123,000 Grade R learners enrolled in ELPs are taken from Table 11. Given the absence of direct information on Grade

R enrolment within ELPs, several assumptions are required. Most importantly, it is assumed that Grade R learners are distributed across ELPs in proportion to the enrolment patterns observed among ELPs with DBE-registered and unregistered Grade R classes.

Under these assumptions, we estimate that, if all children enrolled in Grade R classes in ELPs pay fees for 11 months of the year, Grade R-related fee income would amount to approximately R1 billion annually across the sector. In addition, Grade R learners who are likely to qualify for ECD subsidies but attend ELPs without registered Grade R programmes account for an estimated R37 million in annual ECD subsidy income. ELPs with registered Grade R programmes may not receive ECD subsidies for qualifying Grade R learners; but if they do receive the ECD subsidy for these Grade R learners, it amounts to an estimated R158 million in annual ECD subsidy income.

Table 15: Estimated losses from fees and ELP subsidies associated with Grade R learners moving out of ELPs.

Row		No Grade R class	Has Grade R class(es) but not registered with DBE	Has Grade R class(es) & registered with DBE	Total	Calculation
A	Total enrolment in ELPs (weighted estimate from Thrive by Five Index 2024)	940,934	219,144	300,078	1,474,311	TbF 2024, own calculation
B	Possible enrolment share of Grade Rs across ELPs with registered and not registered* Grade R classes		42.2%	57.8%	100.0%	
C	Grade R enrolment estimate in ELPs (LURITS-SASE)		51,979	71,176	123,156	Table 12 total * B
D	Grade R enrolment share		23.7%	23.7%	8.4%	C / A
E	Median fee in these ELPs	R200	R500	R500	R250	TbF 2024, own calculation
F	Fees for 11 months if all learners pay fees (thousands)	R3,079,502	R1,937,145	R2,677,784	R7,870,169	TbF 2024, own calculation
G	Fees from Grade Rs for 11 months if all pay fees (thousands)		R459,476	R635,150	R1,094,626	D x F
H	Share of all enrolled children receiving subsidy	37.3%	11.2%	35.1%	33.2%	TbF 2024, own calculation
I	Estimated annual ELP subsidy received at R24 per child per day (thousands)	R2,222,081	R155,331	R667,556	R3,104,100	A * H * R24 * 264 days / 1000
J	Estimated annual ELP subsidy received for Grade Rs at R24 per child per day (thousands)		R36,843	R158,339	R195,183	C * H * R24 * 264days / 1000
K	Total annual income from fees & ELP subsidies for all enrolled children (thousands)	R5,301,583	R2,092,476	R3,345,340	R10,974,269	F + I
L	Total annual income from fees & ELP subsidies associated with Grade Rs (thousands) – option 1		R496,320	R793,490	R1,289,809	G + J
M	Total annual income from fees & ELP subsidies associated with Grade Rs (thousands) – option 2		R496,320	R635,150	R1,131,470	
N	Share of total annual income from fees & ELP subsidies (option 1) for all enrolled children		23.7%	23.7%	11.8%	L / K

Notes:

B – This assumes that the share of Grade R enrolment across programmes with Grade R classes registered and not registered with the DBE mirrors the share of all children enrolled across these two programme types in the Thrive by Five Index 2024 (TbF 2024).

F – The per-child monthly fees for each ELP in the Thrive by Five Index 2024 were multiplied by total enrolment and 11 months. The SVY command, applying ELP weights, was used to estimate total fees for all programmes in the Thrive by Five Index 2024. The value in the total column is based on an estimate from Stata for 1,389 programmes, not the 1,379 ELPs reflected across the row subtotals.

G – Total column sums across the row

H – Although 44% of ELPs in the Thrive by Five Index 2024 receive subsidies, not all children in each programme receive the subsidy. Only 33% of all enrolled children receive a subsidy.

J – This assumes that the share of Grade R learners receiving a subsidy is the same as the share of all children enrolled in the Thrive by Five Index 2024 ELPs receiving an ELP subsidy. The total column sums along the row.

Taken together, Grade R enrolment could contribute as much as R1.1 billion to R1.3 billion per year in user fees and ECD subsidies to the ELP sector. This represents approximately 10–12% of the total income that all ELPs may derive from user fees and ECD subsidies. These estimates may still understate the broader financial importance of Grade R to the ELP sector. The World Bank Group (2022) reported that an additional R279 million from the national budget was spent on "Grade R in ECD programmes" in 2021/22.

The financial consequences are unlikely to be evenly distributed across the sector. ELPs operating Grade R classes that are not registered with the DBE are likely to be particularly vulnerable, as they may have limited opportunities to retain Grade R enrolment under the new legislative arrangements. We estimate that these programmes stand to lose approximately R500 million annually in Grade R-related user fee and ECD subsidy income.

Even ELPs with DBE-registered Grade R classes may face substantial financial pressures. Should these programmes be required to operate as independent schools, they may incur significant compliance costs. In addition, requirements to employ more highly qualified Grade R practitioners could increase staffing costs substantially (see discussion in Section 2).

Consequently, the financial implications of the BELA provisions may extend beyond the direct loss of enrolment to include higher operating costs for those ELPs that continue to provide Grade R.

5. Discussion

By the time Grade R was made compulsory in 2024, Grade R participation was already widespread, supported through a combination of school and ELP provision. At this point, the central policy challenge for Grade R had shifted from a general expansion of Grade R access to ensuring stable participation, targeting provision in undersupplied poorer communities and improving quality. Rather than targeting access improvements or shaping quality improvements in Grade R, the introduction of BELA legislation, which explicitly locates mandatory Grade R in schools, introduced new challenges for the education system and ELPs.

While the long-run expansion of Grade R in schools was evident, growth was concentrated in the 2000s. Grade R coverage – through a combination of school- and non-school-

based Grade R provision – was already high among the cohort reaching Grade 6 in 2022²⁵ with 92% of Grade 6 learners in SASE 2022 reported as having attended Grade R. Coverage was higher by about 4–5 percentage points among Quintile 5 learners compared to Quintile 1 learners, yet still as high as 90% among Quintile 1 learners.

Attendance at Grade R outside schools and the remaining Grade R access gap

Around the time compulsory Grade R was legislated, a substantial share of the gap in Grade R provision in schools was explained by attendance at Grade R outside schools – in ELPs. Of the population of first-time Grade 1 learners in public and independent schools (about 972,000 learners in 2024), around 123,000 attended Grade R outside schools, representing about 61% of the 201,000 learners not covered in Grade R in public and independent schools. This estimate of 123,000 children enrolled in Grade R outside schools is conservative compared with the 200,000–300,000 children aged 4–6 years in the 2024 General Household Survey reported as being in 'Grade R in pre-primary not linked to a school'.

The substantial Grade R enrolment numbers outside schools may reflect a lack of available Grade R spaces in schools, but may also reflect parents' preferences. Parents may have continued to choose Grade R in ELPs over schools for many reasons, including the convenience of ECD centres being located closer to home, established relationships of trust between caregivers and practitioners, the play-based nature of Grade R programming in ECD centres and the greater flexibility of operating hours, which allows working parents to drop children off earlier and collect them later (Metelerkamp, 2026b). This may be a particularly important element in provinces such as Gauteng with higher employment rates. BELA fails to recognise these important realities.

This oversight reflects a broader issue of the vulnerability of Grade R to poor planning decisions given its position in the education system. It is the point of overlap between early childhood education and the Foundation Phase, requiring but not necessarily receiving the coordinated attention of both ECD and Foundation Phase planners.

The actual gap in Grade R provision – i.e. the number of learners who did not attend Grade R in schools or ELPs – is about 78,000 learners, representing 8% of the total first-time 2024 Grade 1 cohort in public and independent schools.

Implications for the school system

Legislating compulsory provision of Grade R in schools now places undue pressure on the school system to accommodate more than twice as many learners in Grade R in public schools – a large proportion of whom were able to afford to pay for Grade R provision in ELPs.

Approximately 173,400 first-time Grade 1 learners in public schools in 2024 had not attended Grade R in a school (either public or independent). Assuming a Grade R class size of 30, this represents about 5,780 Grade R classes that would need to be added to the public school system to accommodate these learners.

However, the analysis indicates that the gaps in school-based provision are concentrated among learners from middle- or high-income households, who attend Grade 1 in Quintile 4 and 5 schools, rather than from the poorest households. First-time Grade 1 learners in Quintile 4 and 5 schools nationally account for almost half (47%) of those who did not attend Grade R in a school (either public or independent). Gauteng Grade 1 learners who attend Quintile 4 and 5 schools account for almost a quarter (24%) of first-time Grade 1 learners nationally in public schools who did not attend Grade R in a school.

Implications for ELPs

Mirroring the gaps in public school provision, we found that, of the 99,000 first-time Grade 1 learners in public schools who attended Grade R outside schools, two-thirds (about 66,000) attended Grade 1 in Quintile 4 and 5 schools. This suggests that Grade R attendance outside schools is concentrated among learners from middle- to higher-income households.

Therefore, the potential displacement of Grade R learners from ELPs to schools will predominantly affect ELPs serving middle- to upper-income households, while those serving learners from poorer households would be less exposed. This is consistent with findings from the Thrive by Five Index 2024, where, among a representative sample of 1,388 ELPs, Grade R classes are substantially more common in higher fee-charging ELPs than in lower fee-charging ELPs (Giese et al., 2025, p. 30).

Because much of this provision occurs in relatively better-resourced settings, many ELPs may be reasonably well positioned to transition into formally registered schools if

appropriately supported by provincial education departments (PEDs).

Rather than indicating a generalised risk of destabilisation across the ELP sector, the findings point to the need for coordinated planning and support to manage the transition of Grade R provision within a mixed provisioning system. This would help to avoid spending significant resources on building Grade R classes to accommodate the middle class.

It also means that provinces, particularly Gauteng, would need to spend scarce time and resources on managing a large administrative process to register ELP Grade R programmes as independent schools. Almost half (49%) of all non-school-based Grade R attendance occurs in Gauteng. Furthermore, about 39% of ELPs in Gauteng were reported as offering unregistered Grade R classes, according to the Thrive by Five Index 2024.

Despite the costs involved, in areas where there is limited capacity to absorb Grade R learners in public schools, it is incumbent on PEDs to support this process. Adding Grade R to schools that had Grade 1–3 enrolments but no Grade R enrolments in 2024 (about 365 public schools) would address only a small share of the shortfall in Grade R spaces in schools, accommodating just an additional 20,000 Grade R learners in public schools. Most of the additional capacity for Grade R enrolment in schools would need to come from expanding provision in schools that already offer Grade R or drawing on provision outside the school system

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However, if ELPs offering quality Grade R do not register as schools, the annual financial losses to the national ELP system – through lost user fees and ECD subsidies – could be substantial.

According to the Thrive by Five Index 2024, 26.5% of principals in ELPs reported that their programme had Grade R classes. Based on our estimate of 123,000 learners in ELPs, Grade R-related user fee and ECD subsidy income could be as much as R1.3 billion annually. Approximately 14% of these Grade R classes were not registered with the DBE. It is these programmes that are most likely to be financially vulnerable to the displacement of Grade R enrolment arising from the new BELA provisions, with an estimated R500 million in annual income at risk.

Another issue that we have not given much attention to in this paper is whether the subsidies and user fees of older

children could cross-subsidise the costs of serving younger children. More research is needed to determine whether ELP providers would be forced to raise fees for younger children, constraining their access, if older children are displaced from ELPs.

The extent of these impacts on ELPs will be shaped by ELPs' existing income sources and levels (e.g. user fees, existing subsidy receipt and how it is allocated across food, salaries and other factors) and cost structures (especially salaries paid to ECD and Grade R practitioners). Impacts will also depend on the extent to which ELPs adhere to child-to-practitioner ratios in the Children's Act and whether they register as schools offering Grade R.

The direction of the impacts is not entirely clear but will likely be socio-economically and geographically stratified. Closer monitoring of the impacts on the sector is necessary, especially if the impacts of displacing Grade R learners from ELPs could be at odds with broader national plans to expand access to early learning for younger children.

Implications for future pre-Grade R provision

These findings also offer useful lessons for conceptualising pre-Grade R provision. The National Development Plan (2011) suggested introducing pre-Grade R, and more recent education plans have prioritised strengthening and expanding access to quality early childhood care and education for 3- and 4-year-olds. What is clear from this paper is that any pre-Grade R plans should place provision within the existing early learning programme (ELP) system – not in schools.

Given both the significant implementation challenges associated with accommodating all Grade R learners in

schools and the financial losses for the ELP sector from displacing more children from ELPs, introducing a compulsory pre-Grade R year in schools would not only risk further destabilising the ELP sector, but would also place South Africa outside prevailing global norms in early childhood education policy.

6. Conclusion

Ultimately, the challenge facing South Africa is not simply to move Grade R into schools, but to ensure that every child has access to a quality Grade R programme.

The evidence presented in this paper shows that the apparent shortfall in school-based Grade R provision substantially overstates the remaining access gap, because ELPs are already serving many children outside school-based Grade R.

Implementing BELA without recognising this existing mixed system risks redirecting scarce public resources towards replacing functioning provision, while imposing potentially significant costs on the ELP sector.

A more effective approach would preserve and strengthen quality Grade R provision in ELPs where it already exists, support appropriate programmes to meet registration requirements, and concentrate new public investment on the considerably smaller group of children and communities where Grade R access remains genuinely constrained.

As South Africa considers the future expansion of early learning, the broader lesson is important: policy should build on, rather than displace, the systems of provision that have already helped achieve near-universal participation.

Endnotes

¹ Broadly, ELPs are environments outside the home in which early childhood care and education activities take place. They may include early childhood development (ECD) centres or pre-primary schools, playgroups, or day-mothers

² We refer to an upper bound here because some ELPs could register to become schools.

³ The analysis only focused on ordinary schools as distinct from special schools.

⁴ A concise set of questions was distributed to a network of pro bono law firms who provided research assistance to the Right to Education Initiative (OECD, 2021, p57).

⁵ These four countries include Togo, Kenya, Ghana, Equatorial Guinea. At the time of the UNESCO (2021) analysis, South Africa had not yet implemented such legislation.

⁶ Across OECD countries, around half of children in early childhood educational development programmes and roughly one-third of those in pre-primary education attend either government-dependent or independent private institutions (OECD, 2023). However, the extent of private enrolment in pre-primary education varies widely, ranging from less than 4% in countries such as Bulgaria and the Czech Republic to nearly universal provision in Ireland and New Zealand (OECD, 2023).

⁷ Section 3 of the South African Schools Act goes on to impose penalties for parents who fail, without just cause, to ensure their child attends school. This would now apply to Grade R attendance.

⁸ What were previously termed public pre-primary schools (pre-1994) were also asked to join public schools.

⁹ <https://www.education.gov.za/ArchivedDocuments/ArchivedArticles/PathwaysforGradeRTeachers.aspx>

¹⁰ In addition, provincial education departments (PEDs) have been encouraged to appoint qualified Grade R teachers into funded vacant posts or to convert temporary Grade R teaching positions into permanent appointments in line with ELRC Resolution 2 of 2024.

¹¹ “The per learner cost determined by the PED must cover the full cost of a basic package of inputs. This basic package of inputs must include the cost of an educator working as an ECD practitioner, teaching a class of a size deemed reasonable by the PED, as well as non-personnel recurrent inputs required by the Grade R learners such as learner support materials, minor building repairs, utilities such as electricity and water, administrative support, copying of materials and media collections” (Department of Education, 2008, section 208).

¹² If Grade R practitioners are paid at the minimum wage in ELPs, it may have been financially viable for ELPs to accommodate Grade R learners using ELP subsidies, even without charging user fees. However, we have not considered the requirement for an additional assistant per practitioner in ECD programmes, which further increases staff costs.

¹³ After paying for a salary, 50% of the Grade R per-learner subsidy to independent schools should be spent on LTSM, and the remaining 50% can go towards any operational costs, providing some discretionary finance for an ELP registered as an independent school (Western Cape Government, 2026).

¹⁴ It would be interesting to consider whether for similar reasons, this could also shape provincial and socio-economic patterns of ECD coverage for younger children (for example, participation rates among those aged 3–4).

¹⁵ With almost universal coverage in primary schooling, the underlying assumption here is that Grade 1 school attendance after removing repeaters provides a good reflection of the population of all children.

¹⁶ DBE school Quintiles do not split schools into equal fifths. They rather designate the levels of funding that schools receive. Quintile 1-3 schools, typically based in less resourced areas and serving less advantaged learner communities, do not charge school fees but receive higher per learner allocations. Quintile 4 schools charge some fees and Quintile 5 schools charge higher fees but receive the lowest per learner allocations.

¹⁷ The Thrive by Five Index 2024 used a stratified, multistage sampling design to obtain a nationally and provincially representative sample of 4-year-old children (aged 50–59 months) enrolled in early learning programmes (ELPs) across South Africa. After randomly selecting ELPs within wards, eligible children within ELPs were randomly sampled, with efforts made to ensure equal representation of boys and girls. The final enrolled sample included approximately 5,000 children attending 1,388 ELPs.

¹⁸ The most recent possible year in which a Grade 6 learner in 2022 could have been in Grade R.

¹⁹ The multiple imputation process imputes Grade R attendance iteratively along with wealth status, home language, and parental living arrangements. Non-imputed values included in the imputation are gender, province, and school quintile.

²⁰ This higher proportion of Grade R learners in Gauteng in independent schools is reflective of the higher proportion of learners generally attending independent schools in Gauteng and not a peculiarity unique to Grade R. For example, of all Grade 1 to 12 learners in Gauteng in 2023, 12.8% were in independent schools compared to 3.5% in all the other provinces.

²¹ This is close to Gustafsson's (2024) estimate of 185,000 in the same year. Slight differences could arise due to differences in how data are linked across years or how duplicates are dealt with.

²² Assuming a Grade R class size of 30.

²³ It is not clear why this is the case. One possibility is that independent schools may have ELP feeder schools.

²⁴ Assuming the learners with missing school quintile information in SASE – with characteristics that resemble learners in Quintile 5 schools – are from independent schools.

²⁵ The year 2016 was the most recent possible year that a 2022 Grade 6 learner could have been in Grade R.

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Appendix

Age profile of Grade R learners in schools

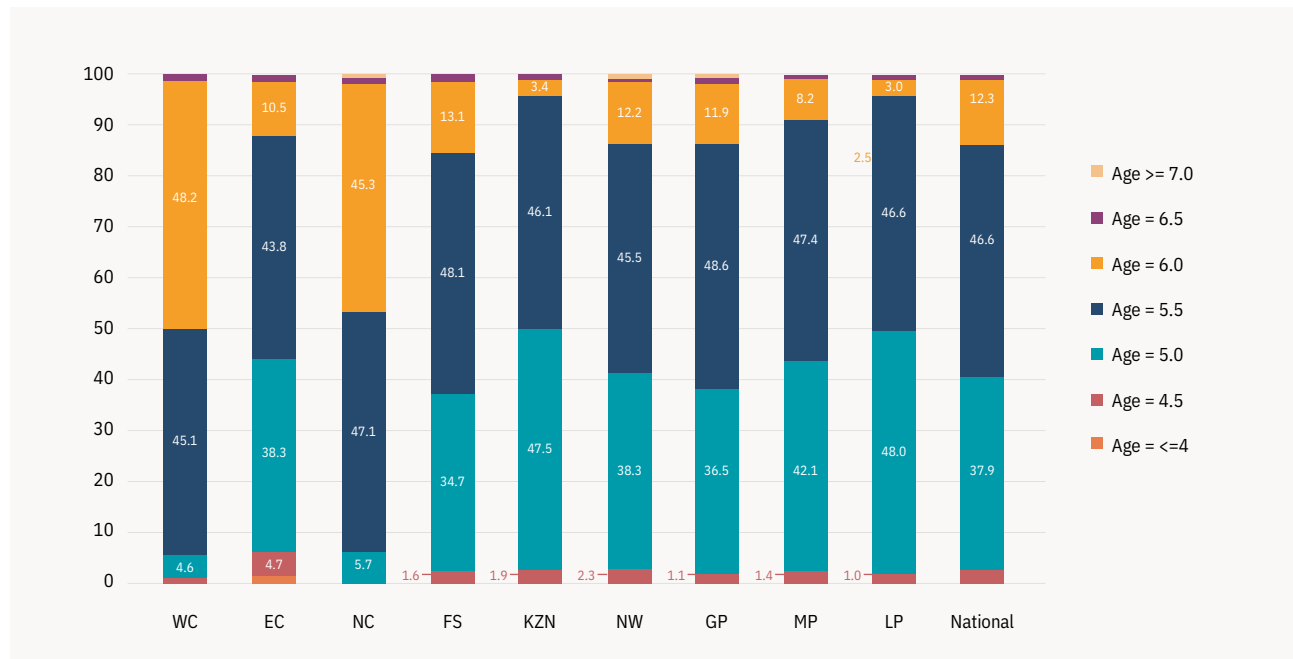
Nationally, 84% of enrolled Grade R learners in 2024 were aged 5 or 5.5 years (38% were aged 5 years and a further 46% were aged 5.5 years), 12% were aged 6 years, and less than 1.3% were aged 6.5 years or older.

Yet there were substantial differences in the age profile of Grade R learners by province. More children started Grade

R at an older age in the Western Cape and Northern Cape, compared to six other provinces. Early entry into Grade R, at the age of 4.5 years or less, is more common in the Eastern Cape, where 5.7% of Grade R learners in 2024 were aged 4.5 years or younger.

However, the problem of early entry into Grade R could be more prevalent than is reflected here, as over 16,000 learners aged 4 or 4.5 years in the 2024 LURITS data have no recorded grade.

Figure A1 Age profile of Grade R learners by province, LURITS 2024



Source: Anonymised LURITS 2024. Own calculations; public and independent schools.

Table A1: Linear probability model estimates of whether a learner was reported as attending Grade R, SASE 2022

	(1)	(2)	(3)	(4)
Learner is in Grade 6 (Ref: Grade 3)	-0.006* (0.003)	-0.005* (0.003)	-0.005* (0.003)	-0.005* (0.003)
Female	0.005** (0.002)	0.006*** (0.002)	0.007*** (0.002)	0.006*** (0.002)
FS (Ref: EC)		-0.050*** (0.006)	-0.059*** (0.006)	-0.037*** (0.008)
GP		-0.050*** (0.006)	-0.058*** (0.006)	-0.035*** (0.007)
KZN		-0.001 (0.004)	-0.002 (0.004)	0.012* (0.007)
LP		-0.044*** (0.006)	-0.047*** (0.006)	-0.028*** (0.010)
MP		-0.014*** (0.005)	-0.018*** (0.005)	-0.000 (0.008)
NC		-0.046*** (0.007)	-0.051*** (0.007)	-0.033*** (0.009)
NW		-0.081*** (0.007)	-0.086*** (0.006)	-0.057*** (0.009)
WC		-0.035*** (0.005)	-0.041*** (0.005)	-0.032*** (0.006)
Quintile 2 (Ref: Quintile 1)		0.009* (0.005)	0.006 (0.005)	0.007 (0.005)
Quintile 3		0.014*** (0.005)	0.008* (0.005)	0.012** (0.005)
Quintile 4		0.010* (0.006)	0.000 (0.006)	0.007 (0.006)
Quintile 5		0.053*** (0.005)	0.035*** (0.005)	0.046*** (0.005)
Quintile unknown (could be independent schools)		0.061*** (0.007)	0.044*** (0.007)	0.054*** (0.007)
Student family wealth index			0.002*** (0.000)	
Lives with parent(s)				0.018*** (0.003)
Constant	0.920*** (0.003)	0.930*** (0.005)	0.852*** (0.008)	0.913*** (0.008)
Observations	101,345	101,345	101,345	101,345

Source: SASE 2022. Own calculations.

Notes: Standard errors in parentheses. * $p < 0.1$; ** $p < 0.05$; *** $p < 0.01$. Reference categories are Grade 3, Eastern Cape, Quintile 1, and not living with parents. Regressions also control for home language. Multiple imputation was used for missing values.

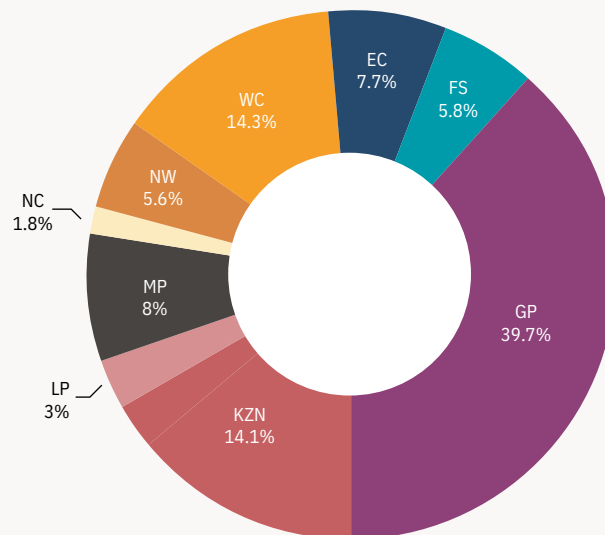
Table A2: Calculation of the number of 2023 first-time Grade 1 learners in public schools who did not attend Grade R in public schools the previous year (using LURITS 2022–2023)

	A: Gr R in 2022 in public school	B: % of A not found in any school-based Gr R or Gr 1 in 2023	C: Gr 1 in 2023 in public school	D: First-time Gr 1 in public school**	E. From Gr R in public school to Gr 1 in public school	F. First-time Gr 1 in public school who did not attend Gr R in public school**	F as a % of D
EC	105,264	4.9%	128,904	112,655	94,025	13,750	12.2%
FS	36,408	2.6%	52,080	47,456	33,996	12,535	26.4%
GP	110,150	6.4%	191,829	175,548	100,125	68,604	39.1%
KZN	159,774	4.7%	203,119	185,080	149,083	28,683	15.5%
LP	114,736	2.2%	125,128	117,961	110,324	5,126	4.3%
MP	64,402	3.3%	83,931	77,892	60,956	14,845	19.1%
NC	18,694	1.9%	25,925	22,263	17,915	4,007	18.0%
NW	50,140	2.8%	65,584	60,256	47,650	11,230	18.6%
WC	65,480	3.0%	99,632	91,152	59,795	29,480	32.3%
SA	725,048	4.0%	976,132	890,467	673,869	188,429	21.2%

Source: LURITS 2022–2023 data. Own calculations.

Notes: Only ordinary school enrolment included. **Upward adjustment using column B.

Figure A2: Provincial shares of first-time Grade 1 learners in public or independent schools in 2024 who did not attend Grade R in public or independent schools the previous year



Notes: Based on the value in column F of Table 7. Only enrolment in ordinary schools is considered.

Table A3: Schools with Grade 1–3 enrolment but no Grade R enrolment in 2022, 2023 and 2024

	Schools with Grade R	Schools without Grade R but with Grade 1–3 enrolment	Total schools with Grade 1–3 enrolment	No Grade R enrolment as a % of all schools with Grade 1–3 enrolment
2022				
Independent	1,537	407	1,944	20.9%
Public	15,684	475	16,159	2.9%
Total	17,221	882	18,103	4.9%
2023				
Independent	1,557	426	1,983	21.5%
Public	15,662	415	16,077	2.6%
Total	17,219	841	18,060	4.7%
2024				
Independent	1,619	450	2,069	21.7%
Public	15,621	365	15,986	2.3%
Total	17,240	815	18,055	4.5%

Source: LURITS 2022–2024. Own calculations.

Table A4: Percentage of ELPs offering Grade R by fees charged

Fee group	Mean	Standard error	95% confidence interval (lower)	95% confidence interval (upper)
Less than 25th percentile (<R150)	3.9%	1.1%	1.7%	6.1%
25th–49th percentile (>=150 & <R300)	13.0%	2.0%	9.1%	17.0%
50th–74th percentile (>=R300 & <R600)	36.8%	3.1%	30.7%	43.0%
75th–89th percentile (>=R600 & <R1,680)	57.8%	4.0%	49.9%	65.6%
90th percentile and above (>=R1,680)	65.8%	5.2%	55.7%	76.0%
All ELPs	26.5%	1.3%	24.0%	28.9%

Source: Thrive by Five Index 2024. Own calculations.

Notes: Fees for children aged 4–5 years were used (if available).



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