

**ASSESSMENT OF EDUCATION POLICY IN THE NEW SOUTH  
AFRICA.**



**CHIKWEMA SALATIAL**  
University of Fort Hare  
*Together in Excellence*

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**2003**

**SUPERVISOR: PROFESSOR A. RAHIM**

## **DEDICATION**

This study is dedicated to my parents Nicholas and Faustina Chikwema who gave me a gift I cherish most, the gift of life.



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There are so many people who contributed to the writing of this thesis that it is impossible to thank them all. But it is with particular gratitude that I thank Professor Aminur Rahim, my supervisor who found time from his busy schedule to read my work and give constructive criticism and advice all the time. My sincere gratitude goes to you Prof.

I owe a deep gratitude to my friends and colleagues at East Camp, the Masters students of 2002 who were never short of humour such that the two years we studied together seemed so short a time, thank you very much.

Many thanks to my parents, to whom I have dedicated this work. To them, just the thought of you at whatever time, inspires me.

Special mention must go to Zuky Mayiya, my computer genius who went a long way to making this document what it is today.

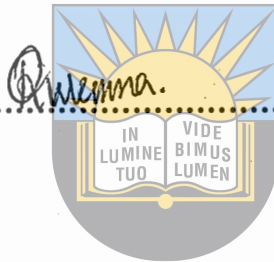


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**DECLARATION**

I HEREBY DECLARE THAT I AM THE SOLE AUTHOR OF THIS PROJECT EXCEPT WHERE STATED. I AUTHORISE THE UNIVERSITY OF FORT HARE TO LEND IT TO ANY INSTITUTIONS OR INDIVIDUALS FOR THE PURPOSE OF SCHOLARLY RESEARCH.

SIGNATURE.....



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CHAPTER ONE

1.1 INTRODUCTION

Since the inception of democracy in 1994, there has been a concerted effort to redress the inequalities of the chequered past in South Africa under the banner of transformation. Transformation can be defined as a process whereby the form, shape or nature of something is completely changed or altered (Makgoba, 1998:p.58). In the White Paper on Transformation of the Public Service, transformation is regarded as a dynamic, focussed and relatively short term on going process designed to fundamentally reshape, to change the way in which the primary function of an institution is utilised (White Paper on Transformation of Pubic Service, 1995:p.11). From the foregoing definitions and in the South African context, there is an indication that transformation is a process involving change and reorientation to reconstruct and develop all spheres of public life so as to establish enabling conditions for a flourishing democracy in South Africa (Enslin and Pendlebury, 1998). The relative short term nature gives us the grounds to evaluate transformation in South African education eight years after apartheid.

This research focuses on transformation in basic school education as promulgated in the South African Schools Act of 1996 hereafter referred to as SASA of 1996 (Department of Education, 1996). Under apartheid, education was a site of contestation and it is currently a crucial site of transformation not only for its own sake but also because it is crucial to transforming other spheres. Although there has been a lot of diverse debate about the purpose of education, there is no denying the role that education plays in the economic, cultural and political processes of societies and post-revolution states (Nasson and Samuel, 1990). This is because education occupies a crucial position in the organisation of social roles and productive relations. So crucial is this role that it is central to maintaining the existing social order and to promote varying kinds of change or mobility (Nasson and Samuel, 1990).

Therefore, in the spirit of transformation and like most other post-colonial governments the South African government intended to embrace education policies that sought to radically revise the inherited education system (Jonathan Jansen, 1990).

The new government's policy agenda in post-apartheid South Africa, that is, a record of its intentions, has been spelt out in the SASA of 1996, intended to reform and provide a basis for the plan of transforming education in South Africa. According to the Department of Education, hereafter referred to as DoE, democratic governance and equity are regarded as the most central organisational concepts framing the transformation of the post-apartheid South African education system as laid out in the South African Schools Act of 1996 (DoE, 1996 a). The attainment of democratic governance and equity in education are regarded as crucial aspects of the reform process epitomised in the SASA. Education policies in South Africa since 1994 are of paramount importance to this thesis because policies are regarded as vehicles for government intentions. From 1994, a broad range of policy frameworks and legislation have been adopted in South African education but there has been a serious lack of capacity and or other impediments that have served to undermine successful implementation (Agyeman and Evans, 2000). An assessment of the SASA 1996 policy document reveals significant limitations and points to some weaknesses of educational policy and practice in South Africa. Based on analysis of this Act and evaluation criteria for transformation, there is evidence to support the perception that South African policy on education has been inadequate in the last eight (8) years since the inception of democracy in 1992 (Enslin and Pendlebury, 1998).

At the centre of the transformation agenda is the need to reverse the results of the apartheid legacy in education (Kgobe, 2000). Transformation in South Africa can be evaluated on the criterion that considers how far inequalities in access and resources have been removed, how far the education system has been democratised, and to what extent the education system and

its leadership is representative of South Africa's people and how far the quality of education has been improved (Enslin and Pendlebury, 2000). This was the challenge for the SASA of 1996.

While policy documents have spelt out the problems and crises prevailing in the education system, practically, the problems have not been conclusively solved. The major problems were correctly identified as the presence of inequities, lack of quality in education and limited democratic participation, several policies have been instituted to try to eliminate these problems. Apartheid education was characterised by enormous inequities in terms of access, educational outcomes and resource levels. Evidently, there was patent unequal provision of educational resources in schools and an almost universal absence of quality in education.

While policy is variably defined, for this thesis policy, following Jenkins, refers to a set of interrelated decisions taken by a political actor or group of actors concerning the selection of goals and the means of achieving them within a specified situation where those decisions should in principle, be within the power of those actors to achieve (cited in Howlett and Ramesh, 1995). This, in South Africa was done under the banner of transformation whereby all facets of South African life were to be transformed to reflect the democracy that the country had now become.

While the success of new policies is debatable the difficulty of implementing a new order is not. The initiation of a new system has not been easy and the efforts to do so must be acknowledged. However it is not necessary to just jump to criticism for, as Machiavelli noted, transformation is difficult. According to Machiavelli, there is nothing more difficult to carry out, nor more doubtful of success, nor more dangerous to handle, than to initiate a new order of things because the reformer has enemies in all those who profit by the old order, and only lukewarm defenders in all those who would profit by the new order. This gives an

indication of the complex contradictions that are present in policy making especially with the intention of instituting a new order.

Some of the major policy initiatives since are, The New Policy for Education Transformation, 1996 (DoE, 1996), Language in Education Policy, 1997 (DoE, 1997), the 1998 Assessment Policy in the General Education and Training phase Grade R to Grade 9 and ABET (DoE 1998), National Norms and Standards for School Funding (DoE, 1998), the 1999 National Policy on the conduct of the Senior Certificate Exams (DoE, 1999), the 1999 Policy on HIV/AIDS for Learners and Educators in Public Schools, Students and Educators in Further Education and Training Institutions (DoE, 1999).

In 2002, there was a new policy, New Academic Policy for Programmes and Qualifications in Higher Education and a Revised National Curriculum Statement for Grade 9 (DoE, 2002). Changes have been initiated through these policies and these included a unified, national education system, more democratic system of school governance, new standards and qualifications authority, redistribution of financial and human resources and a reorientation towards outcomes based education through Curriculum 2005. However this thesis while acknowledging the importance of the rest of the policies will focus on the South African Schools Act of 1996 as I regard it as the document on which most policies in South African education are premised.

Against such a background of policy intervention the South African education system still faces major challenges and contradictions. The evidence of transformation at school level is difficult to come across. Like most other post-colonial states, and despite policies that are radically worded, post-colonial states reveal evidence of greater continuity than evidence of the radical changes envisaged in official policy documents (Jonathan Jansen, 1990). There are varied explanations for this, which the thesis will examine. However, until now there is consensus that the real issues in the crises in South African education have not been tackled.

Eight years after the independence of South Africa there are still discernible indications that the inherent problems in 1994, such as inequality and lack of quality, have not been totally eradicated and still exist. There is also indication that some new policies introduced in education have, rightfully, been evaluated and re-evaluated indicating that they were coming across new challenges that were intended to sustain the status quo or that the original challenges have not been dealt with effectively.

## **1.2 BACKGROUND TO THE STUDY**

South Africa is faced with several new challenges since becoming a constitutional democracy in 1994. Pendlebury (1998:p.333) argued that South Africa's most urgent and difficult challenge was to transform all spheres of public life so as to establish enabling conditions for a thriving civil society, which in this thesis refers to a society of human beings living together that possess rights to political, racial, legal, social freedom and equality. South Africa gained majority rule in 1994 in an election that brought the African National Congress hereafter referred to as ANC, to power. The need for a new education system was emphasised because there was an admission in the new government that problems existed in education. According to Sibusiso Bhengu, the former education minister at the time, it was necessary for a new education system to be created, a system with which all the people can identify because it serves their needs and interests. Such a system was to be founded on equity and non-discrimination, to respect diversity, honour learning and strive for excellence, was to be owned and cared for by the communities and stakeholders it serves, and was to use all the resources available to it in the most effective manner possible (DoE, 1995).

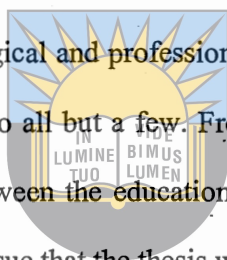
There was a crisis in South African education given the new political dispensation. For the first time in South Africa's history, a government had the mandate to plan the development of education and training system for the benefit of the country as a whole and its entire people.

The majority of the South African populace also had their own expectations of what the new education system and their 'unlimited access' to it would bring for them. This was a national task, acknowledged by the government as a fundamental priority of the Reconstruction and Development Programme (RDP). Developing the human resources of the country is both a goal of the RDP and a requirement for achieving other RDP goals. The government and the general populace were convinced that appropriate education and training could empower people to participate effectively in all the processes of democratic society, economic activity, cultural expression, and community life, and can help citizens to build a nation free of race, gender and every other form of discrimination (ANC, 1994).

New policies were needed to generally reverse the trends that dominated the troubled history of South African education. Policies are vehicles for governments to carry out their intentions and therefore when evaluating a government's work it is an evaluation of its policies (Dye, 1992). The new policies were required to build a just and equitable system to provide good quality education and training to all learners. This prompted a policy shift in the general policies of the government. With this challenge the new government was mandated to develop a development system for the benefit of all the people of South Africa.

The complex legacy of the South African past lives on in the present due to the differences in culture, values and aspirations. There is an educational legacy in South Africa and as with other basic services, the distribution and training provision in South Africa is founded in and follows a system of contrasts and paradoxes that proceeded to influence positively and negatively education policy in present South Africa. As a result and ironically, at present, South Africa has a sharp contrast in education provision. Academic results of the present education system although significantly improved, still resemble the contrasts of the legacy of the past. At present, still, South Africa has by large measure the most developed and well-resourced system of education and training on the African continent. According to the

Education White Paper, hereafter referred to as EWP of 1995, in the best resourced, highly motivated elite sector of the school system, almost all students succeed in their senior certificate and qualify for admission to higher education (Government of South Africa, EWP, 1995). However in the very same country, millions of adult South Africans are functionally illiterate, and millions of South African children are learning in school conditions which resemble those in most impoverished states (Government of South Africa, EWP 1995). It is not mere coincidence that this contrast is defined along racial division. In the largely black poorly resourced sectors in which the majority population is located a majority of students drop-out prematurely or fail senior certificate and a small minority get entrance into higher education. In fact access to technological and professional careers requiring a strong basis in Mathematics and Science is denied to all but a few. From such contrasts there is indication that there is a strong correlation between the educational status and the social status of the majority of South Africans. It is an issue that the thesis will pursue.



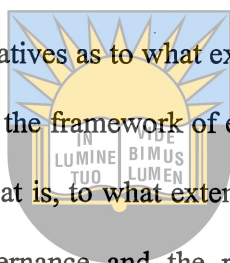
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Therefore, the historical legacy of apartheid in education that manifested itself in the lack of equity, quality and justice in education, poor democracy and participation in school governance, the relationship of education, the economy and globalisation needed rectifying. The drive to restructure education was based on the principles of equity, human rights, democracy and sustainable development. Some policies were instituted for the general advancement of education. While these policies may not be the centre of this research they provide a starting point in the efforts of analysing policy development, education reform and planning in South Africa.

### **1.3 STATEMENT OF THE PROBLEM**

The policy of separate development (apartheid) was based on segregation along the divisions of race, class, gender and ethnicity, which were tightly linked to social and economic

leadership relations. Education was not exempt from this and the SASA of 1996 was structured to correct this. Despite the massive policy and legislative interventions regarding governance, quality and equity in post apartheid South Africa, these forms of discrimination remain pervasive and tightly woven into social, economic relations in South African education. This has meant that the attainment of democratic governance, quality and equity at the school level has remained elusive. Despite several new policy initiatives to transform the education system South African education still faces complex educational contradictions as a result the evidence of transformation at school level is not easily observed. This pervasiveness calls for a rigorous research into the analytical framework that informs policy as well as the subsequent policy initiatives as to what extent the policies to attain governance and equity are conceptualised within the framework of education and the social structure and its role in attaining social justice. That is, to what extent the policies enhance the attainment of equity, quality, democratic governance and the redistribution of reproductive forces through education, which can be regarded as a transformed South African state and education system. This thesis argues that equity, democratic governance, quality and the redistribution of productive forces may not be achieved due to weaknesses in the policies and the analytical framework that informs policy. The view adopted in this thesis stated briefly, is that there are fundamental difficulties in the nature of enquiry into education policy in South Africa that have contributed into policies being ineffective against identified problems and such an analysis in this thesis begins with the SASA of 1996. This thesis argues therefore that the new policy initiatives, based on the SASA of 1996 may fail due to limitations in the theorisation of the post-apartheid state as well as the conceptualisation of the relationship between education and the political economy in a transition state like South Africa.



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#### **1.4 OBJECTIVES AND RATIONALE OF THE STUDY**

An understanding of the conceptualisation and theoretical perspectives informing policy making in South Africa is essential because it concerns questions about the value placed by policy makers on learning in the formation and transformation of South Africa and other societies. It also enables analysts to evaluate whether the stated objectives of national policy and of the constitution of the country itself are being achieved in practice and if not whether the problem may not lie in the origins of the policies themselves. This study intends to determine the critical factors of educational change and how they can serve as useful indicators for planning and decision-making. This is necessary considering that soon after elections the government adopted a transformation ideology to transform all spheres of South African life. This transformation agenda is aimed at the racial segregation of the past and is crucial in that although acknowledging that South Africa has a racial problem, it also argues that it may not only be experiencing the separate development along racial lines that characterised Apartheid but that at present, it has a new form of social stratification based on wealth.

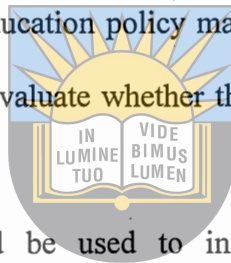
Therefore, it was important for this paper to conduct a review of education reform focussing on this characteristic of the new South Africa in the context of transformation. This stratification based on wealth has contributed to limitations in policies successfully transforming South African education. This becomes a concern for the theoretical and analytical framework for South African education policy making. This thesis will critically analyse the conceptual and analytical framework of some of the SASA of 1996 because it is this Act that determines what the major issues are and informs the direction of new policies. The overall aim of the thesis is to contribute to the policy-making framework for the new South Africa. The thesis considers that this is possible through an assessment of the post-apartheid SASA of 1996 while using critical analysis to suggest an alternative approach.

Overall, the thesis intended to provide contribution to a multi-paradigm approach to education policy analytical framework in South Africa. This is an approach to education policy making that is centred on the role of education in a transformation state that has a particular socio-economic and political situation. It is an approach that encourages education policy makers to adopt a sociological stance to education policy making given that there is a strong interlink between education and social class in any society. Therefore, it is an approach that encourages education policy makers to have a correct theorisation of the post apartheid state and hence develop education policies from this theorisation. It is hoped that through such an approach to education policy making the subsequent policies will have a far reaching effect and more success.

It is therefore essential for this thesis to conceptualise the education reform process by taking into cognisance the dynamic nature of the South African community. Research that has already been done has informed policymaking in South Africa to centre on particular issues that have been criticised as a-sociological. There has been observation that much of the educational research that has been done has ignored such issues as values and the socially dynamic nature of the South African population, which portrays clearly the different wealth levels in the country. Therefore, the policies formulated have not come up with realistic strategies of countering the pre-1994 problems. Education is a dominant social development issue that is however influenced by the social status of the people.

This work is part of a broader enquiry that has been conducted by other scholars. Policy development in South Africa has been of great concern to researchers and policy makers in South Africa. For example, Sayed Yusuf has observed that there is growing scepticism regarding education policy development in South Africa. Some critiques have hailed the new policies, while others have observed conceptual flaws, implied political betrayals and empty principles (Sayed, 2000). However, the existing debate has created in roads and opportunities

for frameworks for understanding educational change. To make an effective contribution and an innovative application of knowledge, the research thrives on investigating the weakness inherent in the formulation of education policy and practice, which not only applies in South Africa but also in most developing countries. An understanding of these weaknesses is important if correct evaluations of the implications and effects of current policies of reform and change are to be made. The analysis of such weaknesses was central to this thesis because the research concerns itself with the limitations of education policies in eliminating identified problems in the education system of South Africa. It also addresses an all-inclusive model of analytical framework in education policy making. The purpose is to contribute to informing and enabling analysts to evaluate whether the stated objectives of national policy are being achieved in practice.



The findings of this study could be used to inform policy makers, planners, and implementers of education policy by informing of the need to involve a number of paradigms and critically assessing education reform. There is need to focus on the legacy of the past to effectively deal with present injustices because in the South African situation the current problems of the education system are a product of the system of separate development during the apartheid era. This will allow policy makers to view socio-cultural factors as an influence on education reform. The findings can add to a greater awareness of challenges faced by schools in different socio-economic and socio-cultural environments. School personnel and school managers (policy implementers) will allow for the influence of the same socio-economic factors in the administration and functioning of schools. The general populace will also understand why after 1994 their access to education has not transformed into general economic prosperity. Schools, government ministries and researchers must be aware of the other external purposes that schools serve apart from the teaching and learning processes therefore, they may lobby for a reform process that that takes into account these factors.

## 1.5 RESEARCH METHODOLOGY

The research will employ the historical text based study. However, as Kaestle (1988) argues, in investigating the history of education there is no single definable method of enquiry. Historical research can be defined as the systematic and objective location, evaluation and synthesis of evidence in order to establish fact and draw conclusions about past events Cohen and Manion (1989:p.48). It is an act of reconstruction undertaken in a spirit of critical enquiry to achieve a balanced representation of a previous age. Historical research can attempt to test general theories with the empirical evidence framework. It can reflect back in important ways on social theories, confirming, refuting or modifying various theoretical statements (Kaestle, 1988). At the end, the thesis intends to advance a new interpretation or reading of existing texts and policies that must be applied to the education planning and reform.

This methodology will be applied in conjunction with a historical structural approach or historico-social methodology which seems to have strengths that make up for the limitations of other methods stated below. This historico-social approach assumes that to examine a social phenomenon such as education policy development there is need for a structural and development holism. Structural analysis observes the different structures in society, how they are related to one another and the particular position and roles that exist in different structures as well as the implication of structure on the social relations of the people. It also allows an examination of how people contribute in the reproduction of social structures in society consciously or otherwise. This is essential for this thesis because education is strongly interconnected with the social structure.

Structures are used here to refer to the sets of internally related social objects like the international division of labour but also small ones at the interpersonal and personal levels (Sayer, 1992). Within the social structures there are particular positions associated with certain roles. Therefore, while education transformation can occur in society as is noted, it

does not necessarily transform the social structures (Sayer, 1992). The structural approach will show how changes in South African education may not necessarily lead to transformation of certain structures.

## **1.6 RESEARCH DESIGN**

Historical research entails identification and limitation of a research problem or an area of study. At times, it involves formulation of a hypothesis, collection, organisation, verification, validation, analysis and collection of data. Writing of a research report follows the testing of the hypothesis (Cohen and Manion, 1980:p.48). This sequence facilitates understanding of the past, giving its relevance to the present and the future. For this research an analysis of the conceptualisation of education policy in transformation South Africa and ideological inclinations of transformation states helps unearth the strengths and the shortcomings of the current policy making process given the post-apartheid context of South Africa. The critical enquiry that this research intends to conduct is done through an inquiry into historical theoretical texts that focus on the sociological foundations of education and of society. The theoretical foundations allow the researcher to conduct a sociological enquiry into the status quo so as to get solutions to the present problems.

The main difference of this research method in contrast to other methods of research is that it does not rely on experimental-objective methods of data collection and analysis (Adams and Schvaneveldt, 1991). The essence of historical research is to interpret given facts. Historical research does not undermine the importance of data interpretation but is rather central to it. It is also relevant to point out that in a study of any seemingly random events inevitably, a pattern can be observed that ties together these events and meaning given to these events (Leedy and Omrod, 1985). Hence, in a study of seemingly random policy initiatives the assessment revealed that the theoretical weaknesses are characteristic of various different

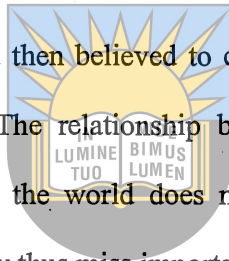
policies. The researcher is therefore not a mere narrator of policy features but a presenter of factually supported rationale to explain why these policies are likely to fail in achieving the establishment of equity, quality and democratic governance in schools. It is for these attributes that historical research has been adopted as the research method for this research.

The study does not make use of experimental or case study designs that rely on survey data but relied on information based on social history, archival materials and theory. This information was obtained from both primary and secondary sources such as official documents such as annual reports, government reports as well as non-governmental reports. Secondary sources included publications such as journal articles and books on education policy development and the nature of society. Primary sources are those that appeared first in time such as policy reports and government reports and records of statistics. The research also assessed and applied theoretical perspectives to education research and involved analysis of evaluations and assessments of education policies in South Africa. The research used secondary sources that are the works of historians who have interpreted and written about theoretical perspectives to education, public policy and the political economy. Therefore, evaluations and critiques made by other scholars were relevant to this research. It is however, necessary to note that secondary sources inevitably reflect the assumptions and biases of people who wrote them, a weakness that researchers must note.

While this is the more conventional type of historical research, the researcher complimented this with psychological or conceptual historical research, which is concerned with the origin, development and influence of ideas and concepts. This was applied with the intention of assessing the analytical framework of education policy making in South Africa. It is these ideas and concepts that influence the course of history and the present. This conceptual historical research allowed the thesis to assess policy from its origins, to find out whether the limitations on policy, although also attributed to implementation, may not be emanating from

conceptualisation. The research assessed and analyzed theoretical perspectives that inform policymaking and education research as well as the policies themselves in the South African post-apartheid transformation context.

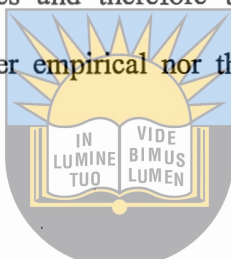
The development of education policy in a transformation state is a complex phenomenon and as such, it does not require a regression approach as this will not examine the causal relationship between independent and dependent variables (Gavaki, 1977:p.32). This argues against a strict laboratory scheme such as an experimental design in which experiments will be formulated to test hypothesis derived from theory or prior research being suitable for this complex phenomenon. Simple linear models that investigate a number of variables that are related to an important variable and then believed to cause a certain phenomena cannot be applicable to this enquiry either. The relationship between variables in this correlation method is usually linear; however, the world does not always operate in such a simple fashion. This correlation method may thus miss important underlying social relationships that are essential for this study.



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The researcher opted for a text based historical study because of the dilemmas that have characterised educational research over time. According to Mills (1959), in much contemporary research there is a growing hope that theoretical imagination can be substituted. Sociologists and educational researchers have been criticised for continuing with abstracted empiricism mainly because they are accused of failing to examine important questions in a scientifically meaningful way. It is an argument that this thesis however discards. This argument has influenced the proliferation of highly technical but a-theoretical studies of schooling and social stratification (Mills, 1959:p.57). There has emanated a highly fashionable and heavily funded tradition of empiricism. In this process, masses of data are collected and computed and then generalisations abstracted from them. This is the kind of research that dominates a lot of literature in educational research. The latest research in

education in South Africa has revealed that quantitative social historians have adopted recent methodological innovations that involve a naïve use of numerical data. As such, they have adopted techniques from both sociology and statistics to map out in some detail patterns of school attendance, years of schooling, school expenditures, teacher qualifications, learner performance and other educational variables. For this thesis, the research explored a number of published studies so as to provide a basis for advancement of a new understanding of the problems that face education policymaking in transformation societies. To suggest the importance of combining empirical and theoretical frameworks, it is viewed that, to sociologists and sociological studies and therefore to sociology of education study an accumulation of studies with neither empirical nor theoretical significance is not largely important (Mills, 1959).



### **1.7 DATA ANALYSIS AND INTERPRETATION**

The analysis and interpretation of available data takes as many forms as the data itself. In part the type of analysis is a function of research purposes and research design showing the close relation between the processes (Singleton, et al., 1988). The analysis is also dependant on the sources of data. The historical analyst is interested in understanding the past and what happened in a factual way. For this thesis the understanding of the past was essential if there was going to be an understanding of the present as well as the future. This thesis drew extensively on this relationship to make a contribution to education policymaking in South Africa.

It is however imperative that historical research is controversial and several different interpretations can be made from the same incident, therefore, thorough and persuasive analysis is important. It is therefore possible for more than one interpretation of a single

incident to be valid (Singleton, et al., 1988). The thesis incorporates various interpretations and evaluated these critically with the help of available evidence.

To investigate the state of the conceptualisation, theoretical and analytical framework on education policy in South Africa and the subsequent reform efforts the thesis made the following assumptions to guide this study. Firstly, that there are the structural and philosophical intentions of education policy and reform and that all systems of education are deliberate and intended at attaining set goals and objectives. Secondly, the admitted problems of South African education revolve around the inequalities, lack of quality and the absence of democratic participation and governance. Thirdly, it is assumed, there are socio-cultural values, norms and beliefs embedded in socio-economic systems that affect the practice and implementation of education reform. Given these assumptions research the researcher followed particular method of analysing given information.

As a way of analysis, the research stated the researcher's argument and interrogated this with theoretical perspectives and available critiques of education policy in South Africa because of the need to interpret given information and not just to present it. It was essential for the thesis to relate interpretations to the evidence. The researcher also went on to give some examples to support any assertions made as examples give credibility to the assertions made. The researcher attempted to give the fairest possible treatment of any perspectives that may differ from the paper's assertion. This was done by way of giving competing interpretations with evidence that supports them and evidence that casts doubt over them. The assessment conducted here and the deductions that followed were carried out within the framework of conflict theory, therefore certain hard-core propositions of the theories regarding the nature of the state and education, nature of classes, roles of social groups (ethnic, class and gender) in education, transformative education, the relationship between education and the economy formed the basis of this investigation.

## **1.8 ORGANISATION OF THE DISSERTATION**

This dissertation is organised in the following manner:

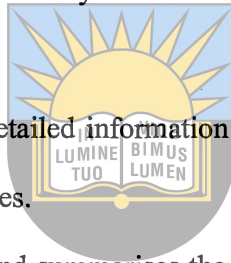
**Chapter 1:** This chapter stated the problem and its setting. It defined concepts central to the topic under investigation. It identified the perceived problems and policy priorities after the elections in 1994 and the reasons why the thesis intends to identify weaknesses. This chapter also provides detailed methodological approaches of the study and their rationality.

**Chapter 2:** The chapter focused on the literature review of issues related to the research project. This includes a variety of theoretical perspectives relating to education its relationship to the state political economy. The literature is discussed, reviewed and key concepts defined.

**Chapter 3:** This chapter presents detailed information about the South African Schools Act (SASA) of 1996 and its major features.

**Chapter 4:** The chapter discusses and summarises the major criticism offered for the SASA detailed in Chapter three. It discusses the salient points of these critiques.

**Chapter 5:** Contains a discussion of the major criticism with a view to proposing a middle-of-the-road approach that is an alternative approach to education policy in South Africa. It presents conclusions on how the analytical framework can be improved if need be so that the resultant policies may effectively and practically take into account the theoretical realities of education reform as envisaged in the various theories debated. Some recommendations based on the research findings were made.



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## CHAPTER TWO

### THEORETICAL OVERVIEW

#### 2.1 INTRODUCTION

In an attempt to generate a picture of what is known about the relevant literature past and present, the literature review focussed on theoretical perspectives to education, the theoretical relationship between the state and education, the relationship between the state and the economy as well as education and the society. Such a background helps the researcher acknowledge the work done by others and relevant to the current research. Some of the most important concepts framing post apartheid legislation are democratic governance, equity and quality. This literature review helped understand the possibility and limitations of attaining these in the context of a post-colonial (post-apartheid state), characterised by deep fragmentation and systemic inequities. It is also a review of theoretical perspectives that inform education reform in revolutionary and transformation societies as well as the conflicts and contradictions of such processes in third world communities in which poverty is prevalent. A major challenge confronting transformation states is to eliminate inequities that arose due to uneven developments. However these states suffer from conflict and contradictions that characterise the development of any new dispensation which have led to the thesis conducting a critique whether education can achieve that redistributive role so as to eliminate inequities and achieve democratic governance in societies that were previously dominated by a minority. To achieve this, the thesis reviewed the work of Carnoy and Samoff, 1990; Paolo Freire, 1990; Jonathan Jansen, 1990;pp.29-38; Bowles and Gintis, 1976; among others.

Further, the thesis concerns itself with the fact that education is crucial to the transformation of society and therefore showed the multiple roles that education plays in society. However while the agenda for transformation may be well set education is also liable to manipulation

to suit particular interests be it by the state or by major role players in different communities. This thesis argues that such influences have hampered the innovation of policies that will help eradicate post-apartheid problems. Therefore the thesis focussed on policy and the debate around the political machinations that influence policy decisions and so defines policy and outlines the debate through the work of Parsons, 1995; Dye, 1992; Howlet and Ramesh, 1995; and also reviewed the work of Peresuh and Nhundu, 1999; Barrow and Melbourne, 1975; Barrow and Woods, 1975; Lawton, 1975; among others which was of particular interest as it all draws on the social roles of education in society and how it must be related to the culture of the communities within which particular education is prescribed.

The origins of policy must be very clear so that its possibilities and limitations can be well understood. This is possible if the state is well theorised and that there are no doubts or contradictions as to the policy path to be followed. It is important for this thesis to assess the relationship between education policies, the state and the economy in South Africa. The thesis argues that an analysis of such a relationship will help understand the conceptualisation of curriculum reform policies and other educational policies. To further critique this idea the thesis reviewed the relationship between education and the economy through works by Livingstone, 1999; Nasson and Samuel, 1990.

## **2.2 POLICY PROCESS**

While policy is variably defined, all definitions concur on certain key aspects. They agree that public policies are products of governments' decision albeit influenced by other role players. The government intentions to do something with a particular situation are conveyed through policies. Dye, 1992; defines policy as anything a government chooses to do or not to do. However this is too simple and fails to separate trivial and significant policy issues.

Crucially Dye acknowledges that the agent of policy making is a government. Public policy is that measure that a government actually takes and therefore wherein responsibility lies. Secondly he acknowledges that public policy involves a fundamental choice on government's part to do something or nothing. It is a choice by government to undertake some course of action. The South African government is very clear on what it intends to achieve.

Further, Jenkins defined policy as a set of interrelated discussions taken by a political actor or a group of actors concerning the selection of goals and the means of achieving them within a specified situation where those decisions should in principle be within the power of those actors to achieve. While Jenkins sees policy making as a process, Dye views it as a choice. However he admits that government capacity is essential because government choice is susceptible to domestic and international resistance. Jenkins also provided the idea that public policy is goal oriented behaviour which provides scholars with an opportunity on which policies can be evaluated.

Through the definitions it can be suggested that concern with public policy is not confined to laws, acts, regulation and promulgations. While they are important it is crucial to encompass the realm of potential choices or choices not made (Howlett, 1986). This is important due to the influence of different historical, political and social conjectures. Analysing policy does not involve just describing a government's policy but why the state did what it did. Often governments do not give reasons for making particular choices or when they do, it may not be the real reason. It is the work of analysts to determine why a particular decision was made, why it failed or otherwise.

It is agreed here that education systems can be manipulated through policy initiatives, to suit particular power/authority interests. There is such debate in education policy formulation and implementation. Dahl, Lindblom, (1953) argued that the definition of problems and setting of policy agendas is a result of a process of competition between different groups. The pluralist

approach views public policy as an out come of a free competition between ideas and interests, that power was widely distributed, the political system as driven by public demands and opinions. This views policy as thriving on the attainment of consensus. However this view has been criticised for being too open and neutral for policy making. Moreover consensus is not easily achievable. Schattsneider argued that there is a lot of bias in agenda setting and those dominant players in the political game limit and frame the extent of conflict. What Schattsneider's argument reveals is that there is a bias operated in favour of some and against some when it comes to policy making. This subscribes to the elitist model of policy process in which power is concentrated in the hands of a few and decisions are in favour of a few. This explains why education policy developments in South Africa have sometimes been described as essentially just political machinations. Appel, 1993; Weiss, 1992 (cited in Appel, 1994), argue that no matter how cautious the findings of critical sociology of education might make them, ideology drives the policy bus. Policy makers may be forced to develop politically palatable scenarios that may, in significant ways oppose the policy maker's good sense but will bring credit from the electorate since the impression created will be that the policymakers are instituting people friendly policies. Appel, (1993) cited in Appel (1994), further suggests that, in the South African situation, progressive policy work is an attempt to gain political mileage while not making significant progress on the real issues and this creates conflict of attempting to attain democratic tendencies while not making change in the real issues.

### **2.3 DEMOCRATIC GOVERNANCE AND EQUITY**

It is important then, to underscore the concept of democratic governance because this is a crucial concept that South African education policy has been attempting to develop within education. It is also crucial to South Africa attaining equity in education. Governance is a

variably and loosely applied term (Stoker, 1996:p.2, Simone, 1999). It is necessary, then to understand the theoretical underpinnings and relationships underlying the concept of democratic governance. There are at least two predominant trends in governance literature. Governance has been made to replace concepts of traditional government in the context of a retreat of the public sector (Osborne and Gaebler, 1992). Crucial is the view that governance is about a 'reinvented' and efficient' form of government in market oriented society. This has been translated practically to government to emphasise focus on private contracting, fiscal restraint, franchising and other forms of regulation to increase public sector 'efficiency' (Stoker, 1996). I will argue that this has led to responsibility for the social being relegated away from the central state to localities and private citizens. Conflict between social classes is common in a transformation state such as South Africa. However, decentralisation displaces such conflict from the state to the school. In most cases in developing countries the localities have no capacity to handle such responsibility. Of the major critiques is that it leads to governments reducing on social spending in line with the policy requirements from international finance institutions that are the major backers of this new form of governance. Instead there is a push from the developed world for the adoption of this 'governance' as a framework for establishing the public sector in emerging markets. This concept of democratic governance is often applied with the concept of decentralisation.

A lot of literature in South Africa will show evaluations of the democratic governance model in South Africa. Decentralisation has become synonymous with this democratic governance model. Decentralisation defined, refers to a wide variety of organisational forms, with a range of functions, authorities and responsibilities devolved or delegated to more local levels of the educational hierarchy (Karlsson, et al, 1999). The process of decentralisation has often been in conflict with developing state policies and has therefore been applied for other reasons and with other results. While decentralisation can lead to increased civil participation in schooling

there are times when decentralisation has undermined civil participation (Karlsson, et al, 1999). In recent times efforts to decentralise public services have often been motivated by the desire to decentralise financial responsibility. This is very crucial to this thesis given the glaring wealth levels evident in South Africa. There is also a need to understand the relationship between governance and equity, whether governance is indeed a means to quality. This calls for an understanding of governance and issues of organisational change (Winkler, 1989; Riddell, 1999).

Given this governance and decentralisation perspective the South African Schools Act (SASA) is intended to extend 'democracy' in the education system. It was hoped that with 'democracy' equity and quality would be achieved in the education system. The School Governing Bodies, hereafter referred to as SGBs, were the forum on which school based democracy was to be exhibited. However 'democracy' has many connotations and implications that may limit its application. On face value democracy is all about election but there are deeper perceptions of power, influence and action that impact in its applicability. This thesis considers the theorisation of social, political and economic democracy. Democracy in this thesis is viewed as a process not an event that must bring about and operate within equity.

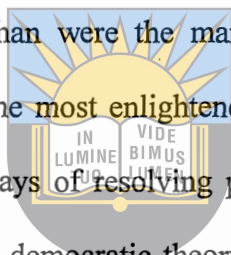
Equity is an important component of post-apartheid legislation. South Africa in general has evidence of inequities in diverse forms. It has a social and economic landscape deeply divided along lines of political economy and socio-cultural identities. Therefore, in much of post apartheid legislation there was a commitment to equity. Equity again is variably defined, because the definition is often contextual. However here the term equity is articulated in reference to broad issues of social justice. Taylor, et al., (1997) argued that to view equity is to stress a particular construction of justice, which is linked to the concern on how resources ought to be distributed than to moral and cultural concerns. Samoff (1996) argued that it is

essential that 'equity' and 'equality' be differentiated on the lines of the two principles of justice, that goods and services in society can be equally distributed so as to ensure equality or that unequal distribution of resources may be to the advantage of the least powerful in society. In the South Africa policy context equity is largely motivated by the distributional justice and is directed towards privileging those who had been marginalized under apartheid (Sayed, 2001:p.254). However, this has met significant obstacles, which I will discuss below. Crucial to the discussion is the view that equity in the sense of redress as in the South African sense is a programmatic response, captured in the philosophy of affirmative action or positive discrimination that is constitutionally enshrined to provide resources to those previously marginalised. The policy of redress in South Africa generally follows the idea that the constitution must permit positive discrimination whereby the previously disadvantaged communities benefit. Therefore there is need to find out through this research how equity, redress and equality are expressed in South African policy discourse both in theory and in key policy texts and to find out whether this expression is adequate for the attainment of democracy and education in South African education. This will help reveal the structural contradictions that will make the attainment of these difficult.

#### **2.4 EDUCATION, EQUALITY AND DEMOCRACY**

Policy is a result of particular research that states must be willing to take. Policies are a product of sanctioned research that is determined by the policy makers. The relationship between education and democracy must be scrutinised. (Le Grange and Lather, 2000;1992) noted that greater opportunities in educational research must exist to help create a more democratic social order. This is based on the notion that the 1990s were a post positivist period in the human sciences marked by much methodological and epistemological ferment. There has been an increase in ideas and practices aimed at understanding social reality,

however education ideas can be used to further democracy. There are times when states attempt to democratise education by following a conservative theory in which they depoliticise education by placing it as much as possible in the province of parental authority, and at the same time they deny parents that democratic authority to implement educational policies that require state support. Democracy theory faces up to the fact of difference in the moral ideals of education by looking towards democratic deliberations not only as a means to reconciling those differences, but also as an important part of democratic education (Bowles and Gintis, 1976:p.11). The argument for a democratic theory of education is that educational problems can be publicly debated than were the management of schools and education systems is left to the judgement of the most enlightened experts. The aim of a democratic theory of education is to consider ways of resolving problems that are compatible with a commitment to democratic values. A democratic theory is however not a substitute for the moral ideal of education.



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Educational research and reform must perpetuate the democratic aspirations of the people. Democracy is a complex area of human understanding that cannot be reduced to a simple, fixed, ambiguous definition. Waghid (2001:p.31) argued that democracy can be viewed in two broad conceptions. It can be seen as a representative system of political decision making, one in which collective decisions concerning the community as a whole are made by elected members of the community. Democracy can also be viewed as a sphere for social and political life in which people may enjoy equal opportunity and are engaged in self-development, self-fulfilment and self-determination. Therefore, democracy as a sphere of political and social life is constituted by values such as liberty, freedom of expression and equality among other attributes. This is a democracy that liberates thought and practices so as to offer more choice, freedom and opportunities for emancipatory politics. This is however not always possible due to the relationship between educational research and knowledge

interests. Democracy and equity are however crucial aspects of the discourse in the new South Africa.

The need to create a relationship between education, research and democracy stems from the fact that the promotion of democratic values is of particular importance to South Africa. Therefore, opportunities in educational research and subsequent policy in South Africa must be geared towards establishing a more democratic and social order. Democratic ideals must be enabled through educational research. Le Grange argues that democratic values can be (re) constructed within social practices such as educational research (Le Grange, 1992).

There is a perception that this thesis values, that dominant approaches to education research rarely examine the philosophical underpinnings, especially epistemological and ontological assumptions. According to Usher (1996) this has led to research being understood merely as a technology, a set of methods, skills and procedures applied to a given research problem and this translates to the policy initiatives which have been at times correctly described as technist and primarily concerned with the present. But, as Lesley Le Grange argued, once research is viewed only as technology it begins only to serve the status quo but does not enable the interaction and transformation of society (Le Grange 1992). This is a typical of the debate on the South African situation. It is a major weakness of the current educational research going on in South Africa where the focus is on particular kinds of evaluation and audits which are rather contemporary and are largely not influenced by their history. The premise of good educational research is that it must contribute to social change and must be conceptualised in a socio-historical context.

## **2.5 STATE THEORY AND EDUCATION POLICY**

There are goals to be achieved through policy intervention. However, their attainment is influenced by other factors, which can be explained through the state's approach to education

the premise being that transforming education is crucial to the transformation of other aspects of society.

There seems to be consensus that the crucial role that education plays in revolutionary societies cannot be doubted. However this role is limited to what is deliberate to the state. The state will provide an education system it deems fit for its people to attain its set goals and objectives. Education is regarded as crucial because it is an instrument of fundamental change especially in postcolonial states (Randall and Theobald, 1988, Carnoy, 1992 and Lawton, 1975). Education is the chief instrument in the process and principal ideological apparatus of the state during the time of transformation. The state is the principal force using the instrument of education to change or shape the transition society so much so that politics and not economics dominate social transformation. The shape of social relations and social change are revealed in how knowledge is defined in the new education system. Carnoy (1992) argues that the way the state relates to civil society is fundamental to the interpretation given to educational processes and structures and is part of a broader ideological framework of the state. Therefore, it is correct to argue that the state's ideological contradictions can best be found in the analysis of a state's education policy.

In the former colonial territories and countries previously under minority rule, developments within education in the post revolutionary period mirror the political conflict between conditioned capitalism and a vision for socialist social organisation. Carnoy correctly observed that in third world countries educational reform also represents an often-changing "revolutionary" definition of knowledge and a sense as to how the revolution intends to recreate individuals and reintegrate them in to the state. Che Guevara, the Latin American revolutionary, argued that after the revolution schools had to create a 'new person' while Gramsci (1971) referred to the process as the 'counter hegemony'. This meant that education systems had to create, by way of educating, people who accepted and subscribed to the

revolution. However this is not always possible because revolutionary governments fail to fully transform political and economic institutions to reflect and to create a new commonness and new social relations. Due to capitalist tendencies whose primacy is profit, monopoly and globalisation, values that make work and social ethics the base for collective goals are difficult to achieve. Therefore, despite independent African states embracing education policies that seek to radically revise the inherited colonial curricular, most post-colonial nations end up with greater continuity with colonial curriculum than radical change envisaged in the official policy documents (Jansen, 1990:p.76).

It is also necessary to note that education is not a policy instrument that operates alone but that its effects are achieved through a combination of social, political and economic policies. Beneficial effects of education policy can easily be nullified by other and contradictory policies in the state. It is therefore, necessary to ascertain the relationship between the state and education polices and what determines the institution of particular state policies. There has been focus on making market forces the determinant of major state policies given the importance and dominant nature of the economy to the survival political institutions. Fine and Rustomjee (1996) reject the dichotomy between the state and market as an analytical starting point. Rather there is inclination to the argument that both the market and the state and their interaction must be viewed as the complex product of the forces that are exerted on them. Most complex of these forces are the economic interests and imperatives attached to specific fractions of classes. However, markets do not only allocate resources and distribute income, but they also shape our culture negatively or positively, foster or thwart desirable forms of human development and support a well-defined structure of power. Education however becomes important because it is an essential component for state machinery to govern and therefore is also attached to the specific fractions of classes.

Public policy in general and education policy in particular is based on how the policy makers (state) perceive the situation of the state. An exposition of the varieties of state theory for the purposes of educational theory is to be found in Carnoy (1992). He argues that the way the state relates to civil society is fundamental to the interpretation given to educational processes and structures that are premised on policy. The differences in interpretations of educational processes and structures arise from contradicting theories of the state. One such theory is that the state is independent of civil society and actually 'interferes' in the work of social welfare maximising free market. The second theory of state assumes that the state's activity reflects and reinforces power relations that derive from these free market economic relations. This indicates towards conflict between free market economy and the state's welfare responsibility. As an alternative view, Carnoy argues that the state's response is based on the force of social movements in influencing state activity. It is however necessary therefore, to establish the relationship between education and the state.



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At the end important indicators in transformation societies like South Africa is how and how much educational expansion and reform differ in transition societies from their past. Due to the transformation agenda governments will always be judged against the past, their success in reversing the past especially in the early years of transformation.

Present conceptions of the state are not devoid of an underlying concept of the state even if such a concept is not made explicit (Arnove, et al., 1992). Such a critical discourse is necessary and central to the understanding of the limits and possibilities of a state's policies not only in education but also in other spheres. The way a state is viewed and understood by its people (policy makers) determines the form of policies that they will institute. It is important to note the role of the apartheid government in both the past and present state of South African education. In former colonial countries education has been given a new role

that is intended to be in direct contrast to the role it performed during the colonial times or those times of domination by a racial minority, South Africa is no exception.

In Africa, there is consensus that all new governments coming out of the colonial period prioritised education reform. Colonial education systems were seen to be disadvantaging the colonised in several ways. According to Peresuh and Nhundu (1999), the fact that education systems were designed to deliberately suit particular administrative and powerful societies cannot be denied. Instead, colonial education had a particular context and purpose. Viewed in a positive retrospect colonial education had deliberate philosophical and structural weaknesses that were exploited to disadvantage certain communities (Peresuh and Nhundu, 1999).

Therefore, all forms of education be they colonial or postcolonial are developed within a given context that shapes the practice and purposes of that education. It is this reason of deliberate philosophical and structural intentions that has necessitated new policy initiatives and education reform in Africa. This makes it imperative that where education reform is reviewed historical conditions must be considered because it is out of the prejudices of the previous system that a new and corrective system can be developed.

This is an important performance indicator of education policy in South Africa. There is relevant literature too, to indicate that education in transformational societies has been negatively affected by the relationship between education, the state and the economy. One of the reasons why the theorisation of the state could be poor is the relationship between education and the economy

## **2.6 HUMAN CAPITAL THEORY AND ITS CRITIQUE**

There is need to understand the relationship between education and the economy. The human capital theory has been put forward to explain such a relationship. The Human Capital Theory

was conceived from a background of increased provision of education systems soon after World War II (WWII) when industrial expansion occurred at the same time as expansion in education. Those who proposed it argued that states that had suffered massive destruction of physical capital during (WWII) recovered economically due to the reservoir of human capital that had survived the war. These, it is argued were intellectuals capable of facilitating the rebuilding of their states. It was believed that the popular demand in educational expansion was a product of the returns that accrued to those who had received extended education (Karabel and Halsey, 1977:p.12).

This theory is premised on the assumption that investment in education is good investment because of two reasons, the economic benefit accruing to the state from the availability of skilled human resources and the economically rational relationship between the level of education of an individual and their level of income. Once education has been classified as a good investment it becomes vulnerable to all forms of interference and predetermination. Only 'appropriate' education will be accessible for particular social classes. The theory asserts that values of people's learning capacities can be explained as a factor of economic productivity. There seems to be consensus that there is a relationship between people's amount of education and the job or the social status the people obtain throughout their lives. This thesis would like to argue though, that the amount of education one receives is aimed at sustaining the individual's existence in a particular social class.

The human Capital theory has been the subject of much academic debate. The origins of the theory itself give light to its application. Emanating from America it is a doctrine that affirms the American way of life and offers justification for huge public expenditure on education in America and elsewhere. This is why the theory emanated from America and had the backing of major finance institutions such as International Monetary Fund (IMF), the Organisation of

Economic Cooperation and Development (OECD) and the World Bank (WB), which were involved in promoting the theory of human capital.

Given such a backing the theory cannot be praised for its intrinsic merits as an intellectual tool of analysis or for having quantitative methods but that it gained prominence for its shrewd compatibility with the ideology of liberal progressivism and its ability to align itself with increasingly powerful interests of higher education industry (Karabel and Halsey, 1977). The theory was in the interests of international finance and so was easily marketable. Considered in retrospect it did not become popular for its intrinsic merits as an analytical tool but rather because of the push from big business and the commercialised higher education sector. Popular as it was during the 1960s it had massive limitations.

Easton and Klees (1992) argue that the view of the linkages between education and the economy has been dominant but has been unsustainable because of its inability to deal with several issues. Particular and rather narrow interpretations of the human capital theory and its underlying framework of neo-classical economics have provided the dominant view of the role of education in the economy. The investment connection between the labour market and education was used to rationalise government involvement in education investments. This investment connection has since dominated thinking about the role of education and the economy for a long time. Such is the dominance that education has become nothing more than a conceptual appendage to the labour market. Hence instead of education determining processes on the labour market, the opposite is true, the labour market determines what education systems teach.

However I will argue that education is just part of a complex set-up in which the state fails to counter the social differences of society. Although part of a complex set up education is the centre of this set up and most dominant because of the crucial roles education plays in shaping society. Carnoy (1990) observed that the most important inequalities in society are

outside public education therefore, the most important equalities lie also outside education. While acknowledging this it is also argued in this thesis that education is crucial to eliminating inequalities in and out of education. Carnoy and Levin (1985) further argued that the struggle for equality through education is a struggle between democratisation and the force of reproduction, to attain greater economic equality in civil society.

Significant criticism has emanated from a major assumption embedded in the human capital theory that the perfect competition prevailing in the labour market ensures that greater earnings reflect greater productivity. There is further belief that the characteristics of workers in a given industry affect that industry's wage scale. In the real world especially in the education sector real wages are not so determined as reflected by the reality of the labour market for teachers and education personnel. There are many other factors that determine wages outside characteristics of workers, factors such as wages, trade unions, and dual labour markets among others. Moreover wages of state employees, of whom many in the education sector belong, are directly administered. It has been argued instead that the degree of inequality of wages at any given time is in part a result of social class struggles over national income as such wages of a particular group of workers is allocated according to their position as a social class whether their influence can get them good wages or not.

This critique is not to say however that individuals or society do not derive some benefit from education but that the gain may be in part due to selective mechanisms in society. While it is debatable how much and the type of educational investment that is optimal for economic growth, it is true that there is a social rate of return to education. Although human capital has been credited with development in the Third World through aid packages that were aimed at developing third world human resources it must be noted that theories of underdevelopment attribute the lack of development in the third world to the nature of relationship between the first world and the third.. It was argued that if the quality of Third World human capital was

improved through knowledge and skills economic prosperity would follow. In fact in some developing states the government pronounced education for all policies with the hope that this would improve the general welfare of the people. However such educations for all policies have not been complimented with adequate job creation in industry. Further several African education systems have produced many unskilled graduates.

It has been observed, in contrast that, in spite of substantial investment in education and training, poverty is growing in many countries and new environmental and health problems have emerged. Liberalism and free market ideologies have spread, creating considerable pressure to reduce the dominance of the state in all domains, including education. Bastid (1977) and Carnoy and Wethein (1977) observed that although the theory gained momentum most developing states failed to organise their education systems to facilitate economic growth especially in underdeveloped countries. By the 1970s as witness to its failure the theory was under a vigorous assault by scholars. A major critique that arose was, as Bluestone (1972) argued, that there was a crucial underlying problem especially in poor societies that incomes attached to low paying jobs occupied by a substantial proportion of people who work full time remain the same regardless of the human capital characteristics of the individuals holding them. This has led to a conclusion that human capital theorists tend to ignore the structural sources of poverty, which I regard as the principal cause of all inequity.

Guttmann (1987) argued, functionalist theorists pride themselves on facing up to the facts of social reproduction and it has been suggested that schooling in a capitalist society serves to reproduce the social inequalities necessary to maintain the capitalist mode of production. The educational system, through the correspondence of its social relations with those of economic life tends to reproduce economic inequality and to distort personal development. Education in capitalist societies produces a stratified labour force and creates unequal social structures (Bowls and Gintis, 1976).

The human capital theory faced with all criticism does not provide an adequate framework for understanding the relationship between education and the economy but instead introduces globalisation as an influential factor in education reform in post-colonial states.

Nzimande (1997) pointed out that any discussion on social transformation, including the transformation of education, cannot be entered into without grappling with the implications of globalisation. Briefly considered, globalisation refers to the increasing integration of the world's countries into a single market dominated by electrical cyber-revolution. As Subotzky (1998) notes the phenomenon is characterised by a regime in which nationals are urged to adopt structural adjustment programmes to create conditions conducive to unprotected trade, the free flow of capital and to speculative short-term investments. Nzimande (1997) further noted that the major features of globalisation are de-regulation and privatisation accompanied by a radical curtailment of the provision of basic social services and the cutting of the state's commitment to social provision. This is how it comes into conflict with educational transformation. Transformation states are faced with ideological contradictions. On one hand there is the revolutionary thought that argues that because the state is now 'free' there must be increased government expenditure so that the government can provide for its entire people. On the other hand capitalist tendencies argue that the state spending on non-productive sectors such as social welfare must be cut. In most cases the latter happens.

The human capital theory faced with all this criticism does not provide an adequate framework for understanding the relationship between education and the economy. It however provides an incomplete explanation for the limitations facing a state that intends to attain equality and democracy. It also explains that the increase in the provision of education is not done entirely to alleviate the poor but rather is part of a global process to maintain the status quo.

Human Capital Theorists portray education as representing mobility, social and political democratisation. This has led to the development of an incorrect perception that the widespread availability of public education creates a more convincing image of meritocracy (system of control) as the basis of the division of knowledge and labour. Carnoy (1992) however argues that the more democratic distribution of schooling and its availability actually makes formal education a less important determinant of economic success. Emanating from this, significant debate has been raised.

## 2.7 EDUCATION AND THE TRANSFORMATION STATE

South Africa was in a period referred to as a transformation period since 1994. Given the central role that education plays in society it is also true that education is essential in South Africa given the need to transform all facets of South African communities. It is therefore, crucial to understand the role of education in a transitional state and juxtapose this with the South African situation. This allowed the thesis to make a theoretical focus on these issues and to formulate the theoretical framework for this thesis.

Carnoy and Levin (1985) and Nasson and Samuel (1990) observed tension between mass education as a democratising force and education as a producer of capitalist inequalities that are founded in the view that capitalism is based on surplus labour. The development of education in transformation or revolutionary states is the victim of such tension. Hence, on one hand, there is conflict between the role of education in bringing about social mobility argued for by the human capital theoreticians, therefore, having an equalising effect through the elimination of inequities, while on the other hand education is seen as perpetuating differences such as class, gender differences, division of labour and unequal access to knowledge (Carnoy and Levin, 1985, and Carnoy and Samoff, 1990). It is this tension that underlies the reform of the educational system of knowledge production in these societies.

Therefore, the dialectical nature of education in the transition is characterised by struggles for greater equity of political power in the state by the forces of democratisation against the forces of reproduction (Carnoy and Samoff, 1990).

The ideal relationship, I will argue, is that there can be no productivity in education if the democratisation of society does not allow for effective and equal redistribution of education, access to education and equality in education. Where education is allowed to prosper as a democratising force it results in the expansion of mass education and more equal access to schooling but where education is perceived as perpetuating capitalist reproductive forces there will be controls on access and limits to equal expansion typical of the 1994 period in South Africa. The system becomes fraught with structural contradictions that enhance inequalities, by unequal access to the ideal type of education or schools. The struggle for equality through education is a struggle between democratisation and the forces of reproduction largely for greater economic equality in civil society (Carnoy and Levin, 1985). Democratising education also means restructuring the power hierarchy in society, which essentially follows the wealth patterns of society.

While this is the ideal situation, third world educational development is different. Third world educational expansion is a product of the number of people increasing, who will be reaching school going age and not as a result of the need to democratise society or to effectively and equally distribute education because there is no geographic shift in the school going populations (Carnoy and Samoff, 1990). In most cases, education in the third world does not expand because there has been equality democracy but through pronunciation of education for all policies which have increased the number of school going children. However it must also be noted that in most former colonies the education for all policy in also regarded as evidence of democracy. It is a policy; however that has contributed to mass education without an equivalent response from the developments in industry.

As such while more people get to school the number does not translate to democratisation and equality. The quality of education provided does not lead to elevation from one social class to another instead it will be relevant to sustain existence in that one class. Added on to this limited educational expansion, there are limitations to state expansion of public schooling at a time of increased demand for schooling due to material and political inequalities. There are several factors that restrict state spending on education. Transformation and independent states waste resources and revenue through corruption and unproductive and grandiose projects. In independent and transformation states the cost of public higher education is usually so high such that very few people hope to reach higher education. The quality of education in rural and marginal schools is poor as they have insufficient textbooks and teachers have only completed low minimal training. This leads to governments, as in Zimbabwe, spending huge amounts of funding on sponsoring higher education. Education competes with other sectors for resources. In terms of returns, Lockheed, Jameson and Lau (1980) argued that agricultural productivity paid higher for every four years of primary schooling. It is such economist thinking that discourages educational expansion.



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In such situations bureaucracy defines knowledge and the sufficient knowledge is usually distant for the average worker. It is this knowledge that forms the basis of primary and secondary curricular. Apparently the bureaucracy systematically places 'impossibility' and 'distance' between the knowledge needed for material success and what masses can learn in the schools. Mwirira, et al., (1985) observed correctly that peasants and the urban poor children fail despite the commitment of marginal rural and the urban poor to their children's education. Of importance to this thesis is that those with little chances of success show growing commitment, which worsens the tension. They view school as a vehicle of escape from marginality, powerlessness and poverty and hence become increasingly desperate. In societies that have large material differences acquiring formal schooling represents

possibilities for individual mobility although few actually achieve such mobility. Ideologically capitalists argue that a society with more schooling will have greater income equality and more democracy (Kuznets, 1955). But, empirically explained schooling and income equality maintain a positive but rather weak link (Carnoy, et al., 1979).

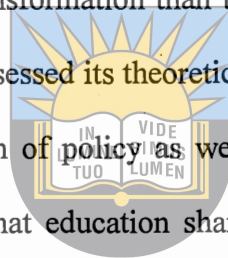
## **2.8 SUMMARY**

From the review of relevant literature above some conclusions can be drawn. Firstly, while policy can be regarded as a vehicle for government intentions and must be interrogated when government agenda is not achieved, it must be acknowledged that the success or failure of state policy in education is subject to several other factors present in the political, social and economic nature of society. Secondly, the roles and values of education in any society follow the social constructions of that society. Poverty poses the greatest challenge to education transformation in developing states given the contradictions eminent in transformation of postcolonial societies against the perpetuation of capitalist reproductive forces. Thirdly, the role of education in creating existing social structures as well as undoing them must not be doubted. For effective transformation education systems must aim at equity. Democratising education means emphasising equality in all systems, which may not be easily achieved given the global context of state existence. Education transformation is influenced by several factors of which the most dominant is economic. Economic influences to education determine the extent of education transformation.

All forms of education and education policies are instituted in a particular context and purpose. They have philosophical and structural intentions that are obvious to the implementers of particular systems of education. Colonial and post-colonial systems in Africa are two systems that can be juxtaposed in terms of their structural and philosophical intentions. All education systems are deliberate and intended to result in desired effects, good

or bad. This is relevant to any study concerned with education transformation so that education systems and subsequent changes can be understood in the context they have been made.

It is essential that the nature of the state is clearly defined and policies made in line with this theorisation. Where the nature of the state is not clearly defined this may lead to social conflict. If a state opts to undertake revolutionary ideology then all processes must be influenced by this ideological inclination however ideologies are known to coexist and this leads to a diluted form of reform. From the review it is clear that there is theoretically, more to educational reform, policy and transformation than the technist perspective that has been adopted. Therefore where policy is assessed its theoretical focus must be analysed as this will help understand the conceptualisation of policy as well as understand its possibilities and limitations. It is however apparent that education shares an intrinsic relationship with the nature of the state and the economy and that any developments in one of these sectors translates to effects in the other sectors.



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## **CHAPTER 3**

### **3.1 INTRODUCTION**

This chapter documents briefly, the major policy texts and their key elements. The purpose is to prove that there are fundamental weaknesses in South Africa education policy that have led to limited success in transforming and achieving equality, quality and democratic governance in basic education. This is based on a critical analysis of the SASA of 1996 as it must be viewed as the basis of education policy in the new South Africa. While the key features of different policy initiatives are important, this thesis concerned itself more with the theoretical underpinnings to this policy initiative. The chapter outlined this detailed policy initiative and conducted critiques in the next chapter of this initiative by indicating how this Act and subsequent policies did not provide a platform for the elimination of stated problems. The thesis acknowledges that it is essential to analyse all policy initiatives given that they are all intended to achieve complimentary goals. However this was not possible given the large number of policy initiatives since made but the focus is on the SASA as it is considered the basis of most education policies in South Africa.

Of all policy after the 1994 elections, the South African Schools Act of 1996 initiative is a major document designed at a national level intended to directly impact on the basic education school system. The Schools Act of 1996 has been the base on which most other policy initiatives have been formed. This piece of legislation is considered in this thesis as crucial to the attainment of equity, quality and democratic governance in South African education and therefore a major critique was done.

### **3.2 THE SOUTH AFRICAN SCHOOLS ACT**

In the White Paper on Education and Training (1995) and in the preamble to the South African Schools Act, (1996) (SASA), (Act 84 of 1996), the government committed itself, to

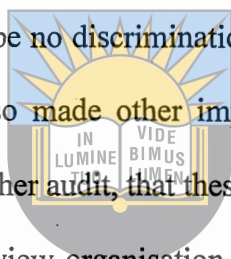
eliminate the inequities in the provision of education as soon as was possible, through this document. SASA clearly identifies that it is state responsibility to address the legacy of inequitable funding of schools. The inequities in education were varied but of major concern to the state were the glaring inequalities amongst provincial educational departments relating to educational inputs and resources, which was viewed as a source of crisis within South African education. As a result of such differences South African communities developed sharp contrasts that put the inequity situation into perspective. The South African school system was based on racial segregation until the present government came into power in 1994. The education systems for whites, blacks (Africans), coloured and Indians had developed separately according to the policy of separate development that was the epitome of apartheid. This contributed to the unequal provision of resources for school education for the different population groups as according to their racial composition. Schools in the former homelands were grossly under-funded compared with school for whites, coloured and/or Indians (Steyn, 1999). Correctly summed up inequity based on race was the base of all apartheid systems and hence a base for many of the problems prevalent in education.



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The South African Schools Act, 1996 was pronounced to promote access, quality and democratic governance in the schooling system. It is intended to ensure that all learners have access to quality education without discrimination, and that schooling is compulsory for children aged seven to fifteen or learners reaching the ninth grade, whichever occurs first (DoE, 1996). The Act also provided for the establishment of two types of schools, independent schools and public schools. The Act also has a provision for democratic school governance through school governing bodies. The school funding norms outlined in the Act are intended to show that government prioritised redress and targeted poverty in funding allocations to the public schooling system. The Act was, however, a culmination of a process.

In February 1995, The Education White Paper 1 on Education and Training was gazetted (DoE1995). This was after preliminary work had been done through the National Education Policy Investigation (NEPI) process, research through the Centre for Education Policy Development (CEPD) which culminated in the publishing of the ANC Yellow Book in 1994 entitled A Policy Framework for Education and Training (ANC 1994). The government framework for restructuring education was based on this document. It confirmed several rights to all South African citizens such as the right to basic education and to equal access to education. It also confirmed the right to choice of language of instruction where reasonably practicable provided that there would be no discrimination on the grounds of race (Kholofelo and Sidibe, 1998). The document also made other important recommendations such as a language policy and the need for a teacher audit, that this thesis will not focus on.



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In 1995 a task team was set up to review organisation, governance and funding of schools (DoE, 1996). The task team in the second Education White Paper recommended that different models of schools must be abolished and rather two types of schools must be established, the public and independent schools thereby doing away with the Model C schools. The establishment of School Governing Bodies (SGBs) in all schools was recommended so that parents took a more central role in the education of their children. The recommendations were clear on the composition of the SGBs. They were to consist of teachers, parents as the majority and, where applicable, learners. Further SGBs were authorised to determine language policy of the school provided such policy might not be used to implement discrimination. SGBs were also given the right to suspend pupils for correctional purposes and only provincial heads were given the right to expel pupils. There were also recommendations too, for the implementation of a sliding scale school fees allocation based on parents' income, providing for exemption for parents who cannot pay (DoE, 1996).

The two white papers were followed by a draft South African Schools Bill of 1996, which culminated in the South African Schools Act of 1996. This was a working document designed to apply to the general or basic education, Grades 0-9 also regarded as Level 1 on the National Qualifications Framework (Kholofelo and Sedibe, 1998).

The development of these policy initiatives followed a history of education in South Africa that points towards discrimination in education. South Africa was characterised by different and unequal school and education systems based on ethnicity, race and colour. The scope of the establishment of SGBs and the general trend of the South African Schools Act of 1996 was to change this and reverse the result of unfair discrimination while boosting levels of democratic participation in schools. The South African constitution requires that South African education must be transformed and democratised (SASA Act 1996). This democratisation of education includes the idea that the administration of education must be decentralised to local school levels. As such stakeholders like parents, teachers, learners, and community members must participate in the running of the schools in their areas.

A policy on School Governing Bodies (SGB), drawn out of the South African Schools Act, Act 54 of 1996 was intended at encouraging the participation of parents in the management of their schools. The Act made it a requirement of all public schools in the country that they must be governed by SGBs. The Act designates certain powers and responsibilities to SGBs. In essence the policy is that every public school should establish a governing body that represents all stakeholders. The overall goals of this policy cannot be separated from the SASA that governs it. Some of the policy goals of SGBs included that it was intended at improving the quality of education of all learners by involving parents into the teaching and learning process of their children. Eliminating poverty was another policy goal, as parents help shape their own children to benefit the whole society, the children become societal assets. The policy intends to encourage partnership in education in the sense that all

stakeholders work together to achieve one goal. The parents and the government must join hands to educate the learners. There were other aspects that may not be central to this thesis however, the SASA 1996 formed the bedrock on which several other policies were formulated. However it must be acknowledged that in line with the new Constitution and Bill of Rights, instruments such as the South African Schools Act (1996), have dismantled discriminatory policies and legislation. At a formal level, the Schools Act confirms that equality of access (irrespective of race, gender, language, religion or culture) entrenches the right of every learner 'to quality education' and establishes procedures for the democratic governance of public schools.



On the basis of the SASA on of the policies instituted to address such shortcomings was the National Norms and Standards for School Funding in terms SASA 1996 (Act No. 84, 1996). This policy was implemented to address the differences in the allocation of financial resources among schools. It was also intended to deal with the different resource levels amongst parents as regards those capable of paying school fees and those who cannot. The issue of public subsidies to independent schools was also dealt with in this policy.

After recommendations from the SASA, the New National Norms and Standards for School Funding became national policy and apply uniformly in all provinces (DoE, 1998). These were aimed at providing for the aggressive distribution of non-recurrent provincial spending according to an equity driven formulae. The policy advocates argued that these norms and standards were aimed at achieving equity in the distribution of resources by progressively redistributing non-personnel expenditure to schools. The Norms entail provincial education departments directing 60% of their non-personnel and non-capital resources towards the poorest 40% of schools in the province. Schools are divided into five categories, based on needs (DoE, 1999). The poorest 20% receive 35% of resources, while the richest 20% of schools receive 5% of the non-personnel resources available to provincial education

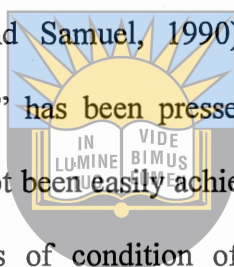
departments. The Department has set out certain categories according to which eligible independent schools are subsidised. For example, independent schools whose school fees in January 1998 were less than 0,5 times (50%) the provincial average public cost per learner in ordinary public schools the previous fiscal year, will receive 60% of the provincial average cost per learner in an ordinary public school. Independent schools whose school fees in January 1998 were more than 2.5 times the average public cost per learner in ordinary public schools the previous fiscal year, were to receive no subsidy (Government of South Africa, 1998)

Through the SASA the issues of race, diversity and values were made genuine concerns. The issues of race diversity and values are an important part of any analysis that will inform policy making in general and especially in South Africa. The South African education system was organised on racial lines for generations. Apartheid legislation over the years managed to create, parallel racial and ethnic systems of education that precisely reflected the constitutional order, with its explicit and implicit ideologies, its hierarchies, multiple power and patronage structures, its gross cruelties and inequalities, and its inherent contradictions (Department of Education Annual Report, 1999).

The problems that South African education faced in 1994 are well documented and will not be repeated here. It is the response to these problems that is of value to this thesis. These problems were challenges that necessitated the need for a theoretical and analytical framework on the side of policy makers that would effectively serve as intended, to help policy makers come up with policies that would identify all possible solutions to reducing and eventually eliminating the crisis. An effective analytical framework was necessary so that correct policies could be recommended and ideal reforms implemented that are effective and could bring about real change.

The thesis suggests and will argue that the nature of enquiry and the subsequent education

policy at present is bedevilled by two fundamental difficulties among others and will prove this by analysing this major policy initiative. Firstly there is concern that the theorisation of the post apartheid state is insufficient such that it is not possible to appreciate fully the nature and effect of national policies and the theoretical foundations of a transformation society. The second problem arises from the extraordinary influence which neo-classical conceptions of the relationship between education and the economy has achieved over the understanding of the meaning and role of education in society, whether education can be seen to play an active redistributive role in achieving a more just and democratic order and therefore transforming South African society (Nasson and Samuel, 1990). The social goal of “equality of opportunity” or “equality of access” has been pressed hard especially in education. It is important to find out why this has not been easily achievable. Education plays crucial double roles to reshape social inequalities of condition of livelihood and to compress gross inequalities of real income (Nasson and Samuel, 1990).



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The analysis of critiques on policy were done to show that policy initiatives may experience limited success as a result of policy's a-sociological focus. Education, the state and the society are so strongly interlinked and interdependent such that any process of reform initiated in education must be complemented by similar purposes and processes in the state and society. It is on the basis of this premise that I will argue that total equity, quality and democratic governance in schools may not be achieved as long as the social nature of education does not become major concern to policy makers and implementers.

Therefore, I further explored the Act and its critiques with a view to making a contribution to a more inclusive education enquiry. This involved the theorization of the post-apartheid state, examination of such issues as the polity/policy process, postmodernist theories and a critique based on educational context of social class. It entailed putting a sociological perspective to education policy making.

In the process I will show that South Africa, like most developing countries, will witness the development of a greater social differentiation in the delivery of public services, in particular education, even while the process of transformation is in progress. There eventually will be a widening gap of inequity, lack of quality and democratic governance following the pattern of the rich as against the poor. Therefore, this thesis is concerned by the semblance of some continuity with the past and what is causing this process.

### **3.3 SUMMARY**

An effort has been made in this chapter to outline the major tenets of the SASSA (1996). While there have been several other policies on education in South Africa this thesis has focused on this policy initiative because I have regarded it as a major document from which other policies have evolved. This Act has shown a theoretical commitment by the Government after 1994 to reverse the apartheid legacy in education and therefore transform the education system. It has also confirmed that the government acknowledged that the problems of South African education revolved around inequality, lack of quality and the lack of democratic participation in education, in particular school education. However there are still semblances of inequality, poor quality and limited democratic participation and governance in schools even at present. In the next chapter the thesis will argue that this semblance of continuity is a result of theoretical underpinnings as well as the conceptualisation of this Act among other causes.

## **CHAPTER FOUR**

### **4.1 INTRODUCTION**

This chapter provides a major critique and a detailed analysis of policy aspects documented in the previous chapter to indicate that the analytical process and subsequent policy initiatives have serious weaknesses that may contribute to their limited success. This is done in relation to the problems identified at the inception of democracy in 1994. Two of the most central organisational concepts framing the transformation of the post-apartheid South African education system, as laid out in the SASA of 1996 have been governance and equity which are considered as a response to the crises in South African education in 1994 (DoE, 1996a).

These are debated in this chapter, which focuses more on their theory and conceptualisation.



### **4.2 POLICY AS AN AGENT OF CHANGE**

The policies explained in the previous chapter are a valued contribution to the education transformation efforts in South Africa. In compliance with other policies they were expected to provide the legal framework for the elimination of the apartheid legacy in education and to bring about equity and increased democratic participation in South African education among other objectives. It is necessary to acknowledge that these initiatives give a starting point in education policy development in post-apartheid South Africa. Developments in policy and legislation through the establishing of new structures, formulating policy and passing of legislation, at both national and provincial levels reveals that transformation has made significant progress in terms of legislation and policy pronouncements (Enslin and Pendlebury, 1998).

However, important though they are, formal changes cannot guarantee better practice. Where policy makers take little account of the context and agents of implementation, policy may impede rather than enable transformation in the South African situation. Policy and legislation can have limited transformatory effect (Enslin and Pendlebury, 1998). Since 1994

there has been an array of macro level initiatives and principles for overcoming the structural inequalities of apartheid education. For instance education departments are no longer racially defined, the right to education for all forbids denial of access on grounds of race or gender. It is argued too that resources are being shifted from privileged to deprived areas. While these are valuable policy contributions when assessed in respect of their conceptualisation and in the context of South African social fabric significant weaknesses can be revealed.

At face value much seems to have been accomplished at the level of policy, however, the real work of transforming practices and institutions has yet to be done. Some policy analysts have hailed the new policies, while others have observed deep conceptual flaws, implied political betrayals and empty principles. From such varied perspectives I will argue that the limitations in conceptualisation emanate from the weaknesses in the theorisation of the post-apartheid state. A proper theorisation of the state would reveal that there is a social stratification that is based on wealth, status, class, gender and race that has to be addressed if educational transformation is to succeed and therefore the focus of education reform must be to redistribute productive resources so as to obtain a measure of equity among the different social structures. This would create the platform for democratic participation in education, which is impossible if the present inequality is maintained. Consequently, the new policies while enabling will largely impede the work of educational transformation in South Africa.

Such policy initiatives at national and provincial levels do not seem to completely wipe out inequality, racism, poor quality education and limited parent participation in school management. This thesis attributes this to the view that these policy initiatives treat these issues in much generalised ways, maintaining a polarity between 'blacks' and 'whites'. As such despite numerous policy initiatives there is still recognition that the race difference and its translation into class structures cannot be done away with, hence these policies do not undo this status quo. In many schools a predominantly assimilationist response to

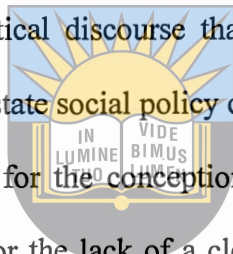
multiculturalism has resulted in another version of racism. Clearly, overcoming racial inequalities involves much more than equal access to schooling, demands for increased participation in school governance or even a new curriculum initiative although they do contribute to it.

#### **4.3 THEORISATION OF THE POST-APARTHEID STATE**

As mentioned the weakness in the concept of theorisation is a major limitation to the effectiveness of policy response after 1994. Theorisation of the state refers to that underlying concept that is applied to inform social policy. Social policy, of which education policies are part, is always informed by an underlying concept. In the South African situation present conceptions of social policy as shown in the SASA of 1996 are not totally devoid of an underlying concept, however, this underlying concept is not clear and is not made explicit. Instead policy development is characterised by a lack of critical discourse on the nature of the post-apartheid state. There is evidence that current conception of social policy seems to lack critical discourse on the nature of the post apartheid policy, which has led to contradictory and insufficient policy response. A critical discourse would facilitate understanding of the deliberate social choices that underlay particular social policies, the interests they represent, and the mediatory role of the state founded in on the basis of its consensus-seeking mandate. Following this analysis will explore more fully the nature of the contradictions that the state faces in relation to question of power and access to national resources. This weakness has led to policy limitations especially regarding the policy's ability to deal with the legacy of the apartheid state as well as questionable policy priorities. It has led to the failure to correctly conceptualise education policy.

A proper theorisation of the post apartheid state is essential given that the pre 1994 social and economic patterns of life were developed over a period of almost three-and-a-half centuries

of White rule. This defines the social structure of South Africa. Educational institutions reflect the realities of power and social class and the socio-economic structure of any country and as such to attain equity in the education system means undoing the socio-economic structure of the South African community. Given the history of South Africa, state social policy must adopt a re-distributional stance on poverty and class inequality, which is what is needed if equity and a democratic social order are to be obtained. This fact alone must somehow influence policy with the help of effective critical discourse. A proper theorisation of the state allows for effective critical discourse. The limits and possibilities of social policy must be informed or shaped by critical discourse that will put the country's legacy into perspective. Since it is assumed that state social policy choices are a result of the need to gain consensus, critical discourse allows for the conception of various contradictions that help inform policy choices. One reason for the lack of a clear theorisation of the state emanates from the view that there was an equity/development tension at 1994.



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At the inception of democracy and in the period after 1994 there was tension between equity and development in South Africa emanating from the multiple and contradictory demands that emerged after 1994 (Badat and Wolpe, 1993). The equity and development tension emanated from the view that at 1994 the state was expected to deliver a more just, egalitarian and humane society in a climate of rising expectations and hopeful promise by largely a black majority while simultaneously providing conditions for economic growth and development (Sayed, 2002). This was the view of the majority black population. At the same time the state was also positioned as the modernising instrument for advanced capitalist accumulation in a context of increasing globalisation and financial austerity which would signify economic prosperity for the country (Sayed, 2002). This was the view of the minority white population. Therefore it was presumed that the state would unify a divided society without threatening

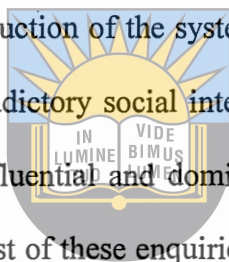
the white population. However what this meant was that restitution was to take a limited form and this went a long way to influence education policy in the new South Africa.

I argue here that an admission of such a situation seems to be lacking in the current policy discourse. One effect of this weakness is that too much of the current education policy analysis is erroneously focused mainly on the immediate problems and demands of educational reform and very little attention is being paid to the possible long term source and effects of the reforms presently under way, such that the response is not far reaching. It has been noted that in South African education policy and research, a great deal of attention has been given to symptomatic complaints about educational issues as these manifest themselves in the weakness, failure or breakdown in service delivery. An observation of policy development in South Africa has concluded that there is much writing on policy matters by educational academics in South Africa. However, while some of this work is thoughtful, much is mostly theoretically technist, a weakness that I ascribe to the absence or the inexplicit nature of an underlying concept (Appel 1994:p.218). This has influenced the nature of research that has gone on in South African education

A lot of significant research has been done into the absence of basic infrastructure such as textbooks, other learning infrastructure (Steyn 1999, Coetze and le Roux, 2001). There has also been significant insight into the quality of learning or lack of it and the lack of adequately trained staff as regards new programmes such as the new curriculum as well as their training to teach subjects such as maths and science. The performance of learners has been measured with particular importance given to maths and science. Corruption in the use of limited resources has also been the focus of significant research. Motala argues further that the analysis of policy and the tools of enquiry so far relate to particular kinds of evaluations and audits (Motala, 1998). As such there have been evaluations of the preparedness of teachers in respect of the new curriculum, the performance of children in maths and science,

poor matriculation results the availability and quantity of basic infrastructure and other physical needs among other evaluations. The competence of administrators has also been the focus of significant research.

I should note that the importance and value of such enquiry is not in doubt because such information assists in costing, evaluating the efficiency of resource usage among other planning needs. However, it is argued here that such enquiries are limited in their scope and nature and therefore block more fundamental structural critiques of the reasons for the weakness and failures of South African education policy. Instead they do not question the more crucial issues about the reconstruction of the system, the nature and content, the limits and possibilities as well as the contradictory social interests within which the state policies evolve. Although a framework of influential and dominant social and cultural conceptions about education has been applied, most of these enquiries have been a result of measurement of outputs relative to investments (Motala, 1998).

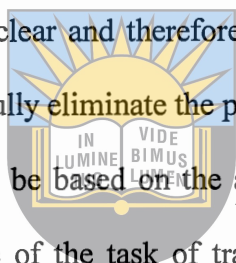


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This focus on other issues listed above has led to weaknesses in other areas. Therefore what is important to the current predominant forms of enquiry in South African education policy making, which forms the bedrock of policy research today, can be characterized as being a-sociological in its approach. Categories of class, gender, rural and urban, poverty and wealth levels, spread of opportunity and even race are in most cases excluded. It is these inequalities in these categories that characterise the inequality in education at present for they do not encourage the redistribution of productive forces to benefit the previously disadvantaged.

This research explains such a prognosis as being the result of the weaknesses in the underlying concept that can direct policy development. While these issues are important to South African education they however, are not the root causes of the problem. The problems of equity, lack of democracy and participation and quality in education are partly caused by some of the factors stated above. However I argue that the major problem is the massive

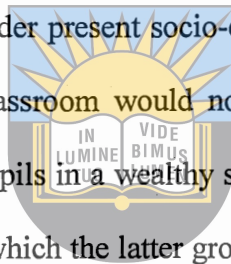
differences in wealth levels that follow a racial pattern and limit the access to resources. This is a creation of many years of apartheid development. It is the major source of inequity, lack of democracy and poor quality education among the different social classes. A popular trend has developed in which the stratification along wealth levels has been entrenched due to the fact that previously marginalised communities that can afford have mobilised their resources and moved on to institutions where they can access democratic participation, quality education and equity. This is the trend that policy must recognise and this is possible only by identifying and agreeing on that underlying concept that will be used to formulate policy. This concept, at present is not very clear and therefore, this research argues, policies made outside such debate may not successfully eliminate the problems.



The underlying concept, which must be based on the apartheid legacy, would allow policy makers to understand the magnitude of the task of transforming South African education. Policy initiatives must recognise the enormity of the task of achieving equity or equality in education, or equal education quality and democratic participation in education. The magnitude of the task is premised in the segregationist and apartheid policies of successive South African governments. As with other basic services, the distribution and training provision in South Africa is founded in and follows a system of contrasts and paradoxes that proceeded to influence positively and negatively education policy in present South Africa. The problems in 1994 were real and have to be confronted if the apartheid past has to be dealt with in the present. The State while attempting to transform education has also established education systems in which discrimination, inequity, inequality, differentiation and racialism have become entrenched because of the multifaceted and central role of education (Kies, 1998). The education system must be viewed as only a component in a complex system designed to create inequity and therefore, can be influenced and influences political, social and economic life. All basic amenities such as political, economic and cultural rights,

housing, transport and social amenities were balkanised along class and racial lines. This suggests therefore that attempts to deal with educational issues cannot be successful through assessing education issues alone but rather there is need to focus on the very structures that were used to create such differences.

It would therefore be erroneous to imagine that the apartheid legacy can be reformed and overturned easily. Such simplistic goals as a prescribed "equal" pupil-teacher ratio for all schools can in themselves lead to the attainment of equity are misplaced given the social and economic set up of South Africa. For example, it has been argued, and such an argument will be continued in this research that under present socio-economic conditions, 40 pupils to one teacher in a township or a rural classroom would not receive an education that could be equated with that of a class of 40 pupils in a wealthy suburban area (Kies, 1998). The actual conditions of the neighbourhood in which the latter group lives, the superior circumstances of their parents and family and the opportunities for social development provided by the environment can exert a substantial influence on children and their comprehension of what goes on in the classroom. Further, even if all the other physical and teaching resources were equalised for all schools, pupils being taught by well-qualified teachers with a wealth of experience are going to benefit immeasurably more than those served by unqualified and under-qualified teachers, denied the opportunities of the former group. As evidenced at present the least qualified teachers are found in the most remote areas of South Africa and at present a more than 280 schools in the Eastern Cape are run by just one teacher either as a result of capacity or that teachers find it difficult to teach in rural areas (SABC, 2/10/02). This made the quality of schools a major issue and source of conflict in the government's redeployment programme as teachers complained against being redeployed to schools that are in the most remote areas of South Africa. It is important for such questions as whether location, township, shack settlement schools provide an education equal with that provided



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by those in privileged group areas? Can equity be achieved inside those conditions? In an effort to answer such questions new policy perspectives will be realised and new approaches necessary.

#### **4.4 SASA AND EQUITY IN SOUTH AFRICAN EDUCATION**

It has been argued that there is a problem with the African National Congress' (ANC) education pronouncements that it seems the focus in "creating equity" seems to be on providing equality in the provision of all educational resources - monetary, human and physical - for all the country's school-going children as shown in their policy declarations. "The State must fund public schools from public revenue on an equitable basis in order to ensure the proper exercise of the rights of learners to education and the redress of past inequalities in the education provision" (Section 34(1)). The Education Authorities' rationale is that there is inequality in the provision of physical resources among the schools of the nine provinces and that more money is needed to rectify this position. While the overall aim is justified the strategy can be improved. In the policy "achieving equity" has been reduced almost entirely to a matter of money at a time when there is growing perception that government cannot continue to increase social spending because that is not economically viable and therefore does not make economic sense. Given the globalisation context within which South Africa exists there is strong pressure on governments to reduce on social spending of which education is part.

I further argue that equity in education is a long-term process that can only be achieved if the destructive features of South Africa's apartheid legacy have been totally destroyed. Poverty will have to be eliminated, so that every family can provide children with the basic needs for a good education. Educational achievement the world over is closely related to the class, race and ethnicity of people. As a result the conclusions such as, deducing from the 1997

matriculation results one could suggest, “that many of the characteristics of the old system still persist” have arisen from patterns emanating from the geographic aspects of the results. According to Ota, each year the release of matriculation examination results is greeted with shock, concern, threats and after that promises of better results the following year (University of Fort Hare Education Policy Unit, 1998). What is obvious from these citations is that matriculation performances have been bad in the largely less privileged communities, testifying the poor quality teaching and learning going on as public examination results continue to be influenced by race. While this follows strict demographic structures, it has still been a national concern. This brings into context the issue of inequity and how it has been entrenched by the policy initiatives after 1994.

The School Register of Needs (SRN) published in 1997 reveals an interesting pattern. The SRN was a product of an exercise in data gathering and information analysis. It was intended at giving Government an indication of the physical needs of schools around South Africa. The exercise located and visited 32 000 education institutions whereby the focus was on school facilities, condition of school buildings, services, equipment and resources. It was found that many schools do not have access to basic amenities such as water, power, telephones and sanitation while some experience massive irregularities in stationery and books (DoE, 1997).

The survey revealed that 24% of the schools in the survey had no water in walking distance. The provinces worst off in this regard are Northern Province in which 48% of the schools have no water, Eastern Cape 34% and KwaZulu Natal (KZN) 25% and 22% in the Free State. Electricity is another commodity in limited supply because less than half the schools visited (43%) have electricity. The lack of power supply is endemic in the Northern Cape 79% without, Eastern Cape 77% and 61% in KZN (DoE, 1997). Telephone services are also erratic at schools with the Northern Province and KZN leading as the areas with seriously

inadequate communication. The Northern Province, Eastern Cape and the Free State are the leading provinces with very poor infrastructure in their schools. While these statistics make interesting reading they show a pattern in which the same provinces have huge inadequacies in the factors considered. In all the statistics the Northern Province, Eastern Cape and KZN feature prominently. These are the same areas with also the poorest results with the situation in the Eastern Cape well documented.

Therefore I argue that policy initiatives must acknowledge such differences and deliberate policies must be enacted to rectify such imbalances because limited access to such basic amenities leads to a negatively impact on school academic performances. Such differences do explain the differences and patterns in the results of matriculates among the provinces. However, through the constitution, government stance towards schools is semi-federal and such problems as the inequity among schools has been devolved to be the responsibility of provincial administration. As a result some provinces have continued to develop their education facilities because they accommodate not so poor communities. It has been said that a school is only as good as its surrounding community. In other provinces such as the Eastern Cape there have been continuous problems that can be related to the limited access to resources of the majority of the people living in the province.

The attainment of equity has been a major concern to South African policy makers, however there is a perception in South African education policy making that achieving equity is a policy option that will correct present imbalances in education provision. While it is true that debate on equality of opportunity in education must answer the question of access to education this must be followed up by policy intervention in other social processes. It is claimed that equal, fair and just provision of monetary, human and physical resources to all schools in South Africa's nine provinces will reduce and eventually eliminate the gap in education achievement standards between advantaged and disadvantaged learners (Kies, 68

(2). While this will be crucial to undoing the inequalities of the past, there are problems inherent in this simplistic assumption and the current developments already reveal a widening of the gap in standards and achievements among the country's schools.

In the Route to Equity in the South African Context it has been argued and rightfully so, that in the present political, social, economic set-up the mere granting of equal subsidies to all pupils will not, as the government seems to assume, guarantee real equity in education (Kies, 68(2)). Further it has been argued that it is essential to look at the different kinds of public schools, the challenges presented by the Private (Independent) Schools and the range of fees that all parents now have to pay for the education of their children. This thesis tends to agree with the observations that schools in South Africa are developing in a direction away from the pursuit of equity and equality, contrary to official pronouncements and policies. This critique is based on the observation that to attain equity there must be a redistribution of resources. If a semblance of equity is achieved then education may be able to play its redistributive role to create opportunities for the socially disadvantaged, which is in contrast to the present whereby it is reproducing the differences and inequalities of the past.

In a crucial first step to achieving equity the South African Schools Act managed to bring down structural barriers to the access to education. This was a positive development in that learners could move from any school to any school of their choice without any restrictions on the basis of race. However, it had its own negative effects as a policy because there emanated a particular pattern of learner movement that went on; “On the whole learners moved from poorly resourced schools to well resourced schools, from poorly disciplined schools to well disciplined schools, from where learners fail examinations to where they succeeded (DoE, 1999).”

In brief, this movement was determined by class identity and class aspirations. At the same time movement was basically movement of learners in one particular direction to “better

schools” but there was no complementary movement of resources or learners in the opposite direction to not so well resourced schools. This pattern of movement contributes to the entrenchment of the inequalities that the system intends to eliminate because those who can afford move their children to better quality, well resourced schools. This meant that class identity and class aspirations were major influences on the pattern of school attendance and this would have serious effects on those areas deserted by both learners and resources. It also meant that demographic geography was strengthened not only along the lines of race but also along the lines of class and gender.

It is still apparent in present day South Africa that the racial geography of group areas still determines access of most African families to schools. Many parents have resolved to making serious financial commitments so as to give their children a good education but there is a significant number that still find the cost of getting their child to school deterrent. It is a reality that the education migration facilitated by the SASA of 1996 did not bring many children from non-African families into former homeland and township schools but rather it has tended to be one-way traffic in the opposite direction, significantly widening the gap. The movement was based on the social class of the parents enhancing the view that if the focus is not on the different wealth and social levels of the South African community policy initiatives may not make significant steps towards attaining equity in education.

Jansen argues and rightfully so that the answering of certain questions must precede any democratic negotiation of education reform, questions such as what are schools for? Such a question is essential because South Africa is emanating from a colonial era and there is need for clarity as to what role education is to play in a transformation state. A clear theorisation of the state is needed and precise education policy initiated with this purpose of education in mind. Such questions are also essential to help eliminate the confusion as to what democratic governance means to the communities. Even more interesting and relevant to this thesis is

Jansen's argument that these questions are not easy to answer because the answer depends on where one stands, their current or aspirant position in the social structure and one's relative empowerment in the social structure (Jansen, 2000:p.3). Hence unless such questions are answered the required policy result may not be achieved. It is therefore, relevant to this thesis to ask yet another question, what do the democratic citizens individually and collectively expect their public education system to deliver?

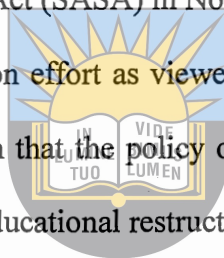
#### **4.5 DEMOCRATIC GOVERNANCE AND PARTICIPATION**

The concept of democratic governance is relatively new in South African education discourse but is well promulgated in the SASA of 1996. After 1996 a unitary model of public school governance that was intended at devolving governance and management decision making to schools was embarked upon. It was within the national social transformation project that SGBs were seen as an important way to democratise schools and school culture and therefore attain equity through their powers, functions and composition. The SASA of 1996 allocated several responsibilities to SGBS such as budgeting, local interpretation of local and national education policies among others.

The history of education in South Africa points towards discrimination in education. South Africa was characterised by different and unequal school and education systems based on ethnicity, race and colour. The scope of the establishment of SGBs and the general trend of the SASA 1996 is to change this and reverse the result of unfair discrimination. The South African constitution requires that South African education must be transformed and democratised (DoE, 1996). This democratisation of education includes the idea that the administration of education must be decentralised to local school levels. Sayed equated the movement towards decentralisation with calls for greater community and parental participation in schooling (Sayed, 1995). As such stakeholders like parents, teachers, learners, and community members must participate in the running of the schools in their areas.

However a look at the assumptions of the concept of decentralisation will reveal certain contradictions.

The policy of educational decentralisation has in recent times become a key aspect of educational restructuring in the international arena. The decentralisation of educational control and decision-making is also evident in discussions surrounding educational restructuring in South Africa and has been expressed in the call for greater community and parental participation in schooling. This move towards greater devolution and participation in schooling increased in momentum after the elections of 1994 and was sanctioned with the passing of the South African Schools Act (SASA) in November 1996 (Sayed, 1999). The first major weakness of this decentralisation effort as viewed by Sayed (1999) must be that it is considered as borrowed concept given that the policy of educational decentralisation has in recent times become a key aspect of educational restructuring in the international community. This observation alone creates much debate as to the applicable nature of the same reform in a country such as South Africa.



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This section of SASA while well intentioned has significant limitations. Certain questions have to be considered when looking at the policy of decentralisation. What are the policy objectives of the education system? If there are high levels of inequality in education as in the South African situation, then decentralisation might not be an appropriate strategy. It could also be further asked of the South African situation that what capacities exist at different levels in the country in order to implement a policy of decentralisation (Sayed, 2002). In an attempt to find answers to such questions limitations of South African policy of decentralisation in education can be revealed.

Coming from apartheid the state was largely expected to be responsive to the will of the people and to guarantee increased participation and so extend democracy into the society. This contradiction was in line with Offe's observation that there was a dual imperative to

ensure capital accumulation while at the same time developing a legitimate hegemonic discourse through meeting the needs of citizens (Offe, 1984). (Dale, 1977), attempted to explain what occurs in the face of such a contradiction.

With the inception of democracy the state underwent some changes in which there was devolution and different roles taken over by different sections of society. However to justify decentralisation, he arguably states that this does not necessarily imply a loss of state power or its withdrawal as a desegregation of the state and what the state is, but rather is redefinition of roles as a reorganisation in a nation state at the centre and dispersed decentralised state at the sites (provincial). Therefore there are different activities and mechanisms available for the state (centre) and the sites (provinces). In the South African context of decentralisation of education, at the centre, the state (national government) is responsible for funding of the sites but is not responsible for the management and control of schools within the sites. The state therefore, funds but does not deliver and provide. It is at this point that it is argued that the state has relegated its responsibility to structures with lesser capacity to execute such responsibility. The reform process becomes the responsibility of the sites and those with the capacity to execute effectively government policy requirements can assist in the transformation while those sites that do not have the physical or material resources to do so fail. Therefore there are limitations to the reform process.

There arises a need to juxtapose the apartheid and post apartheid education management systems to realise the different levels of state intervention. In the post apartheid context, the state began to operate on a new system of control. It sets limits and goals and the provincial sites are responsible for achieving the national goals of equitable provision of educational resources and services. The apartheid system took a hands on, direct influence approach, a style of management that directly intervened in the process of educational provision and delivery (Sayed, 2002). It was through this management style that they managed to sustain

their policy of separate development and achieve the glaring inequality visible at the present to their advantage. In contrast the post apartheid government adopted indirect control where the emphasis is on controlling outcomes rather than inputs. Therefore, they set limits and ensure that goals are ascribed to and achieved (Sayed, 2002:p.40). There is however no mechanism to guard against the loopholes that come from not being part of the process. It can be argued therefore, that the post apartheid management is not the correct way to deal effectively with the reform agenda. Instead it allows for the devolution of national problems to provinces that do not have the capacity to deal with them. It has meant the state is a semi federalist state when it comes to solving education problems.

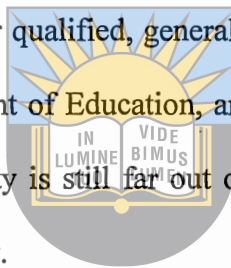
The state has thus adopted a monitoring role whereby it assesses the effects of new budget allocations on the current inequalities in school provision and the level of fee charging. This research therefore, argues that the state has created unnecessary distance between itself and the actual problem leaving the solution to education problems to be the responsibility of the sites. While the state has maintained a hold on power it has devolved the problem solving responsibility to the sites. The distances between has led to policymakers (state) being far from the problems and therefore have recommended policies that may not be successful in reversing the apartheid legacy in education.

Sayed identified major tension within the policy in that SGBs were empowered through the provisions of the SASA to raise additional income revenue in the form of fees. This was premised on the assumption that such a provision allowed for parents who wished to provide quality education for their children over and above the state subsidy. The proposal on fees exemption is good because it premised on consistency with relation to parental income. It however has significant loopholes that are exploited in the implementation phase of the policy. This proposal assumes that parents will act in good faith in declaring their correct income and so act for the good of the school community. It further assumes that SGBs have

the skills, capacity and resources to track parents' reported income. Human nature as it is points to parents exploiting any opportunity. There seems to be a contradiction in that in order for the schools to generate money, the principle of fee-paying has been carried over from the Model C school system into the general education system leading to the argument that education has become a commodity and the principle of "user charges" has been introduced. It is necessary to make some comparison to reveal the magnitude of the difference. There are sub divisions in the public schools such as township schools, traditional suburban state schools, inner-city independent schools, "private" or community schools and Model C-type schools. Private (Independent) schools pose a growing challenge and the discrepancy can be ascertained by making a comparison of the following figures. In 1998 the fees at the different types of Public schools ranged from R50 at most township schools to R2900 at some former Model C schools. At Private schools the fees ranged from R13000 per year at St. Stithians in Gauteng to R44500 a year - all-inclusive - at Hilton College in KwaZulu-Natal (Kies, 1998). These figures on annual fees clearly illustrate the stark realities of the past, current and future education situation in South Africa. It must be realised that wealth differences within the society will determine the education to be obtained by various social classes. Further the assumption that SGBs can raise additional revenue applies to those schools located in communities that have significant income. Therefore the well-developed schools have the advantage of attracting increasing learner numbers while accessing significant funds thorough the communities they serve. They strengthen the argument that equity will not be easily achieved without some form of intervention.

Entrenching the differences, the strategies to "achieve equity" and to eliminate imbalances in education provision apply only to the Public (State) school system. The private schools, it is argued, are not affected by retrenchments and pupil-teacher ratios. In fact they attract the best-qualified and most innovative teachers, many of them retrenched from the Public school

system. They also offer courses that are attractive to youth whose primary desire is to obtain an education that will enable them to obtain well-paid jobs which they assume are obtained through studying particular subjects. This is exacerbated by the fact that SASA allows free movement of learners to any school of their choice leading to a general pattern of movement away from the disadvantaged schools. This has further entrenched the concept of inequality in that the reality of the situation is that the former Model C schools, despite increasing levels of fees demanded of parents, have attracted large numbers of pupils and students whose parents sought escape for their children from the over-populated, under-resourced township schools staffed in the main by under qualified, generally demotivated teachers. Thus, despite the best intentions of the Department of Education, and agreements with the teacher unions on national norms of staffing, equity is still far out of reach in a socio-political climate in which the 'user-principle' holds sway.



One of the most dominant criticisms is that SGBs and school leadership have also not got much guidance to deal with their new circumstances. While it is mandatory for all schools to have an SGB no policy to guide these SGBs has been issued from the department of education. Therefore schools have had to find solutions to problems they had never encountered before. The onus to select who is and who is not exempt is placed on SGBs leading to the school with legal grounds to exclude others who cannot pay school fees. In such a situation the beneficiary of the new policy may be parents who already have children in high fee charging schools. In such situations, as Ball (1994) argues, the middleclass families will benefit because they have the cognitive capacity to manipulate the system to their benefit. The result is that while race does not seem to be an issue the relationship between race and class is determinant because the better off classes have exploited loopholes and benefited from the system. The state has diminished as an active interventionist agent and so has passed the responsibility for ensuring equity and redress to individual SGBs who are

too small in many ways to achieve this. The post apartheid state through the SASA has displaced conflict about race, gender, and ethnicity to the institutional site of schools and has instead adopted a monitoring and evaluative role. It has created semi-government structures to ensure compliance with policy goals. However these structures have been criticised for being reactive and not proactive which basically points to the lack of initiative. Therefore, inherent in this critique is the view that, this policy initiative while having its positive aspects may not be very successful in reducing the effect of different wealth levels but that instead there is a semblance that the loopholes will lead to a widening of this gap and its effects. Appeals to democracy, justice and equality may be genuine but may be influenced by the political desire to prove the progress of transformation.



#### **4.6 SUMMARY**

The foregoing discussion has attempted to evaluate the reasons why education policy intervention through the SASA may not be successful in bringing about equity and democratic governance into education in South Africa. It has been argued here that educational decentralisation in the South African context, a transition context, may result in greater educational inequities. Further, the thesis argues that these inequalities will be defined along the lines of race and class, which clearly show the stark contrast in the resource levels of South African community.

## CHAPTER 5

### 5.1 CONCLUSION

The following chapter summarises and discusses the main, salient findings obtained in this thesis by putting together the results from the previous chapters. The chapter attempted to draw some relationships by showing how the findings and conclusions relate to the literature and theory in this domain therefore, this chapter attempts to show the connections between the findings and the literature review in Chapter 2. The Chapter also discusses gaps, anomalies and or deviations in information analysed and reveals any surprising results. This information is juxtaposed against known theoretical findings to assess whether it confirms or deviates from the expected. Further, this chapter makes larger significance of results by making significant policy recommendations and other recommendations.

The preceding chapter tends to support the argument that there are serious fundamental weaknesses in the analytical framework and subsequent policies initiated to eradicate the problems of inequity and lack of quality in South African education. However, as the thesis contends, this is caused by the poverty of a theorisation of the nature of the post apartheid state without which correct policies cannot be effected. Without such a theorisation it is not possible to appreciate fully the nature and effect of national policies. A proper theorisation of the post apartheid state would make clear that poverty is the major source of inequity and limited participation in school governance. It would mean that the elimination of poverty becomes the policy target. The attainment of democratic participation and equity in education can only be possible if there is a resemblance of equity in terms of access to resources hence the need to have a redistribution of productive forces.

Further education policies in South Africa have also been influenced by the extra ordinary influence which neo-classical conceptions of the relationship between education and the economy has achieved over the general understanding of the meaning and role of education

in society. As such policies implemented tend to contradict the revolutionary intentions of the liberation movement. This thesis acknowledges that the current policy developments are important and crucial to the transformation of South African education. However it acknowledges too that policy evaluation and analysis is a continuous process and suggests below an alternative approach. While this approach is not entirely new it should be applied in unison with the approaches already existing so that approaches compliment each other.

It is my contention in this thesis that due to the fact that all public social policy is founded in an underlying concept, it can be discerned that the South African education policy process is characterised by a lack of critical discourse about the nature of the post apartheid state. It is this critical discourse that can assist in the definition of the policy problem and therefore the limits and possibilities of social policies would also be realistic. Given the globalisation concept, this critical discourse will also allow for contextualised understanding of the nature of the relationship between the state and the markets and how such a relationship can influence policy making in the context of a developing country in which poverty prevails and where there is a stark contrast in the access to resources between social classes. Most important, such critical discourse will determine the deliberate social choices that a state can take and what they represent and this is what informed the creation of the SASA of 1996 and the subsequent education policies. Through the limited application of such critical discourse, currently, there is little or no examination of the structural constraints which are objective in nature and which emanate from the actual conflict of interest at the heart of the problem of reconstruction. In this alternative approach, the class and social nature of the community, the levels of income and wealth in the community and the nature of history must be examined and educational policies devised from such an examination.

As noted in Chapter 4 a major limitation of current South African education policy in general and the SASA in particular is that although focussing on social and cultural concepts of

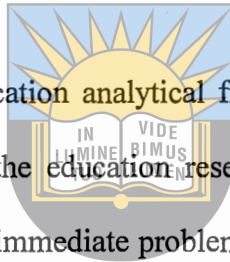
education these are essentially concerned with the measurement of outputs relative to investment. There is a concern more for the present than the long-term policy implications. However, what is most important to the effective policy at present is that the issues of class, rural and urban poverty and wealth levels and spread of opportunity must be considered if policy is to be effective and lead to real change. To achieve this, policy initiatives must examine the structural constraints that are objective in nature which emanate from the actual conflict of interest at the centre of the problem of reconstruction and reform in South African education. While formal questions can be asked and have been asked, about how many SGB committees exist who is in them, their racial composition, area spread, regularity of meetings, how they function, key items on their agendas, there are even more difficult questions that can and need to be asked. Focus can be directed at the class and social nature of the community and their specific implications for educational decision-making.



The analytical framework and subsequent policy has a weakness in that they are informed by audits and evaluations that relate only to the observable and quantifiable indices. As such much policy response, which is central to the SASA and other policies, relates to the need for classrooms and other physical facilities such as libraries and laboratories, educational qualifications, teacher numbers and it is such analysis that has influenced the formulation of the SASA of 1996 and its implementation. However, there is a significant gap in that there is a lack of assessment of the social setting within which these deficits occur. One reason could be that such issues are considered too obvious therefore taken for granted. As has been argued there is need to rectify infrastructural deficits but this can not be done just by the installation of new infrastructure alone as this may be insignificant if no consultations have been made. The effect of such a weakness is that the SASA of 1996 and resultant policies have not made priority the desire to eliminate poverty and hence have a community that has equal access to resources. Instead the policy initiatives have loopholes that are continuously

exploited and subsequently result in the entrenching of the inequality. An observation has been made that explains the context within which the SASA was formulated. It was formulated in times of crises between the fulfilment of political agendas as well as attempting to sustain socio-economic development in South Africa. However in times of crises as when the SASA was launched, and as Jansen (2000) argues, educationists and policy makers get involved in

...something more urgent and practical, particularly where educational provision is manifestly inequitable and frequently inadequate. Their immediate concern is with school improvement. And their immediate problems improving schooling are problems of means, not ends... (Jansen, 2000:p.3)



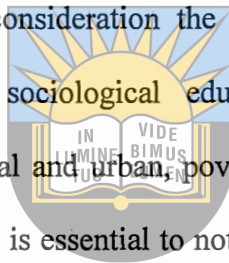
This is the situation that faced education analytical framework and subsequent policies in South Africa. This has influenced the education research and present policy making and analysis to erroneously focus on the immediate problems and demands of educational reform and very little attention is being paid to possible long-term effects of reforms currently underway. This is also influenced by the observation that South African education reform was reduced to a matter of policy implementation.

Politicians were under pressure to produce demonstrable innovations in a short space of time and as a result in the name of change and redress they went on to hastily borrow from foreign concepts without adequate research... (Kallaway et al., 1997: 1).

This observation emanates from the circumstance surrounding the introduction of the SASA of 1996. Education systems are strongly linked to the societies within which they operate and therefore their historical, political, social and cultural settings must be well understood and they must influence processes in education. As a result the goals of education have been relegated to no more than goals of national economic growth without any reference to the broader humanistic goals of learning in any society. This, it has been argued is particularly relevant in the South African society, a society that requires the entrenchment of such goals because of its specific and traumatic history.

However it is important to note that such policy limitations are not peculiar to South Africa alone. Due to independence South Africa like most other independent African states is more susceptible to the worldwide market forces, the dominant forces of global production, and distribution. As argued earlier in the paper and deducing from developments in education, its existence in such a world will witness the development of greater social differentiation in the delivery of public service even while the process of reform is in progress. It is therefore relevant to conclude this thesis by proposing an approach to education policy making.

Given such weakness it is essential to develop a more fundamental approach to education policy making that will take into consideration the theorisation of the state during the transformation (transition) period, sociological education policy that will take into consideration differences such as rural and urban, poverty and wealth levels, the spread of opportunity and categories of class. It is essential to note that after 1994 new forms of social stratification needed a new form of policy response otherwise new policy initiatives would entrench the differences.



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As envisaged in this thesis, any new approach must take into consideration the relationship between the state, education and the economy, that to achieve democratisation in schools there must be equity, which can only be achieved by way of redistribution of resources such that the South African community can have equal access to resources. Unless such a situation is created the attempts to achieve democratisation of school and equity in education may not be successful. There has to be an equal response in other social sectors to the initiatives made in education.

It is also postulated that the analytical framework and subsequent policy must acknowledge the different form of social stratification that characterises South African community at present. There is a new form of social stratification based on wealth that will hinder the attainment of equality and quality in education. It has influenced the negative results that

some of the policies have had because parents who can afford have simply moved their children to those schools where they were previously discriminated against by way of fees. This has left the village and township schools with even lesser resources.

There should be acknowledgement in this new approach of the intrinsic contradictions that face transformation states. These contradictions are deeply intrinsic to the post apartheid state and must be adequately theorised and so assist in the understanding of such a state more fully and therefore, lead to policies that are not contradictory. In South African education this contradiction has been shown by the fact that the some aspects of the origins of SASA contradict the state of the social fabric in South Africa. Further, generally education policy in South Africa concerns itself more with evaluating the status quo and fails to account for the source of the status quo, meaning that the centre of the problem of transformation is not being attacked.



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Lastly the new approach to education policy must also acknowledge that analyses in the domain of education cannot be informed by questions about educational issues alone. The school register of needs clearly shows that there are other social development indices that influence the effectiveness of education policy. As such while education policy may be well intentioned and well worded its success is influenced by such factors as the availability of water, electricity and communication facilities among other indices. Understanding educational situations implies a critique of state policies in several other domains as they relate to education. This calls for multi-disciplinary, collaborative and unfragmented research and enquiry.

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