EDUCATION POLICY DEVELOPMENT IN SOUTH AFRICA, 1994 - 1997

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DECLARATION

This thesis is my own work, written under the supervision of Professor DA Meerkotter and Professor HD Herman. I submit it to the University of the Western Cape for the Degree of Philosophy (DPhil). It has not been previously submitted, either in part or whole, for any degree or examination at any other university.

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ABSTRACT

Black South Africans have been exposed to an unequal and divided education system. It has been expected that the basis for an equitable education system would be laid in the post apartheid period. In this thesis I have provided an analysis of education policy development in South Africa between May 1994 and mid-1997. My main aim has been to understand the policy vision that the post apartheid state has enacted as the basis for educational reconstruction.

The conceptual framework of this thesis is located in the academic fields of Education and Development and Policy Sociology. I have focused on the interaction between the broad delimitations set by the structural, economic and political dimensions in society on the one hand, and the political and policy dynamics that have given education policy its specific meaning on the other hand. The role of the government in enacting a specific policy vision has been at the centre of my analysis.

The government has effected a conservative vision with the adoption of the Growth, Employment and Redistribution (GEAR) macroeconomic strategy. GEAR has targeted the development of an export-based global economy along post fordist lines. Predicated upon an emphasis on fiscal discipline, the dominant policy orientation has supported equity but without an emphasis on redress. This approach has not provided the necessary basis for education reconstruction.

The National Qualifications Framework (NQF) and Outcomes-based education (OBE) embody a definite vision in terms of which education policy would be aligned with economic development. This vision is based on the false assumption that education should play a fundamental role in producing the sophisticated labour demands of a globally competitive economy. The logic of both GEAR and the NQF is internally inconsistent and the relationship between these two policy frameworks is unsustainable. By mid-1997 a definitive narrow and conservative education policy vision had been established which would impede the development of an equitable education system.

Education policy 'narrowing' has not been achieved easily, nor has its outcome been inevitable. The specificity of the political context and policy processes has shaped the policy outcomes. A moderate constitutional dispensation has impeded the possibility of developing a radical policy vision. The semi-federal powers awarded to the provinces have led to incongruence between national and provincial policy. Court challenges aimed at protecting historically acquired educational privileges, have been brought by conservative groups against national education legislation. The apartheid-era

bureaucrats, whose jobs were protected by the negotiated constitution, have impeded the development of progressive policy. They brought the conservative policy reformism of the apartheid state into the new policy processes.

The NQF has been developed on the basis of a policy consensus between labour and capital in support of skills training and upgrading of workers. Participation in policy processes has been determined on the basis of identified stakeholders This has given rise to a technicist policy approach that has excluded many interest groups, academics and professional experts. Most teachers felt alienated by the curriculum policy process.

Policy has been developed in a reconstituted civil society. The progressive education movement has been demobilised, and its place has been taken by a constellation of conservative forces who have used the moderate political climate to advance conservative policy interests. The government has had to make policy within a constrained political and policy environment.

With regard to the main conceptual underpinning of this thesis, i.e. the relationship between equality and (economic) development, it is clear that the government has favoured the development dimension in pursuit of an education framework that would aid the generation of a globally competitive economy. Social equality has thus been sidelined. I have advanced the view that where the government has reneged on the delivery of the social welfare and educational demands of an expectant polity, education policy has manifested as a means of compensatory legitimation at the symbolic level to 'signal', rather than give effect to, real change. In my analysis of school access and school curriculum policy, I have suggested that policy has been limited to 'signalling' a commitment to a reconstructed and equitable education system. This has masked the conservative framework that has come to underpin education policy by mid-1997.

ABBREVIATIONS

ANC:	African National Congress
APET:	ANC Policy Framework for Education and Training
CDC:	Curriculum Development Committee
CEM:	Council of Education Ministers
CEPD:	Centre for Education Policy Development
CFC:	Consultative Forum on Curriculum
CNE:	Christian National Education
COLP:	Culture of Learning Programme
COSAS:	Congress of South African Students
COSATU:	Congress of South African Trade Unions
CUMSA:	Curriculum Model for South Africa
DoE:	Department of Education
ELRC:	Education Labour Relations Council
ERS:	Education Renewal Strategy
FET:	Further Education and Training
FP:	Fundamental Pedagogics
GEAR:	Growth Employment and Redistribution strategy
GET:	General Education and Training
GNU:	Government of National Unity
HCT:	Human Capital Theory
HEDCOM:	Heads of Education Departments Committee
HET:	Higher Education and Training
HSRC:	Human Science Research Council
IPET:	Implementation Plan for Education and Training
LAC:	Learning Area Committee
LDCs:	Less Developing Countries
MCMF:	Middle Class Mandatory Fee Clustering
MNC:	Multinational Company
MTEF:	Medium Term Expenditure Framework

NAPTOSA: National Professional Teachers Organisation of South Africa
NCDC: National Curriculum Development Committee
NECC: National Education Coordinating Committee
NEPI: National Education Policy Investigation
NETF: National Education and Training Forum
NICD: National Institute for Curriculum Development
NOLA: National Open Learning Agency
NP: National Party
NQF: National Qualifications Framework
NSGB: National Standards Generating Body
NTB: National Training Board
NTSI: National Training Strategy Initiative
OBE: Outcomes-based education
PGE: Provincial Gazette Extraordinary
PTR: Pupil-Teacher Ratio
RDP: Reconstruction and Development Programme
RDPWP: White Paper on Reconstruction and Development
RIEP: Research Institute for Educational Planning
SADTU: South African Democratic Teachers Union
SAQA: South African Qualifications Authority
SGB: Standards Generating Body
TC: Technical Committee on Standards and Frameworks for Learning Programmes
WPET: White Paper on Education and Training

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Chapter 1: Introduction

Education in South Africa is expected to play a key role in the overall transition from apartheid to full democracy over the next few decades. The installation of the mechanics and institutions of a political democracy since the 1994 election provided the possibility of developing an agenda for national reconstruction. Contemporary education policy discourse reflected the complexity involved in giving effect to this reconstruction agenda. While the trajectory of change in education was unexpected, the dynamics that constituted policy is largely misunderstood. Engagement in educational politics and policy processes necessitates greater understanding of these dynamics. This thesis is guided by the political imperative to provide an understanding of the discourses and processes involved in constructing education policy in order to furnish an intellectual basis for a more effectual educational politics.

The main aim of this thesis is to give an analysis of education policy development in South Africa between May 1994 and mid-1997. The focus is on the post apartheid state's policy vision for the reconstruction of an equitable and united education system. The thesis revolves around understanding the nature of policy that underpins the government's efforts in laying the basis for a reconstructed education system. The main question is: does education policy provide a tenable basis for educational reconstruction? The parameters in terms of which my analysis unfolds are threefold: 1) the policy context in which this policy vision was enacted, 2) the competing ideological and political discourses surrounding policy making and 3) the nature of the policy process. The dynamic interaction of these three dimensions played a key role in constituting education policy.

A principal dimension of the thesis is a consideration of the efficacy of the democratic state in developing a political vision and praxis that is allied to reconstruction. At the risk of lapsing into statism, i.e. explaining social relations and institutional functioning as primarily determined by the state, I am of the view that the post apartheid state is the most important instrument in providing a tenable education policy framework. This is not to deny the ability of human beings to shape their own destinies, but I focus my analysis on the macro context which circumscribes human actions. My analysis is trained on the construction of the macro context in the post apartheid period. An analysis of the role of the state in education policy development provides one with an understanding of the particular policy direction and social values that acquired state-sanctioned authority to construct the educational terrain. This is notwithstanding whether it will be implemented unquestioningly by some or openly flouted by others. That the state does not make education policy without contestation is indicative of the symbolism inherent in education. Education policy, more than any other social policy, embodies an ideal statement about the direction of a country's values and political commitments. Overall, I set out in this thesis to consider the role of the state in education policy making[1].

The notion of 'settlement' as propounded by Smyth informed my decision to delineate the period between May 1994 and mid-1997 for analytical scrutiny. I contend that the period is characterised by a particular qualitative character (Smyth 1995: 43). This provides a platform to analyse education policy as distinct from policy made outside of the period. By mid-1997 a range of substantive education policy had been legislated that had collectively established a definitive policy vision. But by then the broad consensus, which Smyth calls the "unstable truce between social forces" (1995: 43), in terms of which education policy was developed despite intense contestation over its outcomes, showed signs of breaking down under the weight of mounting criticism against the underlying vision and direction of education policy.

The post apartheid period derives its distinctiveness from the establishment of an inclusive political democracy. Public and education policy in the period under review should be understood within the context of two interrelated contextual dynamics. Firstly, as Nkomo argued in 1990, a reconstructed education system must be grounded "on a firm understanding of the genesis, evolution and the nature of the current educational arrangement and the crisis it has produced" (1990: 291). As a response to the specificity of the legacy bequeathed by apartheid education, education policy should be evaluated in regard to its ability to lay the foundation for the genesis of an equitable education system over the next few decades. Secondly, the post apartheid period brought South Africa directly into a reconstituted global environment. Like any other country in the south, South Africa's policy vision can be discerned by looking at the way it mediates pressures to align its education policy with the neo-liberal discourse that is a key element of globalisation. Fundamentally, the global hegemonic discourse imposes structural conditions and social relations in line with the global capitalist economy (see para 2.5). Thus, an important dimension of my analysis is the relationship between global influences and national policy dynamics involved in shaping education policy.

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[1]. While this thesis focuses on education policy development in the broader sense, analysis of aspects related to schooling is a major part of the thesis. Most of the education policies in the period I focus on were legislated in the area of schooling.

The policy conceptualisation that my analysis is predicated upon revolves around the relationship between the concepts of equality and (economic) development. I argue that a preference for either of the two would have negative consequences for education policy. On the one hand, where the unfettered pursuit of social equality is the conceptual pivot, education policy would fail to differentiate among competing priorities. It would, for example, be difficult to decide whether to increase funding for higher education or basic primary education. Equality-based policy does not provide a basis to make tough choices in a financially stringent environment as it regards all claims to redress as equally important. On the other hand, where policy is dominated by development, it would be tied very closely to the pursuit of economic growth which would have two negative outcomes. It would spawn policies that are based on the neo-liberal quest for a smaller state that would result in a reduced commitment to public education. And, it would imbue education with a purely instrumental role in facilitating economic development and growth of which the vocationalisation of education would be the main outcome. I support the view that macro education policy should keep equality and development in tension and that a complementary development path enacted by a strong state should form the principled basis of education policy. The logical consequence of this position, I believe, is to locate educational reconstruction within an overall socioeconomic development programme that takes account of the embeddedness of existing power relations.

My approach to policy analysis is based on the critical policy sociology tradition which is derived from a political commitment anchored in a vision of a moral order in which justice and equality for all are uncompromised by the rapacity of small groups of individuals (Ball 1994: 2). The critical analyst subscribes to the view of social reform that targets the development of economic, political and social institutions and relations in which persons are treated as ends in themselves and not as means to an end (Prunty 1985: 136). Not bounded by a single theoretical tradition, critical policy sociology draws on a range of perspectives, including world institutions theory and Marxism. It sets itself the task of examining the moral order of reform and the relationship of reform to existing patterns of inequality (see Ball 1994: 2-4). Its theoretical frame is based on a dynamic interaction between the structural and economic dimensions in society which set broad delimitations, and the relative autonomy of the sphere of the political and ideological in giving shape to education policy. While education policy is shaped within the structural parameters, its specific form is determined by the politics of the policy making process. This thesis embodies an analysis of the interaction between the structural and political dimensions of policy.

The thesis is based on an analysis of policy as text as opposed to policy as discourse. The latter is concerned with the nature of policy interaction at the level of practice subsequent to the enactment of policy. In following a policy as text approach, I concentrate on understanding the manner in which the policy context, policy processes and policy debates interact in constructing the specific policy meanings contained in policy documents. In other words, my analysis can be said to focus on the production and meaning of policy. I employ a descriptive and analytical approach in relating policy production to the eventual outcomes of policy. While I do not claim to have accessed all the data that may exist on education policy, nor do I intend my thesis to be an empirical analysis, I nonetheless base my analysis on the relevant primary education policy documents produced in the period under review.

In Chapter Two I develop a conceptual framework to guide my analysis. It traverses through and brings together a number of theoretical strands within the fields of education and development and policy sociology. I start the chapter by developing an exposition of the need to conceptualise policy in relation to the prevailing material and ideological context in order to avoid policy conceptions that are founded on a false sense of what is achievable given the constraints of the real world. However, I challenge the idea that policy ought simply to be guided by a narrow agenda that issues in a reduced commitment to equality. I argue that contextual exigencies should be regarded as a site of public engagement over the meaning of education policy. I go on to locate my theoretical framework within the historiography of education and development since the end of the second world war. I discuss the shifting theoretical development in the field in relation to educational development in the post colonial world over the last five decades. Developmentalism, mostly defined outside of affected countries, emphasised different educational orientations throughout the period. Dominated by structural functionalism during the 1950s and 1960s, development stressed the positive relationship between education and social change. Modernisation theory and human capital theory formed the cornerstone of theorisation in education during this period. By the mid-1970s scepticism over the ability of education to bring about social change led to the rise of neo-Marxist analyses which emphasised the need to target overall societal development and education as a subset of this. Further theoretical development exposed the role of education in creating greater dependency and underdevelopment. Reproduction theory emphasised the link between education and the reproduction of capitalist social relations. By the mid 1980s educational resistance theorists showed how education policy is shaped through the dynamic interaction between reproduction and various forms of educational resistance.

With the reform / resistance dialectic in mind I move on to a consideration of the impact of the global level on policy. I utilise Ginsberg et al.'s (1990) world system-level framework to develop theoretical space for my discussion of the role of globalisation in national education policy development. Their perspective enables an analysis that concentrates on the interaction between international, national and local dynamics in constituting policy. Before discussing the impact of globalisation on education, I address the role of the state in education policy. I argue that the state is an active instrument in mediating the competing pressures on it when developing policy, seeking to establish 'active consent' over whom it rules. The state makes policy in a context of having to mediate among competing interests. Because the capitalist state functions to guarantee the continued viability of capitalism it must play a mediating role between its two mutually contradictory core functions, i.e. accumulation and reproduction. I support the view that in a neo-liberal context where the state increasingly becomes divorced from its ability to satisfy the reproduction requirements of an expectant polity, the state uses public and specifically education policy to regain legitimacy through symbolic action. Thus, state policy is as much about directing practice at the implementation level as it is about seeking to establish consent at the ideological level.

I provide an extensive discussion of the influence of globalisation on education policy. I develop the view that globalisation accentuates the accumulation - reproduction contradiction in favour of accumulation. This has the effect of down scaling the state's commitment to social welfare and public education. As a process that is essentially driven by changing world economic patterns, globalisation is reconstituting all dimensions of life. I use the term 'diffuse social movement' to describe the general impact globalisation has on policy. I argue that its specific influence can only be understood by analysing particular areas of policy. The next section of my conceptual framework throws the spotlight on the key issue of education policy making. I focus on definitions of policy, policy paradigms, frameworks of policy analysis and the policy process. I attempt to highlight the manner in which policy dynamics determine the eventual policy meanings. I favour the view that policy making is a value-laden process in which different ideological and political interests compete over policy. An analysis of civil society's interaction with the policy process would reveal the constellation of interests that interact with the state in order to sway policy in line with particular interests. In the final section of Chapter Two, I provide a conceptualisation of the equity and development relationship. I argue that education policy should be measured against the criterion of whether it lays the basis for a complementary development path based on keeping equality and development in tension. The challenge for the post apartheid government is whether its chosen policy path can provide a tenable basis for the reconstruction of the public education system over the medium and long term.

In Chapter Three I discuss the historical development of education for blacks[2] over the last hundred years. I argue that contemporary education policy should be developed in response to the particular legacy of racial division and the appalling quality of education produced under apartheid. Policy should target the development of an equitable education system that brings a resolution to the educational poverty to which the majority of black South Africans are exposed. I employ a political economy approach which enables me to relate educational development to the historical development of South Africa. I show that while the origins of a racially differentiated education system can be explained in terms of the nature of industrialisation around the turn of the twentieth century, mass education for blacks took off only after 1948 in the context of the new demands brought on by changing economic, political and social circumstances. Education developed over the next four decades in relation to the fluid discourse of apartheid reformism. Policy for black education developed in the context of an enduring battle between the needs of industrial capital for urban reproduction on the one hand, and the need for rigid racial separation as the principal means to secure social amelioration for the poor white problem on the other hand. During the 1970s and 1980s educational reformism attempted to relate educational development to the need to produce the necessary relations of production that would address the crisis of accumulation that characterised the period. However, the reforms were rejected by students whose resistance became tied to the intensification of resistance against the apartheid state. Despite the political failure of educational reform, it laid a discursive basis for the deracialisation of education and the concomitant closer linkages between education and economic development. I argue that between 1990 and 1994, policy contestation between the apartheid state and the democratic movement can best be understood symbolically as part of broader political negotiation over the form of a new state. The policy divergences between the two competing approaches masked a degree of convergence, chiefly around the impact of financial limitations and the need to relate education to human development needs, over the future of education policy.

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[2]. I use the term black in this thesis to refer to non-white people in South Africa. The terms 'Coloured', 'Indian', 'African' and 'White' refer to those groups of people who were classified under these appellations by the apartheid system. I continue to employ these racial categories despite their potential to perpetuate division. Without it there would be no accurate yardstick to measure targeted social improvement, equity and redress.

In Chapter Four I attempt to develop an understanding of macro-level education policy made by the new democratic government after the 1994 election until mid-1997. I base the analysis on the view that education policy should be understood in the light of broader socioeconomic reform in the period and contestation over the outcome of policy. I start the chapter by focusing on the political and ideological nature of the transitional settlement in which public and education policy was adopted. I argue that the meaning of education policy should be understood in the light of the contextual circumstances established before and during the period. The analysis is based on a discussion of the manner in which the transitional juncture was constituted by a confluence of global, national and ideological factors. The next section features detailed discussion of the policy direction adopted by the government in the socioeconomic development terrain. I assert that education policy was shaped in interaction with broader development policy. I trace the development of policy via an analysis of a number of authoritative policy documents on the government's vision of socioeconomic development. Based on an examination of the African National Congress's pre-1994 election Reconstruction and Development base document, the White Paper on Reconstruction and Development published in September 1995 and the Growth, Employment and Redistribution strategy (GEAR) document of June 1996, I show the shifting trajectory of the government's socioeconomic development policy. The GEAR document represents the government's definitive vision of its development agenda. GEAR played a catalytical role in shaping education policy.

In the next section of Chapter Four I discuss the unfolding vision that came to underpin education policy which I argue is the outcome of the 'limits of possibility' that characterised the political transitional settlement, and the specific direction of socioeconomic development established in the period. My analysis of education policy development concentrates on: 1) the genesis of the White Paper on Education and Training of March 1995, and 2) policy conceptualisation of the integration of education and training which formed the chief proposal that would drive a reconstructed education system. I suggest that the government's favoured education policy vision, consistent with the vision embedded in development policy, displays a decisive down scaling of the commitment to provide a framework to develop a united and equitable education system. The chapter then proceeds with an analysis of the policy making context in order to establish how this 'policy narrowing' was achieved. I argue that the outcome of education policy should be understood in the context of a rapidly reconstituting civil society which became dominated by conservative interests. The chapter closes with a discussion of the impact of globalisation on education policy. Over and above the general impact of globalisation on policy, I highlight a number of instances in the policy process where global factors played a direct role in giving shape to education policy.

While Chapter Four provides an analysis of the broad macro-level education policy direction, I go on in Chapters Five and Six to focus on specific policy issues related to schooling in order to show how macro-level policy cashed out in specific policy areas. The macro-level education policy framework provides the analytical backdrop against which education policy in these specific policy instances developed. I argued that the political and ideological vision established in macro-level education policy is consonant with the government's reduced commitment to building an equitable education system. Its inability to deliver a reconstructed education system would create a crisis of legitimacy for the government. Thus, the need to use policy as a means of regaining legitimacy at the symbolic level is an important frame through which to understand education policy. In Chapters Five and Six I illustrate how education policy turned out as a means used by the government to regain legitimacy and credibility at the symbolic level. Both chapters incorporate theorisation that is applicable to an analysis of the particular policy areas. Allied to the conceptual framework provided in Chapter Two, I use a 'politics of curriculum' approach in Chapter Five to analyse school curriculum policy and in Chapter Six I employ Fuller's notion of the 'fragile state' to understand the government's policies on school access.

Chapter Five focuses on school curriculum policy. I analyse the curriculum policy processes between mid-1994 and July 1997 that led to the promulgation of 'Curriculum 2005' as the official school curriculum framework. My analysis is based on an interpretation of the relevant documents and a series of interviews with senior curriculum bureaucrats in the National Department of Education and with representatives of teacher organisations, publishers and subject associations who participated in the various curriculum policy processes. There were two distinct but interrelated policy processes. The first produced a revision of the existing syllabi which was limited to expunging racist and sexist language to bring them in line with the values of the new Constitution without making radical curriculum changes. While the changes were largely cosmetic, I argue that this process should be regarded as precursor to a larger struggle over the outcome of curriculum policy that was to take place in the next process which ran between July 1996 and July 1997 and which produced the new curriculum policy. The new curriculum policy proposes a radical shift away from the apartheid curriculum. Its two main features are the move away from the traditional subjects to integrated learning areas and the introduction of Outcomes-based education (OBE). I argue that the policy process was dominated by what I term a 'managed participation' approach through which decisions made outside of the curriculum processes was legitimated. I also question the epistemological basis of the hybrid version of OBE that was adopted in South Africa. I suggest that OBE embodies a narrow technicist pedagogy. I argue that the 'insupportablility' of the level of practice, i.e. teachers and schools, will see the new curriculum being undermined at the level of practice. Finally, I show that the government's curriculum policy can best be understood as a means of restoring credibility to the Education Ministry who until then had been seen as ineffectual in laying the basis for educational reconstruction. Curriculum policy, because of its inherent ability in projecting future commitments and values, was utilised in a compensatory manner, to shore up the flagging image of a Ministry suffering from a lack of credibility.

Chapter Six concentrates on the important issue of access to schooling. Policy development in this area provides a key measure of a government's commitment to developing a just society. Primary schooling is one of the chief pillars in a nation's quest to provide acceptable living conditions for all its citizens. This is especially applicable in South Africa in the light of the vast disparities that exist between the education systems of whites and blacks. Thus, equalising and unifying the schooling system has high moral purchase. I pose the question as to whether school access policy enables the development of such a system. In order to trace the government's policy on access I discuss the White Paper on Education and Training's view on the matter. I come to the conclusion that it has a coherent and realistic conceptual approach to phasing in 'equitable access' to schooling for all. I use the White Paper's approach as an analytical benchmark to assess the government's subsequent policy and practice in giving effect to school access. Through an analysis of three policy aspects that are central to the development of school access, i.e. school funding, teacher rationalisation and the Culture of Learning Programme, I set out to understand the manner in which the government chose to give effect to providing equitable school access. I conclude that in the context of GEAR's preference for reduction in social spending, the government significantly down scaled its stated commitment to an equitable schooling system.

Chapter 2: Towards a conceptual framework for education policy analysis

2.1 Introduction

In this chapter I develop a conceptual framework that will guide my analysis of education policy development in the post apartheid period.

The theory-building pursued here is located in the academic area of Education and Development which evolved over the last fifty years. Education and Development focuses on the question of educational change, 'modernisation' and expansion in the post colonial world[3], as well as the link between education and overall social, political and economic change.

The chapter begins with a discussion of the impact of 'contextualisation' on Education and Development. I argue that education policy should be located within a 'sociology of possibility' that is aimed at inserting equality at the centre of educational reconstruction. The chapter then sketches the main outlines of the historiography of Education and Development. As academic genre historiography emphasises the crucial link between theorising and context. It gives credence to the idea that conceptualisation arises out of and is embedded in specific contexts. In the case of the academic field of Education and Development, it is the changing context around education in the post colonial world that provides the backdrop and contingent forces in terms of which the shifts, continuities and discontinuities in educational reform can be understood.

The impact of globalisation on education policy is at the centre of educational reform in the south. Globalisation establishes limiting political and economic parameters over the entire public policy edifice including education. Globalisation affects policy to the extent that it consolidates and advances economic development at the expense of equality. The chapter outlines a notion of the equality / development relationship that takes the neo-liberal influences of globalisation into account. In order to sustain the equality / development tension, I develop a conceptualisation of policy that attempts to challenge these influences. I present an outline of Ginsberg et al.'s world systems level approach which I believe opens up space to theorise about the role and impact of globalisation on education.

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[3]. Various terms have been used to refer to countries that have lived through colonisation. Some of these terms, mostly used in a pejorative manner are: underdeveloped, third world, backward, marginal and peripheral. I have chosen to refer to these countries in two ways, i.e. as countries of the 'south' or as 'less developed countries' (LDCs).

The chapter also focuses on the central role of the state in education policy. I advance an understanding of the state which attributes 'relative autonomy' to the educational sphere (in relation to the economic sphere) in shaping social structure. Education policy contributes to the overall formation of society within structural context. The concept of relative autonomy enables an analysis of education which is not simplistically understood or read off against the economic structure. Next, the chapter discusses the education policy making process. I focus on defining policy, types of policy, different models of policy making, policy contestation and the contexts of policy making. The nature of policy making has a fundamental impact in determining policy meanings. The final section concentrates on the equality / development conceptual relationship which determines the extent to which education policy is able to adequately address the equalisation of education.

2.2 Education and Development in context

In an attempt to avoid nebulous conceptualisation, it is necessary to understand education and development within the specific exigencies of the global, national and local context. Development policy is aimed at altering the social terrain along certain predefined lines. It seeks to introduce certain values into the public domain. Government policy strives to become the dominant player in the realm of allocating national values. Policy implementation, however, is in large measure dependent upon whether the environment is conducive and responsive to the policy. Despite its best intentions, new policy will not have the desired effect if it does not take the specificity of the context into account. Development projects in the post colonial world suffered greatly as a result of subscribing to what is termed universally applicable knowledge (Esteva 1993: 6) and thereby ignoring the contextual.

Embedding policy principles within the contextual would establish a policy climate that avoids what can be termed political triumphalism. This refers to the pervasive practice of many nations in the south who embarked on radical political change immediately after independence. Led by nationalist, and often socialist, liberation movements and propelled by a discourse of equality, these nations introduced ambitious national development projects. In effect, they attempted to 'catch up' with the developed world in a very short timespan, and in vastly different contexts. After decades of this type of 'developmentalism' most of these nations failed to register any reduction in poverty, let alone progress in national development (Esteva 1993:1-9).

Contextualising development is a fundamental requirement for locating policy within the realm of a 'sociology of possibility' (Howard 1997: 4). Instead of political triumphalism, a sociology of possibility acknowledges the complexity of pursuing development in terms of what could realistically be achieved. There is little value in adopting policy options that are unachievable in practice. Public policy should exhibit sensitivity to what can be achieved in practice. It thus turns out that policy conceptualisation is partly determined by implementation dynamics. According to Weiler, contextualisation "will allow us to conceive of policy actions as an integral part of the process of generating knowledge and of testing it against the harsh standards of reality" (1985:16). He adds that this procedure establishes

> ... a new mode of the connection between theory and practice. Intellectuals have got to get used to working, not in the modality of the 'universal', the 'exemplary', the just-and-true-for-all, but within specific sectors, at the precise points where their own conditions of life or work situate them. This undoubtedly gives a much more immediate and concrete awareness of struggles (1985:17).

The weakness of universal discourses is precisely in the fact that their policy prescriptions override the local or national reality. This leads to development planning that has far greater consonance with the loan and aid community of the north's perceptions of what should to be done, than with the south's internally determined priorities (see Graham-Brown 1991: 3-25). Universally driven and 'generaliseable' policy neither succeeds in alleviating the poverty-stricken conditions in LDCs, nor does it provide a platform for national development.

I am not suggesting that policy should necessarily forego the pursuit of a normative agenda that aims to align the country with a sustainable development project. Emphasis on the contextual could easily issue in a diminishing commitment to social equality and national development. The context could be construed in such an intractable manner as to lead to the formulation of fatalistic policy prescriptions which remain at the level of stabilisation measures aimed at ameliorating an austere environment.

Avelos (1992) points out how a discourse of 'pragmatic realism' influences education policy in the context of continuing poverty in the south, informed by a rationale of doing "only what we can do now given the circumstances" (1992: 420), with poverty and economic failure justifying limited reform measures. This approach treats context in a manner that champions a reduced commitment to equality in education.

Avelos is concerned to show that despite existing conditions of poverty, education ought not to "yield to the pressures of circumstances and accept with the pragmatic realists that lower ceilings must be given to the quality of schooling provided for the poor" (1992: 432). Pragmatic realism would result in policy based on "quick and cheap solutions to educational problems which in fact may not be solutions at all" (1992: 421). This approach, I contend, will lapse into a position of relativism which will allow any government to discriminate between children from different backgrounds. Children of the elite, for example, would receive good quality schooling because of their ability to either pay for private schooling or augment through fee paying the public schools they attend. Children from impoverished backgrounds would have to be satisfied with a low quality education system which would have a negative effect on their life chances. Thus, pragmatic realists use a contextual argument to institute austerity policies[4] that further erode the educational possibilities of the poor. The contextual argument I am suggesting is not intended to lapse into this type of corrosive policy environment.

Locating the context of education is necessary for identifying an appropriate framework to reinsert equality as a cornerstone of education policy. While I acknowledge the pervasiveness of endemic poverty and the projected intractability of economic development in LDCs, and while I accept that this difficult context shapes what is achievable, I do not concur with the view that education should be given lower priority or be subjected to unworkable austerity measures such as a reduction in state financing for education, the emphasis on quantity at the expense of quality education, private education, multiple shift schooling and increased Pupil-Teacher Ratios.

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[4]. This type of policy which is driven by a neo-liberal ideology in the context of globalisation will be elaborated further-on in this chapter.

I support a conception of education that challenges the hegemonic 'neo-liberal' assumptions embedded in current policy, and which is advocated as the panacea for economic growth in the era of globalisation. Current research, specifically as reported in the 'International Journal of Education and Development' over the last two decades, shows unequivocally that austerity measures had a disastrous impact on the ability of LDCs to sustain an equitable education system. For example, the education systems of many countries in sub-Saharan Africa has disintegrated under the impact of austerity measures (see Graham-Brown: 1991).

My keenness to avoid a triumphalist approach is driven by my concern to generate a policy conception that takes the constricting impact of the policy environment into account. Samoff puts it thus:

> To protect and expand education and training requires a fuller understanding of national and local responses to financial crisis and economic reorganization and of the international economic and political environment that circumscribes those responses (1994: 5).

The reinsertion of equality into policy in a constricting context is motivated by a commitment to human rights for all. The Universal Declaration of Human Rights of 1948 and The Declaration of the Rights of the Child of 1959 sponsored by the United Nations, established access to free and compulsory education for all as a fundamental human right (Ray and Tarrow 1987: 37). While the precise meaning of this right has been contested since the publication of these declarations, development agencies had committed themselves to accomplishing the universalisation of a minimally acceptable notion of educational development. The project to provide basic primary education for all children embarked upon from the 1950s gave expression to the desire to universalise education and thereby accede to the right to education for all. This project faltered during the mid-1970s and slid backwards during the 1980s when enrolment for basic education decreased sharply (Najfizadeh and Mennerick 1988: 337). This could be read as an indication of a reduced commitment to education and development and thus to education as a human right, as much as it could be read as part of the failure of overall development in LDCs.

In underscoring the way a dilution of the meaning of 'education as a human right' under the influence of pragmatic realism turns out in the LDCs, Guthrie makes the following compelling observation:

> Most education for the poor (as depicted, for example, in studies of classroom teaching showing emphasis on repetition, word and skill learning) remain purely at the level of developing basic capacities and skills to cope with a restricted everyday world. Even more so, it is often considered that this is the appropriate way to teach the children of the poor; with emphasis being laid on structured teaching geared towards the achievement of specific behavioural objects, or on 'formalistic' teaching as being more appropriate to those children (Guthrie 1990: 228).

The type of education referred to in the above quotation will neither enable individuals to develop the necessary competencies to function successfully in an ever changing global economy, nor will it contribute to the national development of LDCs. It will simply end up in contributing to the further perpetuation of these countries' underdevelopment.

A recommitment to the notion of education as a human right[5] requires an alignment with Weiler's position in which he urges development practitioners, including academics and policy makers, to be "unabashed advocates for the importance of education as both a human right and as a means of human liberation - over and above, and indeed, regardless of its development yield" (Weiler 1985:16). While education cannot simply be driven by equality to the exclusion of economic development and growth, the latter cannot be allowed to dominate education policy in the south as it currently does. The human rights position advocates a conception of education and development that puts the interests of people first as opposed to the interests of capital accumulation. In this light 'the contextual' ought to be regarded as a site of public engagement over the nature of education policy in the interest of overall socioeconomic development based on equality.

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[5]. Education as a human right is interpreted to mean the equitable provision of a minimally accepted level of quality education to all children. This view is in contradistinction to the understanding of the provision (or lack of provision) of education as only determined by what can be afforded given the context of poverty in many LDCs.

The view that the contextual provides justification for the limiting aims of economic growth ought thus to be resisted.

In pursuit of education policy based on a sociology of possibility, I focus in the next section on the theoretical development of Education and Development. This provides a prelude to and foundation for my conceptual framework which I develop in the later sections of this chapter.

2.3 Education and Development in historiographical perspective

This section provides a discussion of the theoretical development of Education and Development. I start with a brief overview of the intellectual roots of Development. This is followed by an outline of the various dimensions of Education and Development. I then discuss the theoretical contours that undergirded Education and Development between the 1950s and the 1990s. I show the interaction between the dominant theoretical models and the related education policy patterns applied in LDCs in the period under review.

2.3.1 The origin and focus of Education and Development

As an academic discipline Education and Development has had a chequered historiography over its five-decade existence. Its modern origins can be traced back to the postwar era in the late 1940s and the decolonization of countries in the colonial world. Persuaded by the colonies' full and courageous participation in the second world war on the side of the allied powers, their vigorous liberation struggles for political independence and the economic ineffectiveness of continued colonial rule, colonial powers granted independence to their colonies. Independence was not granted before structures for neo-colonial relations were put in place that would continue relations of exploitation (see Watson 1984). Development projects in the newly independent countries became part of the broader contestation between the two power blocs for global supremacy. The LDCs became the playing field for the ideological battles that formed the cornerstone of the cold war between the 1950s and about 1989. After the collapse of the Eastern block and state socialism in 1989, the capitalist West assumed global ideological and political hegemony.

The West, through agencies such as the International Bank for Reconstruction and Development established in 1946 (now known as the World Bank), embarked on wide scale support of development programmes in the LDCs. This ushered in a relationship between the West and many LDCs that had an enduring impact on the nature of development in these LDCs. This relationship had the effect of imposing a specific development trajectory. The West primarily aimed, through its support for development, to counteract the ideological threat posed by the expansionist policies of communist Russia. An adapted and diluted version of the Marshall Plan through which postwar Europe was rebuilt underscored development in the south, which led Sachs to remark that "the metaphor of development gave global hegemony to a purely Western genealogy of history, robbing peoples of different cultures of the opportunity to define the forms of their social life" (1992: 9). This is not to deny the impact of the many other contending social and ideological forces on development in LDCs during the last five decades. However, western-inspired development driven by ideological considerations had a major influence on development policy and practice.

As an academic discipline Education and Development concentrates on the role of education in the national development of post colonial nations[6]. Thus, the discipline resorts under the broader academic rubric of 'Development'. The origins of development thought can be traced to Aristotle in ancient Greece who is credited as the first theorist of the state (Fagerlind and Saha 1989: 7). For classical philosophers such as Aristotle development takes place in cyclical patterns which involve the growth and decay and eventual re-emergence of civilizations (Fagerlind and Saha 1989:7).

The renaissance heralded a period of optimism with regard to the possibility of the endless advancement of humankind and in the ability of the earth's resources to sustain such advancement. This gave rise to a positive connection between development and human progress. The type of theories of change that emerged after the renaissance is reflective of the period's optimism. Philosophers such as Kant, Rousseau, Confucius and Ibn Khaldun developed elaborate theories in which they expressed their optimism about development (see Nisbet 1969).

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[6]. In the literature the term 'education and development' is sometimes used interchangeably with 'educational development' which I believe is misleading. While there is an inextricable connection between the two terms they denote separate things. Education and development refers to the relationship between the two variables. A longstanding debate has been raging around the specific nature of this link (see Weiler 1977). Educational development refers to the dynamics internal to education, to the development of individuals and systems.

Colonial countries justified their paternalistic behaviour over their colonies on the basis of evolutionary theories of development which were prevalent during the nineteenth and twentieth centuries (Fagerlind and Saha 1989: 13). The central idea of evolutionary theory was that "nonindustrial societies were seen as representing a primitive stage of evolution, while the industrialised countries were associated with a more complex and civilised stage" (Fagerlind and Saha 1989: 13). Buoyed by this type of theoretical justification, colonial countries proceeded to usurp the colonies' material resources to develop their own countries. This happened to the detriment of the colonies who, as dependency theorists showed, continue to suffer to this day as a result of these exploitative relationships (Frank 1967: 15).

During the last five decades 'developmentalism', under the pervasive influence of the north, propelled LDCs to achieve development requirements. History shows that such development was less than successful, in fact, most countries in Africa have a dismal record of failure. This record gave rise to a deep scepticism over the ability of continuing development to solve the problems of LDCs. Development also became discredited in the face of a deteriorating global ecological environment. Due to the realisation that continued development cannot be sustained by finite and diminishing global resources, ecologically inspired movements in the north have been advocating for the 'end of development' (see Sachs 1993). This contributed to the general scepticism that is currently pervading development discourse.

Education and Development is a sub-component of the development rubric and must thus be understood within broader development context. The nature of the relationship between development and education has been the subject of intense debate over a long period, which revolves around the following questions: what role does education play in social change and development, and how should this relationship be conceptualised? Theorisation during the 1960s and early 1970s preferred a very positive role for education in national development, by positing that education will spearhead social development. But, during the 1970s, as a result of the failure of many educational projects, a mood of cynicism crept in. Weiler (1978) coined the phrase 'the age of scepticism' to signal a growing incredulity over the positive role education is supposed to play in national development. He argues that education follows, or ought to follow, national development and not the other way around. The International Encyclopaedia of Education makes the following observation regarding the relationship between education and development:

> ... what was once thought to be a simple cause-and-effect relationship is now seen to be a complex one, and contingent upon many factors, not the least being the very understanding of education and of development (Husen and Postlethwaite 1994: 1648).

I have argued elsewhere that "education should be understood as part of, and not a panacea for, broader social change" (Fataar 1997b: 337). However, with the comeback human capital theory has made in underpinning the current closer fit between education and the economy in the context of globalisation in the late 1990s, the nature of the relationship between education and development has again become the focus of much speculation.

Education and Development historiography focuses on a number of areas that cut across the development terrain. I provide a list below of these areas and give a short overview of each.

Education and economic growth: The most common understanding of education and development is in terms of economic growth (Husen and Postlethwaite 1994: 1648). The underlying assumption of this link is provided by human capital theory whereby the creation of a skilled, motivated and disciplined workforce is seen to be the main focus of education. Economic growth is projected as dependent on the ability of education to create requisitely skilled labour. As with the link between social change and development, the link between education and economic development is not straightforward.

Education and social development: This area presents a broader perspective on education and development than do economic considerations. Social development refers to issues relating to and determining quality of life and meeting basic needs. Debates about the relationship between education and modernisation are central to this area. Modernisation refers to the socio-psychological processes through which people adopt modern attitudes in order to fit into a changing society. Education is seen as a key instrument in facilitating the adoption of such attitudes. The role of education in the modernising process is complex. Some have argued that education might not play such a powerful role in modernising people and that factors other than the school have greater influence (Husen and Postlethwaite 1994: 1651).

Education and political development: This area concentrates on the link between education and the political integration and participation of people in a nation's civic life. Education is seen as a means through which political socialisation takes place. Central here is the role of education in nation-building, in the development of a national consciousness, and in subsuming regional and local identities under a national identity. Thus, citizenship is a key concern of education's link to political development. But, while education is central to nation-building, it can also bring about division and conflict in society (see Fagerlind and Saha 1989: 131-141). Unequal educational provision can lead to greater disparities instead of building loyalty for the nation. The choice of a political system has a direct effect on a nation's curriculum choices. Politics and ideology determine, for example, whether the curriculum will be vocationally or academically oriented. An analysis of education policy in contemporary South Africa has to factor in the relationship between the type of political system put in place and the role education is envisaged to play in areas such as nation-building and political socialization[7].

2.3.2 The essential historiographical outlines of Education and Development

This chapter now turns to a discussion of the shifting theoretical trajectory of Education and Development as an evolving academic discipline over the last five decades. The aim of this section is to highlight the interplay between the historical and development context in the LDCs, and the concomitant theorisation about education.

Historiography emphasises the link between historical context and theorising in that it argues that theory can neither be understood ahistorically, nor can history be understood without theory (see Carr 1962). The shifting theoretical trajectory of Education and Development vindicates this position. I will start with an elaboration of human capital theory and modernisation theory and their impact on education and development. These two paradigms were dominant throughout the 1950s and 1960s. Next, I will focus on neo-Marxist critique of these paradigms durng the 1970s until the mid-1980s. Included here is a discussion of dependency theory and 'sociological theories of education'. Thereafter, I shift the focus to world-systems level theory which I argue provides conceptual space to advance an appropriate conceptual framework to consider education and development in the late 1990s. This will open the way for a consideration in a later section of this chapter of the impact globalisation as a 'diffuse social movement' has on education and development and hence education reform policy in the south.

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[7]. The literature (see Fagerlind and Saha 1989; Husen and Postlethwaite 1994; Graham-Brown 1991; Watson 1984) lists the following issues as a central part of the focus of education and development: literacy, adult education, non-formal education, vocational and academic education, universal primary education, gender equity, efficiency, language of instruction and educational planning.

2.3.2.1 Education and development in the age of innocence

Education as a development priority in LDCs was placed firmly on the international agenda in 1948 through the United Nations sponsored Universal Declaration of Human Rights which elevated education as a basic human right. Rights-based development discourses were extended to the south after the second world war in the context of decolonisation. The extent to which the colonial legacy continues to affect contemporary development in the south is subject to dispute. But that such development is being affected by a neo-colonial relationship between the north and the south is beyond doubt. Neo-colonialism refers to the "persistence of foreign control despite seemingly national independence" (Altbach 1971: 233). Altbach defined the influence of neocolonialism on education as "the continued post colonial impact of the advanced industrial countries on the educational system and policies as well as on the intellectual life of the developing areas" (1971:237). Mende extends this by explaining that "the continuation of the educational system erected by the colonial regime is by far the most powerful instrument for perpetuating the concepts, outlook, and the value on which the privileged classes' power is built" (1973: 99).

Neo-colonialism forms part of the backdrop against which education and development should be understood. However, education, especially its failure in the south, cannot be simplistically read as having been victim to the machinations of the north. Local elites, ideological and political preferences and bad development planning in the LDCs also played a major role in determining the outcome of educational development. The shifting nature of education and development in the south over the last five decades should be understood as the outcome of a complex mix of processes that are linked to specific circumstances.

The post second world war period, characterised by rapid decolonization in the south, saw the elevation of education as an important priority for national development. The decades of the 1950s and 1960s were characterised by great optimism and excitement with regard to broader development projects in LDCs as well as with the role of education in such projects. Thus, during these first two 'development decades' the relationship between education and development was presented in a very positive light. Education was conceptualised as a panacea for the many socioeconomic and developmental shortcomings in LDCs (Watson 1988:138).

In economic terms, investment in education was justified on the basis that it would be an inspirer of economic growth and a significant and crucial factor in the development process (Watson 1988: 139). The dominant view was that education would quicken the pace of development and play a crucial role in increasing countries' productive capacity by producing the requisite flexible human resources for a changing economic and technological environment (Fagerlind and Saha 1989:67-95).

In social terms, education was championed as a mechanism through which people in LDCs would be persuaded to decrease their high population growth, which was argued to be an obstacle to progress. Similarly, education would contribute to modernising the attitudes and values of traditional people to aid and abet the development process. Education would also encourage the pursuit of greater equality of opportunity and income as well as effect a fairer distribution of power among a country's people. Thus, education was seen as key to procuring greater social equality within and between countries.

Furthermore, education would play a powerful part in the acquisition of values and attitudes for nation-building processes under way in the recently independent post colonial world (see Watson 1988, Fagerlind and Saha 1989 and Thompson 1981).

Education was seen as a weapon of acculturation (Watson 1988: 239) in terms of which the modernisation of traditional people[8] would be facilitated. It was also expected that education would produce indigenous personnel such as teachers, administrators, clerks and civil servants to replace expatriates employed in the public service. The literature leaves no doubt that the link between education and development during the 1950s and 1960s was understood in a very positive manner. Ward (1974) and later Weiler (1978: 179-180) questioned this conceptualisation. With the advantage of hindsight, they described the first two development decades as 'the age of innocence'. Both these theorists proffered a much more complex account of the relationship between education and development.

Nevertheless, the age of innocence witnessed a phenomenal surge in educational development in countries of the south. During the 1950s and 1960s grandiose educational projects were undertaken specifically in the areas of Universal Primary Education (UPE), literacy and in the proliferation of what Watson terms national development planning (1988: 139). The 1960s saw the rapid expansion of secondary and university education, the latter with the rationale that it would provide future bureaucratic and political leaders, as well as research that would lead to social and economic development[9]. Pressure for educational expansion was enormous, arising from internal political dynamics, demands for social justice and rising expectations. Without there being time to consider the appropriate role or form of education "countries simply expanded the existing educational patterns left by the former colonial rulers" (Watson

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[8]. Fuller argues elegantly in his book entitled *Growing-Up Modern: The Western State Builds Third World Schools* (1991) that education and more particularly schooling promoted westernization under the guise of modernisation. This, he believes, has had a disastrous impact on the developing world. It contributed to alienating people from their traditional culture and prepared children for an economic and technological environment which did not exist in their countries. This partly explains the ubiquitous mismatch between education and the world of work in LDCs. Craig (1981) extends Fuller's view with his description of how modern (western) education contributes to the acquisition of "literacy, numeracy, knowledge of a western language, and the associated credentials that could bring jobs in the emerging modern sector of the economy, greater security, and higher status in the eyes of westerners and, increasingly, one's peers" (Craig 1981:193). And, as dependency theorists insist, while economic returns accrue to individuals and elites, they are not necessarily forthcoming to countries as a whole.

[9]. Watson (1988: 144) comments that university based research in LDCs should emphasise not so much the production of new knowledge as the application of existing knowledge to local problems.

1988: 139). This led to the enduring popularity of an academically based curriculum.

The expansion of primary schooling during this period was remarkable. Craig (1981: 181) drawing on UNESCO statistical information, shows that while the provision of school places to children between 1950 and 1970 more than tripled worldwide, 88,5 percent of school enrolment increases took place in the developing countries. Watson (1988: 142) concurs and points out that the growth in UPE from the 1950s until 1980 represents a doubling of all previous enrolment worldwide before this period. While this global picture of the growth of UPE disguises regional variations (between, for example, South East Asia where growth has been spectacular and Africa) as well as the patterns within countries (urban centres might have experienced greater growth than peri-urban and rural areas), the remarkable expansion in UPE in LDCs is indicative of the positive mood that existed at that time about the link between education and development.

The justification for the UPE and literacy campaigns was that it would bring about economic growth, greater social equality and an end to regional disparities. The argument was made that UPE would lead to national identity, improved health care and a decrease in fertility rates[10]. In other words, UPE projects constituted the centre-piece of educational development in LDCs and became an important yardstick to measure a country's development. However, many other educational areas were also pursued including; secondary and higher education, gender equity, literacy and adult education.

The functional paradigm, incorporating human capital theory (HCT) and modernisation theory, provided the justificatory framework for Education and Development during the 1950s and 1960s. Functionalism furnished an almost unchallenged conceptual framework. Its fundamental assumptions were questioned in the late 1960s and early 1970s. However, the extent to which its theoretical positions have been sidelined is subject to dispute. Chisholm (1997: 53) argues that the 1990s have seen the re-emergence of HCT in dominating educational projects internationally. However, a note of caution is necessary. HCT as a theoretical paradigm has become discredited since the late 1960s, but it has continued to inform development projects the world over. Thus, there is a sharp disjuncture between HCT in theoretical and intellectual circles in education, and its powerful influence in educational development practice (Patrinos and Burnett 1996). It is important to note that HCT remains highly influential within the academic discipline of economics. This led to speculation that education in contemporary times is informed more by an economic than an educational rationale. In this regard Patrinos and Burnett (1996), two leading World Bank educationists writing in defence of the Bank's 1995 Education Review, make the following startling observation about HCT:

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[10]. See Fagerlind and Saha (1989), Watson (1988), Watson, (1984), Craig (1981), Colclough (1993), and Fuller (1991) for further elaboration of the role and purpose of UPE in development.

> In accepting the human capital perspective we have relied upon the latest research as published in top economic journals. In the critics' comments there is general unease about the usefulness of human capital theory, or what has become the mainstream view in economics ... Human capital theory ... is no longer considered controversial (Patrinos and Burnett 1996: 273).

Based on the above statement, with the World Bank's prominent role in education policy development, it is no wonder that HCT is so influential in education policy and practice in the south.

The functionalist school dominated the social sciences, including sociology of education, during the 1950s and 1960s. Functionalists argued that "society is like a human body, unified and stable and with different parts, or social institutions, which work together to keep society functioning" (de Clerq undated: 7). Social institutions such as the church, welfare, family and education play a specific role and are integrated into a whole that is in a permanent state of equilibrium and harmony. Functionalism thus views the functioning of society consensually, i.e. all institutions are naturally predisposed to contributing its share in making society function smoothly.

At the centre of functionalism is its analysis of modern society and the important role of education therein. Three features of a modern society make it different from traditional societies (Hurn 1985:47). First, occupational roles are achieved on the basis of merit rather than ascription or inheritance of social status. Second, modern society is seen as an expert society which depends on rational knowledge for economic growth. Education has two crucial functions in the expert society in that it 1) provides, through the universities, important research that produces new knowledge to guide growth and social progress, and 2) equips individuals with skills and cognitive knowledge to function productively in the modern economic sector. Third, democracy is of fundamental importance in the functioning of a modern society. Democracy is a central principle in achieving humane goals such as social justice, pluralism and civil liberties (Hurn 1985: 50). Education is viewed as the principal means through which a society acquires and sustains its modern status and is thus crucial in the overall development of society.

The economic growth model was at the heart of development thinking in the first few development decades. Economic scholarship was dominated by Rostow's linear development model. According to Fagerlind and Saha, the basis of Rostow's theory is founded on his depiction of

> ... linear stages of economic growth through which all societies must pass in order to reach full maturity: the stage for preconditions for economic take off, the take off, the drive to maturity and the stage of high mass consumption. The take off represents the tipping point or the 'watershed' whereby the resistances and obstacles to growth are overcome, and growth itself then becomes the normal condition of a society (Fagerlind and Saha1989:68).

For the 'take off' to occur, traditional societies require changes in political, social and economic structures. These changes are either brought about through outside interventions or innovations from

within traditional societies. For Rostow[11] the "acquisition of values which predispose a population to the possibility and desirability of change itself" (Fagerlind and Saha 1989: 69) is a key prerequisite for a society to reach the take off stage. Education is deemed to play a central role in the acquisition of modern values. I will elaborate on this dimension below when I present an overview of modernisation theory.

Watson (1988: 140-141) notes that a similar linear development model as Rostow's was developed by human capital theorists in the area of education. According to Watson these theorists argued that "education likewise had to pass through certain stages of development before the highest level of maturity and development could be achieved" (1988: 141). This view was to have a profound effect on education in LDCs as it allowed development agencies in 'developed' countries of the north (apparently with fully developed and mature education systems) to dictate the terms of development of lesser developed countries on the basis that they have attained educationally what LDCs are still to attain.

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[11]. Despite its simplicity Rostow's theory remained remarkably durable over the decades. He stood firm on the basic tenets of his theory by providing in 1971 and 1978 strong empirical support based on research done in many developing countries. But, as Fagerlind and Saha (1989: 68-71) convincingly argue, his theory represents only one kind of development based on a narrow western model. Frank (1969) criticises his work for its questionable historical accuracy, its teleology and its failure to describe the very dynamics inherent in the change processes which Rostow deems to be of such importance.

During the 1950s HCT provided analytical tools for the study of education's contribution or link to economic growth. Deriving from neo-classical economics (the functionalist framework in the area of economics), HCT furnished the dominant pattern for education analysis as well as serving as the dominant guide for education policy, practice and research. HCT provided governments with a rationale to invest in education and tools to measure their investment (Easton and Klees 1990: 417).

Education is seen by HCT as an investment whereby increasing knowledge and expertise would pay off in terms of an individual's enhanced economic contribution to society's productive capacity and output. The individual's educational efforts which improve his or her economic productivity are rewarded in the form of higher current and future increased earnings. HCT thus favours education as a sound investment on the basis of its payback potential. Educated employees are more productive and adaptive than lesser educated people. For HCT what is true for the individual is true for society. A society's investment in increasing the stock of human capital is regarded as rational in that it increases overall productivity and hence economic growth.

Inspired by HCT, educational planners in the LDCs, with the aid of development and aid agency planners, based their planning on the estimated personpower needs of the emerging modern sector (Bacchus 1981: 216). Education would thus provide the required skilled labour to make the modern economic sector, which was thought of as the engine of development and growth, functional. I later focus on the prominent role of HCT in influencing education policy in the context of globalisation.

While HCT focuses on the economic dimensions of education, modernisation theory concentrates on the sociological dimension of education. Modernisation theorists maintained that education plays a fundamental role in societal modernisation. Modernisation, in the words of Apter "is best conceptualised in terms of the growth in moral, social and personal choices ... the liberation of a human population from the environmental, political and cultural constraints which place obstacles to its freedom to choose its destiny" (1965: 30). Black preferred to define modernisation as a "form of human adaptation and the increasing use of man's rationality and knowledge in mastering his environment" (1966:75). Modernisation thus constitutes the process of becoming modern which involves a form of human adaptation through the use of rationality and knowledge. Becoming more rational is regarded as integral to modernisation in that it is central to the secularisation of traditional societies. Mysticism and fatalism associated with traditional religion are marginalised because of its negative impact on becoming modern.

Theorists such as Inkeles and Smith argued that modernisation is "essentially a social-psychological process through which a country becomes modern only after its population has adopted modern attitudes, values and beliefs" (1974: 20). The following are some of the traits that have to inhere in an individual in order to be classified as modern: openness to new experience, readiness for social change, orientations to long-term planning, understanding the logic underlying production and industry, trust in the calculability of the surrounding world and placing value on formal education (1974: 19-25).

Modernisation theory champions formal education, which encompasses a conscious process of imparting 'rational knowledge', as the leading agency to facilitate modernisation. Other modernising social forces include urban residence, exposure to the mass media and industrial employment (Inkeles 1974: 10). Inkeles provided an elaborate statistically backed argument to illustrate the positive link between education and modernity, even where other modernising forces had a relatively minimal impact on shaping individual modernity (1974: 7-23).

Education was supposed to bring about the social, cultural and psychological changes that would enable traditional society to transform into a modern one. According to modernisation theory education has a socially integrative and modernising function in the development process. Education was meant to provide the necessary skills, competences and attitudes for the people of traditional society to move into the modern world.

2.3.2.2 Education and Development in the age of scepticism

The positive development consensus came to an end by the early 1970s. The main precipitating factor was the adverse international economic climate in the capitalist West. The rate of capital accumulation in the West, particularly in the old industrial countries such as the United States of America and Britain, was experiencing a downturn. Their productive inflexibility and technological lag prevented them from adapting to a rapidly changing economic environment. They experienced high inflation, plummeting growth rates, rising debt and debt rescheduling, and industrial recession (O'Cadiz et al. 1998: 17). Fordism, the dominant mode of economic regulation in the postwar years, sustained economic growth in the old industrialising countries until the early 1970s. This period became known as the 'golden age of global fordism' in that it represented a period of unprecedented economic growth for industrial countries. Fordism was based on the mass production of standardised goods by monopoly corporations (Kraak 1992: 40-42). However, by the 1970s fordism was displaced by a new, technologically driven, mode of production regulation known as 'post fordism'. Harvey comments that "limitations on the growth associated with the postwar fordist era began to be evident from the early 1970s, but it was the oil crisis of 1973 that abruptly exposed global fordism's inability to contain its internal contradictions" (1989: 191)[12]. In 1973 the oil-producing mainly Middle Eastern countries banded together to raise the price of oil by almost 400 percent (Soros 1998: 108), resulting in large surpluses for these countries. But, the oil-importing countries suffered huge financial losses. As a result many former leading countries in the industrial world suffered economic recession, which in turn negatively affected their predisposition towards development in LDCs.

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[12]. For elaboration on the shift from fordism to post fordism see Harvey (1989), Mathews (1989). I will discuss later-on in this chapter.

Attitudes over development in the LDCs were also fundamentally shaped by the problems experienced by the large scale development projects embarked on in the 1950s and 1960s. The results shown by these projects were less than satisfactory. For example, the success of UPE, the period's flagship educational project, was questioned. Weiler (1978:180) points out that while educational access had expanded rapidly, very little educational change occurred in the redistribution of power and privilege in developing countries. The reasons proffered for this failure included: resistance of educational systems to change, difficulty in getting support for educational reforms and the tendency of educational programmes to be extensions of the status quo. But, at the centre of the debate is the acknowledgement that the initial conceptualisation of the relationship between education and development was too simplistic. Whereas it was initially thought that educational development would lead to social and economic development, it has now become accepted that "development, and especially economic development, is the independent variable in the relationship (rather than education)" (Weiler 1978: 181). In other words, genuine educational change is dependent on the direction of broader societal development[13] and not the other way around. While this critique was founded on a deterministic and unilinear view of development, it highlighted the limited capacity of education in overall development. Yulat (1988) summarised the end of the period of innocence in development thinking aptly when he said that:

> It is now almost axiomatic that any comprehensive discussion, from a global perspective, of education and its role in national development must commence by going back to the period at the end of the sixties when the bubble of exaggerated optimism regarding this role eventually burst under the weight of contradictory facts (325).

Many other problems were raised about the nature of education and development. Despite the spectacular expansion of UPE, there were concerns about rural-urban migration, irregular school attendance, wastage, poor retention rates and poor quality (Watson 1988: 150). Other problems were in the areas of gender inequity, poor quality teaching, and equity and social change. The 1970s saw a number of indicting critiques of education and development, especially from neo-Marxist writers. They raised issues of equity and justice with greater emphasis on marginal social groups such as the rural and urban poor, women and minority groups.

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[13]. I advance in the section on equality and development in this chapter a more dialectical view of the relationship between economic development and educational development.

Criticism of functional theory showed it to be "in a sorry state ... with a rigid and ambiguous conceptual framework" (Easton and Klees 1990: 420). I will summarise some of the main criticisms that were levelled against the functional paradigm. Firstly, functionalism tends to treat education as if it operates in a politically and ideologically neutral environment, which, if it is made available in due measure would lead to greater social equality. It fails to account for the ways in which education, when made available in society, could reproduce the pre-existing social inequalities of that society. Thus, instead of promoting change and social improvement, education could assist in entrenching and deepening poverty, stratification and a lack of development.

The second weakness of functionalism relates to the way in which education is viewed in a vacuum as having a simple and straightforward impact on society. Education is regarded as having the capacity to almost singlehandedly improve the functioning of society and the individuals in it. It fails to take cognisance of the fact that other factors such as the environment, socioeconomic background, culture and politics play an equally important role in determining a society's or an individual's performance and skills. Contrary to functional theory, the relationship between education and individual modernity is difficult to measure because of being mediated against the context of an interplay with the factors mentioned above. While there is a correlation between education and modernity, the relationship is complicated by the contextual factors that surround it.

A third criticism levelled against functionalism, especially HCT, relates to the way its economic model influences education (Bacchus 1981: 215-217). Economic development was believed to occur only through the development of the LDCs' modern industrial sector of the economy along capitalist lines. It was held that this sector's 'take-off' would trigger the development of the rest of society. Crucial in this process was the active role developed capitalist countries were supposed to play through aid, foreign investment and technical assistance. The LDCs education systems were expected to produce the required human resources to service the modern sector of the economy (Bachus 1981: 216). The occupational structures of the developed economies thus became the model of how the education system in LDCs was supposed to produce personpower. However, a huge gap began to emerge between this type of education system and the inability of a large enough modern sector to emerge in LDCs. The small modern sector could not absorb the personpower that was produced. Educational systems based on the model of developed countries thus contributed to an abiding mismatch between education and the economy. The large number of educated unemployed in LDCs is a reflection of this mismatch. Two other indications of this mismatch are the urban-centeredness of educated people and the overproduction of 'unproductive' intellectuals (see Fagerlind and Saha 1989).

2.3.2.3 Neo-Marxist theorisation on Education and Development

New theoretical frameworks, generally following the conflict perspective of neo-Marxism, supplanted the functional paradigm. Two broad theoretical approaches can be discerned namely the dependency approach and an approach that has converged under the heading 'sociological theories of education'[14]. They derived an alternative theorisation to study education and development. They offered a more sophisticated and reliable analysis of education's role in development and social change.

2.3.2.3.1 Dependency theory

Originating in South America, dependency theory rebutted the perception that the failure of LDCs to develop was a result of the backwardness of these societies. It argued that the lack of development was primarily caused by intervention from external capitalist countries. The very forces which modernisation theorists thought to be key agencies for development were seen by the dependency theorists as the cause of the underdevelopment and dependency in LDCs (Frank 1967:15).

Dependency theory's main contribution in Education and Development historiography has been to locate development in political and economic context, and question in whose interest development occurs. Development in the LDCs was not assumed as an inherent good, but was seen as serving specific political agendas, which were those of the developed world[15]. The metropole's intervention in assisting peripheral countries was regarded as more in the interest of the metropole than the periphery. To put it differently, 'development' in the periphery served more the development of the metropole than the periphery. Dependency theorists thus maintained that what is regarded as development actually caused the LDCs to underdevelop, and depend on the developed world for their survival (Frank 1967: 16). This accounted for the peripheral countries' uneven development profile and the continuation of social inequalities.

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[14]. While dependency theory is also a sociological theory, the literature discusses it separately from other sociological theories of education.

Educational dependency theorists viewed education and its relationship to development as politically non-neutral. They were concerned with the kind of education that promotes liberation from dependence on the metropole. The focus thus shifted from the technical relationship between education and development, to questions about the role education played in creating greater dependency and underdevelopment. Concepts such as educational colonialism, cultural imperialism and legitimation were influential in analysing the role of education in generating greater exploitation and subjugation. Dependency theorists discussed how and under what conditions education policies and practices contributed to dependency. This theoretical paradigm proved useful in highlighting the political and ideological biases inherent in education's link to development.

The main criticism levelled against the dependency paradigm was that it provided a mechanistic and linear explanation of development. Critics regarded dependency theory as simplistic because of lumping together different interest groups and classes in the metropole and the periphery as if they were in pursuit of a single-minded agenda. This position ignored the conflicts and contradictions inherent in the metropole and the periphery. MacLean describes it thus:

> Dependency theory suffers from several of the same weaknesses as the modernisation model. It has been seen to have universal applicability and cannot easily accommodate variations. It assumes that there is only one inevitable path to underdevelopment in the same way as modernisers assumed one inevitable trajectory of development (in De Clerq, undated: 6).

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[15]. Dependency theorists refer to developed former colonial countries as metropoles or the centre and countries in the developing world as peripheral countries.

Educational dependency theorists were also criticised for providing a simplistic view of educational hegemony in that they assumed that educational transfer from the metropole was achieved easily in the periphery. They ignored the struggles and conflicts which local people engage in when rejecting educational transfer. Unlike technological or capital transfer, educational transfer involves active human agents who can recognise oppressive educational practices and resist it. Thus, educational hegemony and legitimacy are never totally achieved.

Despite theoretical shortcomings, dependency theory managed to shift the focus of educational development towards social equality. International development agencies began to formulate education policies that would compensate for educational inequalities in the LDCs. This shift was reflected in the Education Sector Policy Paper of the World Bank (1980) which, among others, called for a recommitment to basic education for all. This shift, however, did not represent a sea-change in the assumptions underlying educational development. While some of the criticisms made by dependency theorists were incorporated, educational development maintained its essential ideological and political thrust (De Clerq, undated: 4).

2.3.2.3.2 Sociological theories of education

By the mid 1970s the functional paradigm, based on a consensus or equilibrium perspective of society, was displaced by the conflict paradigm as the main theoretical framework that governed sociological analyses. Conflict theory does not view society as monolithic, unified or stable. Unlike functionalism which considers social institutions to be in harmony, conflict theory argues that these institutions are often "in disharmony with one another and internally ridden with conflict" (Hurn 1985: 61). Societies are characterised by conflict because of the different and conflicting interests held by their different social groups and classes. The central dynamic or motor of society is its perpetual disequilibrium or disharmony. Society is understood "to move and develop through this ongoing process of conflict and struggle that exist between these social groups, whether they are defined by class, race or any other social criteria" (De Clerq, undated:7).

Sociologists of education who subscribed to conflict theory viewed education to be part of the unequal and conflict-ridden society. They thus analysed the precise role and function of education in contributing to the social cleavages in society. They showed how education contributed to the reproductive framework in terms of which it (education) upheld and reinforced socioeconomic inequalities. Althusser[16] (1971) theorised about the ideological role of education in reproducing social inequality. Bowles and Gintis (1976) demonstrated education's role in creating class inequality in a capitalist society. Education reproduces the necessary social relations for the perpetuation of capitalism, especially the social relations of production. They argued that there is a close fit (a correspondence) between the social relations of education and those of production. From this they concluded, based on substantial empirical evidence of American education, that the main purpose of education is to position people into the social hierarchy of production. In this manner inequality is perpetuated (see Bowles and Gintis 1976).

Reproduction theory's main contribution is that it showed the 'hidden' link between education and production and the role education plays in reproducing the pre-existing order. However, reproduction theory came under severe criticism for still providing an essentially functionalist view of education. Critics pointed out that reproductionists criticised education in a capitalist society for being functional to a class-ridden society (Lauglo 1985: 28 and Hurn 1985) in terms of which education legitimizes and reproduces inequality in society. Thus, similar to functional theory, reproduction theory understood the relationship between education and society in functional terms, i.e. that education functions to reproduce the unequal socioeconomic and political order, which ought to be resisted. Instead, education has to be 'functional' to establishing social equality. The difference between functionalist and reproductionist theory is that for the former education is a neutral and ideology-free institution which contributes to the smooth functioning of a unified society, while for the latter education is politically and ideologically aligned to the reproduction of an unequal society.

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[16]. Althusser was one of the first modern scholars to theorise about the ideological role of education in a class-based society. His work was seminal in the emergence of the repoductionist theories of education of which Bowles and Gintis's *Schooling in Capitalist America* (1976) is a high watermark.

Lauglo (1985) highlights another theoretical similarity. Both theories rejected the view that education in its own right is or could be a source for social change. Both posited education as mainly responding to the needs of the economic and political system. The reproductionists hold that education plays a key role in reproducing inequality, while the functionalists argue that education plays a maintenance and integration role. Lauglo contends that both these views suffer from

> ... unwarranted categoric generalisation. Surely, insofar as schooling makes people more productive it is a source of 'social change' unless 'real change' is defined in very restricted terms. It can also be a factor in its own right in gradual and revolutionary political change (Lauglo1985: 26).

During the 1980s, educational sociologists, while following a conflict approach, reconsidered the reproductionist approach. They derived a more dialectical approach to the analysis of education which centred on the concept of contradiction. They contend that a robust educational theory must take into account the manner in which education is resisted or changed or of instances where it completely collapses. Their perspective throws light on the tensions and conflicts in the education system which often take place among teachers, bureaucrats, students and policy planners. They argue that only a more sophisticated understanding of social and educational processes would reveal the nature of the terrain more accurately. These scholars argue that education should be regarded as both a terrain for cultural and economic reproduction and as a place of conflict and contradiction where different social groups contest the meaning and outcome of education (see De Clerq, undated and Hurn 1985).

Thus, education continues to reproduce the social order amidst constant challenges and resistance. The main point of resistance theory is that education policy formulated by those in power is never unproblematically translated into practice. The outcome of policy depends on the balance of social and class forces existing at any particular time in society and the extent to which these forces interact with or resist policy. It is with this dialectical approach in mind that I now turn to world systems theory (drawn mainly from the work of Ginsberg et al. 1990) which I argue provides a tenable basis to develop a conceptual framework to guide my analysis of education policy in South Africa between 1994 and mid-1997 within global perspective.

2.3.3 Ginsberg et al. and world systems theory

In an article entitled 'National and World System Explanations of Educational Reform' Ginsberg et al. (1990) make a major theoretical advance in providing an analytical connection between a nation's educational reform policies and the broader world context. Given the pervasive influence of what is termed 'globalisation' on public policy in contemporary times, this connection would enable analysts to derive a sharper understanding of such policy. The underlying assumption is that global influences indeed have a fundamental impact on a nation's policies which cannot be ignored. Ginsberg et al. provide a plausible theoretical framework to analyse national educational policy within international context. I believe their work opens up space for theorising about the effect of globalisation on education policy in South Africa.

Ginsberg et al.'s article has three main aims namely: 1) to understand educational reform, 2) to provide an investigation of the practices, purposes and consequences of educational reform and 3) to develop a clearer conceptualisation of the meaning of educational reform with specific emphasis on timing and focus. Their views are based on a critical review of the consensus and conflict theoretical approaches. The article devotes special attention to the state and its relation to the economy. Their main theses consist of: 1) recognition of the contribution of consensus and conflict theory, 2) avoidance of a deterministic explanation of educational reform and 3) development of a conception of education as 'relatively autonomous' within economic, cultural and political context. Their views turn on the contradictory dual roles any state is expected to fulfil namely that of reproduction and accumulation. They argue that this contradiction creates space for the state's relative autonomy.

Ginsberg et al. favour the world system-level conflict approach[17] to analyse educational reform. Providing essentially an economic focus, this approach emphasises the centrality of the world economic system as capitalist. It does not ignore the cultural or political sphere but these are viewed in relation to the economy. The world is divided into 'core', 'semi-peripheral' and 'peripheral' countries. Central to the world economy is a complex set of capital-labour relations. The core is typified by a relatively free wage labour system while labour in the periphery is subjected to varying forms of coercion. Coerced labour enables multinational companies to appropriate surplus value from the periphery to the core. According to the world system approach, this transfer is the primary reason for the unequal relations between core countries and the periphery. The transfer of surplus value is facilitated and sustained by cross national class alliances and repression in the LDCs (Ginsberg et al. 1990: 484-485). Carnoy and Levine captured the transfer process succinctly with their assertion that class struggle and conflict in the Third World or peripheral areas are "not simply between dominant and subordinate classes in a given country, but between subordinate classes on the one hand and an alliance of local dominant groups with a transnational technocracy from the First World on the other hand" (1986:36).

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[17]. The world system-level approach, initiated by Wallestein during the 1970s, elicited great debate and critique (see Wallestein 1991).

Ginsberg et al. do not regard the position of nation-states and regions in the world system as fixed. On the contrary, they argue that "world-system dynamics occur through social struggles taking place on a terrain characterised by a set of fundamental contradictions" (1990: 485). They highlight the two fundamental contradictions as: 1) the economy-polity contradiction and 2) the accumulation-reproduction contradiction. The economy-polity contradiction lays in the fact that "the economy is primarily a world structure, but political activity takes place primarily within and through state structures" (1990: 486) at the country-level. At the economic level a double level of competition exists which involves competition between states and regions and among different capitalist institutions for capital accumulation and profit making. Moreover, social struggles in the world system involve conflict and cooperation between nations, between capital and labour, and between other social groups (1990: 486). The reproduction - accumulation contradiction refers to the struggle by nations in the context of legitimating both nation-states and the capitalist relations of production (i.e. reproduction) as well as promoting capital accumulation at the local, national and global levels (i.e. accumulation)[18] (1990: 486).

Ginsberg et al. highlight the role played in world system processes by multinational organisations, corporate foundations, aid agencies, international organisations and universities. These organisations play a vital role in determining the focus, substance and timing of educational reform. While these organisations do not serve the same interests all the time, the leverage they are able to gain from establishing unequal relations with LDCs enables them to have a major influence in determining development and educational reform policy. Thus, these organisations play an inordinate role "on the terrain of contradictions of the world capitalist system" (1990: 488) and must therefore form a fundamental part of an analysis of any country's education policy framework.

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[18]. I will elaborate on the accumulation - reproduction contradiction in the next section on the state and education.

For Ginsberg et al. educational reform should not be conceived in functional terms as simply responding to the needs of the world economic environment. Rather, they favour a more complex and dialectical analytical framework. The contradictions in the world capitalist system as well as those that operate in the state ensure that "the dynamics of the global economy do not determine in some simple direct correspondence how education and the state in any society are structured or restructured" (Ginsberg et al. 1990: 489). They prefer an analysis of education that concentrates on the interaction between national (and regional / local) cultural, economic and political factors on the one hand and dynamics of the world system on the other hand. Simmons agrees with this view when he says that "educational reform ... is shaped by a complex interaction among local, national and international factors" (1986: 10). Wirth and Harman elaborate on this by stating that "national qualities operate like a prism, refracting and adapting [global] influences without blocking all of them" (1986: 4). Ginsberg et al. argue that the point of including in their analysis the world-system and national structural and ideological contexts of educational systems is "to emphasise that the world system constitutes an important part of the terrain on which groups struggle over educational organization, goals, curriculum, pedagogy, financing, and so on" (1990: 495). The form and substance of educational reform will differ from country to country depending on the specific form of interaction between national and global dynamics and the struggles waged over educational reform. I attempt in this thesis to provide a study of education reform policy based precisely on this interaction.

2.4 The role of the state in education

It stands to reason that educational development and reform discourse must take into consideration the nature and role of the state in determining education policy and practice. The state does not make policy on its own devoid of different forms of public pressure and contradictory demands placed on it by diverse social groups and classes. It is thus crucial to advance a robust conception of the state which is capable of clarifying the multiple forces and dynamics that constitute the state at any time. Any analysis of education policy and practice, I contend, depends on clarifying the manner in which the state is constructed in time and space. Below follows a conceptualisation of the state which would enable a richer analysis of education policy[19].

Earlier instrumentalist conflict theorists saw the state as primarily acting as an agent of capital. The state was regarded by them as functional to the structure of the economy and the dominant class relations, and as the reproducer of the conditions necessary for continued class domination. As an arm of capital the state was viewed as a coercive and administrative apparatus. The state was thought to be constituted in a monolithic and undifferentiated manner devoid of contradictions and conflict (Apple 1989: 11).

Later theories on the state viewed the above approach as inadequate in explaining the nuances and contradictions that characterise public policy. Instead of viewing the state as a passive institution, they advanced a position which saw it as an active instrument in constructing the public domain. Apple (1989: 12) contends that while the state is administrative and coercive, it is also educative and formative and is in a position where it could exercise moral leadership. Dale (1982: 133) posits that the state continually seeks to justify a new or changing hegemonic bloc within any social formation by gaining 'active consent' over those whom it rules. The hegemonic bloc is constituted by "multiple sources of determination in each conjuncture" (Apple 1989: 12). The state is an arena of conflict where different groups with different interests struggle over the meaning and content of state policy. Thus, as a result of the many levels of interaction and contestation to which the state is subjected, policy always originates from and leads to contradictory outcomes.

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[19]. In a democratic political context the distinction between 'state' and 'government' is of importance. The government is the executive arm of the state. It gives expression to certain political choices in government legislation and policy. The state refers more broadly to the ensemble of institutions which make it up such as the constitutional, judicial and law enforcement agencies. These institutions have separated powers with (relative) autonomy from the ruling government. Only in a totalitarian or oligarchical arrangement such as South Africa under apartheid could one speak of 'state' as including all the institutions that make it up.

Furthermore, Urry observes that

> ... the state is never simply omnipotent, nor does it simply react to the demands and needs of the economy .... rather the state is itself to be seen as actively seeking to establish and sustain a particular constellation of social forces (1981: 102).

However, the state is not an amorphous entity that is open to influence by social actors and institutions other than the economy. Dale clarifies the way the capitalist state operates thus:

> The functions of the state in capitalist societies are given not by the direct control of capitalists or capitalist sympathizers within the state apparatuses, but are in fact objectively given by the imperatives of the maintenance and reproduction of the conditions of existence of the capitalist mode of production. That is, the state must ultimately reproduce a particular set of social relations, including relations of production, because the revenue that sustains its operation depends in part (via taxation) on the accumulation (of surplus value) process (1982: 135).

The state functions to guarantee a context for the continued expansion of capital accumulation and the legitimation of the capitalist mode of production. Thus, the central dynamic of the state's functioning is conditioned by having to mediate between its two mutually contradictory core functions, i.e. accumulation and reproduction[20]. Accumulation refers to the maintenance of conditions for capital to expand, which is normally the realm of economic policy. Reproduction refers to the organising and legitimating of social relations that would service accumulation. Reproduction involves spending of the surplus profit of the capital accumulation process to provide social infrastructure such as housing, health care, civic amenities, roads and healthy worker-employer relations. This type of spending cuts into the profitability of the accumulation process. The ever increasing level of public expenditure impedes capital accumulation, which in turn, places the state under pressure to limit its role in the reproduction realm. The contradiction between accumulation and reproduction lies in the fact that while the latter process demands more public money, the former always attempts to cut public expenditure.[21] While the state promotes the functioning of capital, the state also retards it by having to ensure reproduction. Dale summarises this point as follows:

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[20]. I will show further-on in the section on globalisation how in the current neo-liberal ideological environment the state is limiting its involvement in the reproduction realm. This has decisive implications for the nature of public policy.

> ... the central contradiction is ... that while the capitalist mode of production is driven by the creation and the realization of surplus value, the conditions for its success and reproduction can only be guaranteed *through the extraction of some part of that surplus value by the state* (1982: 135) (my emphasis).

The accumulation - reproduction contradiction creates the space for the state's relative autonomy to shape public policy within the broad world capitalist context. The education system, which is part of the state, is a crucial site where this contradiction plays out. Spaces to shape education policy are created by contradictions within the state as well between the state, education and the economy. According to Ginsberg et al. (1990: 491) it is within these processes that education policy is structured and restructured. Thus, what constitutes education is not simply the result of the state's imposition or the natural working of capitalism. An understanding of education policy requires that the multidimensional processes and dynamics which shape education must be analysed.

Apple asserts that the education system "developed ways of mediating, in deliberate and unintended ways, the aspirations, policies and pressure of all ordinary groups" (1989: 14). Because education is not simply reflective of the purposive actions of the state, the "educational state apparatuses (education administrators, teachers) have an independent effect on the pattern, process and practice of education, an effect not reducible to the demands of capital accumulation" (Apple 1989: 15). This implies that we should focus on the relationship between wider state policy and education policy and practice as it is manifested within the different levels of the state and the educational apparatuses.

Furthermore, Weiler (1988) raises an important issue with regard to the state's use of public policy and specifically education policy in attaining legitimacy. He argues that in times of economic crises the state suffers from a credibility crisis. He argues that state action must not just be understood in terms of the contradictory processes inherent in reproduction and accumulation, but that it should also be understood in terms of attempts to establish or maintain state legitimacy. Weiler states that:

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[21]. An example of the way the accumulation - reproduction contradiction has been mediated in favour of accumulation is South Africa's drastic taxation decrease on business corporations over the last ten years from 35 percent to 12 percent, and the concomitant increase in direct and indirect personal taxation (MacGrath and Hodden 1995: 43).

> As the modern state ... faces a chronic deficit of legitimacy, the recourse to the legitimating potential of symbolic action becomes an important strategy. ... The idea, it seems, is to maximise the political gain to be derived from the design of educational reform and to minimize the political cost of implementing them (1988: 265).

Thus, a central dimension in understanding education policy is to examine the political, ideological and symbolic dimensions that education policy is used for, as much as the educational practices it purports to engender. The use of policy as 'compensatory legitimation' (Weiler 1990) provides a useful frame to understand education policy in a neo-liberal context (I elaborate on this below) where the state becomes less committed to providing for the social welfare of its citizens, including in the area of education. I provide further theoretical elaboration that is allied to the 'policy as legitimation' position referred to above in Chapters Five and Six of this thesis which focus on school curriculum and school access policy respectively.

This section has advanced a conception of the state and its relation with education that identifies the multiple forces and dynamics that constitute the state's functioning. The state actively seeks to establish its hegemony in a society. The state is ridden with conflict between different interest groups. Interaction and contestation are key features which construct state policy and which are always characterised by contradictory outcomes. The reproduction - accumulation contradiction inherent in any capitalist formation provides the relative autonomy for the state to enact a particular vision through public policy. On the educational terrain, the above contradiction provides space within the state and between the state, economy and education to shape policy. Education policy is shaped within these processes. Also, important to take into consideration are the relatively independent responses by educational institutions and actors to policy. Understanding education policy and practice thus requires an analysis of the institutional reaction to state policy. Finally, in a context of diminishing resources at the state's disposal, education policy should be analysed from the point of view of the state's need to maintain its own legitimacy. It might turn out that education policy is more about winning consent at the ideological level than about initiating real change in practice.

2.5 Globalisation and education policy

As an academic discipline Education and Development has always laid stress on the international influences on education policy of nations in the south. I showed earlier in this chapter how educational development has in large measure been determined by the neo-colonial relations between the north and LDCs after the latters' independence. The trajectory of educational development in the south has been influenced as much by countries' internal dynamics as it has been shaped by transnational forces. I referred extensively to Ginsburg et al.'s work to show the interaction between international and national dynamics. Arguably, this interaction intensified during the 1990s subsequent to the end of the cold war, where after socialism became discredited as a viable political, ideological and economic alternative. Capitalism came to establish itself all over the world as the hegemonic economic mode. The new economic mode, propelled by ever-changing technology and the information industry, has fundamentally impacted on the economies of all countries. This has had a corrosive impact on countries' national identities where the idea of the political and economic autonomy of the nation-state has come under fire, as well as nations' ability to serve their development needs. In this section I develop a conceptual framework to account for the manner in which global processes operate to constitute a major part of a nation's policy environment with specific reference to public education.

By using Ginsberg et al.'s view of the importance of the world system context of educational reform, I will advance the view that global processes accentuate the reproduction - accumulation contradiction in favour of accumulation. The state acts to secure accumulation at the expense of reproduction. That is, the state decreases its commitment to the social welfare of its population, while it increases its willingness to generate the necessary conditions that would make the country's economy globally competitive. In this climate public policy in the area of education (and other areas of social provision) is subject to austerity measures which influence the nature of its provision negatively. National policy dynamics thus interact with this constricting policy environment. Where the state's reproduction activity is curtailed, its subsequent legitimacy deficit is likely to be shored up by public and education policy. It is in this context that neo-liberalism arose as the dominant ideological force that shapes public and education policy.

Understanding the impact of the world system on education policy necessitates an evaluation of global processes and their interaction with national policy formulation. To this end I will focus on defining what has generically been referred to as 'globalisation', the functioning of the state, the economic and structural changes associated with globalisation and the role of supranational organisations. I will also focus on the broad educational reforms associated with the new context and specifically on the incessant emphasis on narrowly relating education to economic development. My main claim in this section is that globalisation operates as a 'diffuse social movement' whose influence is extended to all public spheres. Globalisation thus provides a constricting framework in terms of which national education policy has to be constructed. Following Watson, I will explore the extraneous influences inherent in global dynamics that are "impinging on and influencing all national education systems and to show in which ways they are shaping the agenda and informing opinion" (1995: 1).

2.5.1 Defining globalisation

Regarded as a varied phenomenon by most theorists, there is no precise and consensual definition of the term. Globalisation is commonly regarded as a hugely important part of life in the 1990s and as a continuation and intensification of international influence from colonial times and more specifically after the second world war. While acknowledging these linkages in continuity, Stewart (1996) points to two aspects that currently merit the insertion of globalisation as a prime analytical category. These are: 1) the acceleration of internationalising all dimensions of life including economic relations, technology, ideology and culture and 2) increased linkages between these dimensions (Stewart 1996: 327). Mittelman aptly captures a broad definition of globalisation when he comments that a "massive transformation is being compressed into a short time - a few years rather than many generations - and often despite officially managed processes" (1996:1). Globalisation directs our attention to many fundamental changes underway since the late 1970s into the 1990s and which will continue to shape the world political economy into the new millennium. These changes occur within the following areas: the spread of financial markets and consumer goods all over the world, the reorganisation of production and labour and massive population transfers (see Mittelman 1996, Watson 1995, Swatuk and Shaw 1994 and Stewart 1995). Globalisation comprises a dual process of disintegrating old world structural patterns which revolved around the nation-state, while it at the same time involves a global reintegrating process which is economically determined. Reintegration erodes the efficacy of the state's control over its national political economy.

Globalisation fundamentally involves the transfer of knowledge, production and manufacturing patterns, and information across national and continental boundaries. The transfer usually happens unidirectionally from the north to the south through ever-changing information technology. Powerful ideas on global processes are also electronically transferred via the media, international conferences[22] and supranational organisations. A list of agencies and organisations active in global transfer include: 1) politico-economic grouping of nation-states, e.g. the European Community (EC) and Organisation of African Unity (OAU), United Nations (UN), 2) trading groups of nation-states, e.g. the North Atlantic Free Trade Organisation (NAFTA) and Association of Southeast Asian Nations (ASEAN), and 3) supranational organisations such as the World Bank (WB) and International Monetary Fund. Crucially, global transfer is driven by economic patterns associated with the spatial reorganisation of production. Trans- and multinational corporations are the spearheads of globalisation processes. Confirming the economic view Ghai (1994: 15) defines globalisation as the increasing integration of the world economy. Mittelman, favouring a broader definition, comments that as a worldwide phenomenon

> ... globalisation is a coalescence of varied transnational processes and domestic structures, allowing the economy, politics, culture and ideology of one country to penetrate another. ... driven by changing modes of competition, globalisation compresses the time and space aspects of social relations. In short globalisation is a market-induced, not a policy-led, process (Mittelman 1996:3).

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[22]. International conferences on a diverse range of topics from computer technology to manufacturing and technological developments have proliferated over the last decade. Four influential conferences held during the first half of the 1990s were: the global ecology conference held in Rio de Janeiro, the population conference in Cairo, the gender equity conference in Beijing and Universalisation of Primary Education conference held in Jomtien, Thailand. These conferences dealt with specific social and developmental issues that, partly because of the increasing globalisation of the world, have shown disturbing negative developmental trends.

2.5.2 Globalisation and the economic dimension

Despite the risk of economistic labelling, there is broad theoretical agreement in the literature that economic change is at the root of a rapidly reconfiguring world. Ilon argues that "a global system of economics is establishing a new set of rules and that public policy, often de facto, is being set by such rules" (1994: 95). Economic changes set in train wide-ranging ideological, political and social consequences which led to increased inequality, poverty and social conflict in LDCs.

Global change processes started in the industrialised world. Precipitated by the oil crisis in 1973, industrialised countries experienced economic recession characterised by inter alia: falling growth rates, increasing unemployment and rising inflation. This period was preceded by two decades of high profit rates and growth. Right-wing politics in industrialised nations responded to the crisis by launching indicting critiques of the faltering, essentially social democratic and welfare-orientated political and economic settlement. A new consensus emerged which put the blame for the economic crisis on the inflationary consequences of old policies.

Immediate policy adjustments were made to address the economic crisis. These included the following short-term measures: tight monetary control, anti-inflation measures and high interest rates. New, more radical policies would be required in the longer term to extend market forces and to redefine the role of the state. Instead of policy intervention and regulation, the state now actively pursues policies and strategies to secure market deregulation. Ghai (1994: 18) argues that the deeper causes behind the upsurge of market forces and the changing role of the state must be sought in increasing global integration. This integration was facilitated by the "rapid expansion of transnational enterprises (TNEs), spurred on by market liberalisation and technological processes, that made a powerful contribution to the internationalisation of the world economy" (Ghai 1994:18). Mittelman remarks that

> TNEs have been at the heart of global and economic integration. They have spearheaded technological progress and foreign direct investment and played a role in international transactions in goods and services, foreign exchange and stocks and bonds (1996: 3).

The shift in economic organisation from fordism to post fordism lies at the root of current worldwide economic change. Fordism, which was pervasive from the start of the twentieth century until the 1970s, represented the monopoly phase of capitalism. Mass production of standardised goods was concentrated in monopoly corporations and depended on mass consumption and consumerism. The Keynesian state regularly intervened to regulate market failure and provide social welfare measures to secure the reproduction of capitalist social relations (Mathews 1989: 117). Work organisation was hierarchical and emphasised narrow single-task jobs with repetitive routines for which only limited vocational skills were required. Fordism began to dysfunction by the early 1970s because of its inability to contain contradictions such as its production inflexibility and rigidity of labour markets.

The weaknesses and contradictions within fordism gave rise to economic restructuring in many countries which embodied an attempt to reestablish the new conditions for capitalist accumulation and profitability (Mathews 1989: 118). Post fordism is characterised by the following: integration of world markets, rise of new technology, flexible specialisation in production and an economy based on quality manufacturing. This requires an integrated education and training system that inculcates broad-banded generic skills and a wide general knowledge. As Hager and Laurent argue "post-fordism requires the development of skills which result in innovation" (1990: 55).

The shift from fordism to post fordism[23] does not apply in like manner to LDCs as to the northern countries. The economies of the LDCs are unevenly developed and have very small industrial sectors. Post fordist activity is thus limited to certain small pockets of the economy. The rest of the economy is made up of a mixture of rurally-based subsistence economies, fordist factory-type work environments and labour intensive mining sectors. It is therefore difficult to speak of the transition to post fordism in LDCs because of their uneven economic development as well as structural and institutional constraints (Kraak

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[23]. The shift from fordism to post fordism involves fundamental changes in production processes. Post fordism has to be distinguished from globalisation which refers to the rapidity of commodity, technology, skill and capital transfer. These two processes (post fordism and globalisation) are central constituent features of the contemporary global economic environment. But, a global economic system did exist in large parts of the world on the basis of a fordist production framework until prior to the collapse of the Soviet bloc in 1989.

1991: 45-47).

Globalisation, led primarily but not exclusively by global economic change, is affecting different world regions differently. Ghai argues that "while liberalisation has become a truly global phenomenon, the contexts in which it has been carried out and the patterns it has assumed have tended to vary by regions and countries" (1994: 22). While there have been adaptational variations in both the north (within old industrial countries such as the United Kingdom and the United States of America and countries such as Norway and Sweden) and the south (within countries in Latin America, Africa and South East Asia), a broad distinction can be made between the two regions. Globalisation in the industrialised world represents a continuation of development patterns laid down in the post war period. It also had more stable economic and social institutions which could adjust to the effects of globalisation. Industrialised countries could thus adapt more readily, although not painlessly, to global processes. However, adjustment in LDCs associated with globalisation "constituted a sharp reversal of past policies" (Ghai 1994: 25) under pressure of northern countries and institutions[24]. This had a deleterious effect on development. It caused a sharp reversal of modernisation and industrialisation projects which LDCs had embarked upon immediately after their decolonisation.

2.5.3 Globalisation and structural adjustment

Structural adjustment constitutes the long term process through which fundamental restructuring of the global economy is effected. As a process driven by world financial institutions such as the World Bank and the IMF, structural adjustment aims to align national economies with international trade forces. Thus, it promotes the adjustment of economies to the global economic environment without which, as Ilon (1994: 96) suggests, countries' economies would not survive. Contemporary structural adjustment measures revolve around four key structural shifts: the liberalisation of the economy, the deregulation of markets, privatisation of state-owned utilities, and the stabilisation of the economic and political environment (Ilon 1994: 96). Some of the adjustment measures include: 1) reduced state subsidies, 2) currency devaluation, 3) reduction of price controls, 3) reduced public expenditure, 4) trade policies to encourage exports, 5) privatisation of state enterprises and social services, 5) restraints on wages and public employment and 6) limits on credit expansion (see Samoff 1994, Graham-Brown 1991, Stewart 1995 and Ghai 1994). The sum of these measures has led to the emergence of a current policy environment dominated by austerity and fiscal discipline which in turn has impacted negatively on social policy[25]. The most important consequence of structural adjustment is the impact it has had on limiting the autonomy of governments. It has placed limitations on governments' choices with regard to entering a globalised environment. Many theorists agree that countries cannot ignore the global political economy because of the dominance of export-led growth. It is argued that a country's economy could only grow if its production sectors target international markets (Ghai 1994 and Mittelman 1996). Countries cannot survive solely on the basis of internal markets (Ilon 1994: 96) and therefore cannot ignore interaction with global markets. Thus, they are required to embark on structural adjustment, whether voluntarily or brought about through active persuasion (read coercion) by the world financial institutions. In this regard, Ilon makes the following telling comment:

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[24]. For a detailed discussion of the manner in which international institutions influence the policies of LDCs, see Jones (1992), Samoff (1994) and Graham-Brown (1991).

> As the global economy grows in importance, governments must not just learn how to 'handle' their interactions with the large world, but how to 'manage' them. Adjusting the structure of the economy to facilitate international commerce is an increasing pressure. Even if the government is not contemplating a loan from the World Bank, it may be under intense pressure to employ adjustment policies as a means of pursuing economic growth - or as a means of mitigating economic decline (1996: 96).

This situation has major negative implications for equity-led public and education policies especially in LDCs.

2.5.4 Globalisation as a 'diffuse social movement

My position with regard to the influence globalisation has on education policy is that globalisation operates as a 'diffuse social movement'. It has an all-pervasive influence on education. It affects the entire public education process. Globalisation has particularly negative consequences for equity-led education policy and practice in the south (I will elaborate on this issue in the last section of this chapter). Despite encompassing the entire policy edifice in a diffusive manner, it has a differential impact on the various educational subsectors (e.g. UPE, higher education, and further education and training) within countries., For example, the outcome of the project to universalise primary education in a country would be substantially different to the outcome of curriculum reform, despite both of these projects being subjected to global influences. This difference can be atttributed to the different forces operating in these subsectors on both the international as well as the national level. The interaction between global influences and national dynamics, which varies from sector to sector, would determine policy and practice in these sectors. It is thus my view that while globalisation has a pervasive influence on all education policy and has to be a key part of policy analysis, the impact it has on the educational subsectors varies from sector to sector. Educational analyses thus must be focused at the level of the interaction between national and global dynamics within specific educational subsectors.

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[25]. Stewart (1995) lists the following as negative outcomes of globalisation and structural adjustment: falling per capita incomes, investment rates and consumption; growth in unemployment; rising inequity in income; rising poverty rates; falling availability in food; cuts in health and education expenditure; and worsening of education enrolment rates.

By referring to globalisation as 'social movement' I want also to highlight the manner in which global forces coalesce to influence developments in countries and construct the policy terrain. This is done in a context where left-inclined social movements[26] have been sidelined by the neo-liberal politics associated with globalisation. With leftist social movements weakened, global forces have become hegemonic in the processes of constructing educational politics in terms of which policies are enacted.

2.5.5 Neo-liberalism

The politics of neo-liberalism emerged in the mid-1970s in northern countries such as Britain, France, Germany and the USA. It impacted upon the policy environment of the LDCs through the influence of multilateral loan and aid agencies such as the World Bank

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[26]. See Mittelman (1996), Woodhall (1994), Ilon (1994), Munck (1993) and Schuurman (1993) on leftist social movements in the neo-liberal age. They all concur that the hegemonic social movements' current mobilisation around issues such as ethnicity and religious parochialism is at root a contest over limited resources. This does not bode well for equity-based politics.

(Manor 1991: 307). Neo-liberalism unfolded in response to a number of converging elements on the international political and economic terrain. Some of these were: distortions in the productive capacity of the capitalist economy, recession, rising inflation, and hostile labour relations. The 'overconsumption' of the welfare state in supplying social and welfare services was projected as a drain on the public purse. Right-wing politics successfully portrayed the view that the state was spending too much on the provision of social security, welfare, health care, and disability services (see Troye 1991:321-325).

As I have described earlier, state welfarism came under attack in the context of an international crisis. The social democratic settlement, which linked politics with state welfarism in a capitalist framework after the second world war, was challenged and displaced by a new consensus that propagated for a decrease in social consumption and welfarism (Kallaway 1988: 509). Neo-liberalism emerged as part of an overall attempt by capitalists to secure the reproduction of new social relations in a rapidly reconstituting global economy.

The welfare state has been criticised as an inefficient and wasteful provider resources and services. Neo-liberalism touted the market as a more efficient mechanism in allocating public resources. The welfare state was replaced by the twin features of a 'smaller state' on the one hand, and a bigger role for the market in providing social services on the other. Privatisation became a key mechanism in terms of which consumers would be afforded the 'democratic right' to make choices with regard to social services such as schools, hospitals, sanitation and postal services. In broader terms, privatisation is the spearhead of a major international campaign to recapture for the capitalist classes many of the resources won over generations of struggle by working people (Innes 1987 and Manor 1991).

The state's retreat from social welfare provision on the one hand, and intervention in getting 'market fundamentals' right on the other, led Navarro to observe that the politics of "the New Right ... represents not a weakening but a further strengthening of the authoritarian state" (1982:54). This is borne out by the state's active involvement in procuring capitalist economic growth. Neo-liberal economists asserted the primacy of economic growth among competing policy objectives, believing that poverty will thereby be effectively reduced. According to them, slow economic progress in developing countries has been mainly caused by government intervention. Market-oriented principles and policies have been advocated to correct this situation. In this regard some of the neo-liberal features that were put in place have been: 1) state intervention in establishing the primacy of economic growth, 2) market oriented policies and principles, 3) market price manipulation, and 4) demand side financing (see Colclough 1991: 5-19 and Patrinos and Ariasingam 1997: 1-6). Thus, contrary to promises of less government, neo-liberal politics has led to greater state involvement in establishing appropriate conditions for the optimal functioning of the market. Manor describes it thus:

> The state ... has certainly contracted (in decreasing its provision of social services), but has grown quite markedly, in other respects, to perform other tasks that were unnecessary before liberalisation. ... new judicial institutions had to be generated ... the state also developed new instruments to regulate and, more especially, to abet market forces (1991: 309) (my insertion).

2.5.6 The impact of globalisation on education

I now provide a discussion of the generic impact of globalisation and structural adjustment on education policy and practice. As I described above, globalisation and structural adjustment involve fundamental systemic societal changes which primarily occur at the economic level. This has a knock-on effect in all spheres of life not least public and social services policy. Education has been subjected to structural adjustment. Measures have been implemented to bring education in line with the hegemonic economic environment. It is argued that educational adjustment is required to allow a country to adapt to, and survive, in a continually reconstituting global environment (see Stewart 1996). Thus, educational adjustment measures were instituted in most LDCs, ostensibly with the view to gain entry to, and comparative advantage in the global economy. However, evidence showed that the outcome of these changes has been highly questionable. Despite claims to the contrary I will argue that education provision and practice have suffered severely. To illustrate this I concentrate below on 1) the educational adjustment measures implemented, and 2) the link between education and economic growth.

The most important consequence of globalisation and structural adjustment on education policy has been that it instituted a financially austere environment (see Samoff 1994 and Colclough 1991) which initiated what has been referred to as a "culture of cuts" (Graham-Brown 1991: 36) in educational provision. Most affected governments, advised by international monetary organisations, had to run their educational programmes with a marked decrease in their education budgets. For example, between 1980 and 1989 education spending decreased by between twenty and forty percent in most countries in Africa and Latin America (35-38). Financial austerity resulted in the collapse of the close linkages in former years between social welfare and education on the one hand and the government's legitimacy on the other hand. Increasingly governments tended to derive a political environment which depended less on delivery of social services and more on the symbolic potential of policy. Policy in this context becomes a matter of seeking legitimacy (Weiler 1985) to compensate for the state's decreasing commitment to the provision of social services.

Financial cutbacks in education led to two interlinked responses, i.e. 1) the reduction of educational expenditure and 2) the implementation of education policy reform driven by cutbacks. In other words, education policy has to be developed in a context of fewer financial resources. The policy measures adopted fundamentally altered the substance and provision of public education. The literature indicates that the list below constitutes some of the education policy choices that had to be made as a result of financial austerity:

- the priority given to education, relative to other sectors
- the allocation of expenditure between levels and types of education
- mobilization of new sources of income
- improving the efficiency of resources
- fundamental restructuring of the education and training sector (see Samoff 1994, Watson 1995, Graham-Brown 1991, Woodhall 1994, and Ilon 1994.)

Governments have been saddled with a smaller overall budget from which they have to fund increasing social demand. The result has been cutbacks in most social services. Cuts in the educational portion of the budget have often been justified on the basis that sectors such as health and welfare are more deserving in a poverty-stricken environment (see World Bank 1995). The overall budget thus could be likened to the proverbial smaller cake that has to be cut to feed increasing demand from different sectors, with education often being targeted for a reduction in budgetary allocation. However, in some countries, mainly because of the strength of social movements such as teacher unions, education maintained the proportion of its budget while cutting in other sectors took place (Graham-Brown 1991: 37). Lewin points out that "educational expenditure in many developing countries has fluctuated widely from year to year, without necessarily following a long-term trend" (1988: 15). Notwithstanding the relative apportioning of the budgetary allocation to education compared to other sectors, the real level of educational expenditure dropped considerably as a result of the growth in numbers entering the system without concomitant growth in the education budget.

Tough choices have had to be made with regard to the type of expenditure targeted for cutback. The trend has been to cut capital and recurrent expenditure. Governments have thus been unable to fund the building of new schools and have only been able to provide a minimum level of educational resources. Between 1975 and 1985 expenditure on teaching materials in sub-Saharan Africa fell from 7.6 percent of the educational budget to 4.2 percent and in Latin America from 4.4 percent to 1.8 percent (Heyneman 1989: Table 17). This has had an impact on the quality of education provision.

Teachers' salaries which constitute the largest share of the education budget have also been targeted for reduction. There are a number of ways in which this is done. Teachers' salaries, although an unpopular option, can simply be slashed, or a freeze on increases can be put in place. The average reduction in the real value of teachers' salaries in sub-Saharan between 1980 and 1985 was 35 percent (Zymelman and Stefano 1989: 35) Many teachers do one or more other jobs to augment their uncompetitive salaries. Graham-Brown suggests that "moonlighting among teachers is nothing new, but the scale of the problem now seems to be out of control" (1991: 40). Teachers can be retrenched or not be replaced when they leave the service (Samoff 1994: 226). Preservice education may be reduced. The overall effect has been to demoralise the teacher corps and decrease their commitment to their jobs.

Governments have had to make tough choices with regard to the priority and commitment they give to the various education subsectors. Questions such as whether primary schooling should be preferred to secondary schooling, the length of primary schooling and whether higher education should be more vocationally or academically oriented have had to be confronted. A decreasing budget means that none of these sectors can be adequately funded.

Funding choices have had to be made around sustainability and relevance. Governments choose to fund those sectors it perceives to be most relevant to the development needs of the country. Thinking and practice with regard to these choices have shifted over the years. For example, UPE was a popular choice during the 1950s and 1960s. Its popularity waned in the 1970s and 1980s, but it re-emerged in the 1990s to become the single most important policy option in educational development. Thus, the general trend today is to target UPE because of its apparent sustainable impact on people[27]. Higher education has been curtailed and secondary education has become less prominent.

Many measures have been implemented to mobilise new resources and to use it more efficiently. The introduction of user fees to augment public funding has been popular (Watson 1995: 11). Parents have been encouraged to contribute to the running of schools. In order to gain parents' cooperation local school communities have acquired limited governance powers while states have maintained control over crucial areas of school governance and the curriculum in order to keep its political and ideological hold over education. Private education has also been encouraged to ease the burden on the state.

With regard to efficiency many measures have been instituted. Notwithstanding the real problems education systems experience with the inefficient use of resources and wastage, the argument for efficiency is driven by having to curtail spending. Double and triple shifts have been introduced to cater for the increasing number of children. In rural areas multi-grade and dual language medium schooling have been offered. Class sizes have skyrocketed. Repetition and drop out rates have been targeted for reduction. Learning resources have been curtailed. According to Graham-Brown "clearly these conditions damage the learning environment and the morale of teachers and students, they also affect the quality of education, already low in many places" (1991: 41).

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[27]. See the World Bank's 1995 education sector report for its position on the importance of UPE in development.

School attendance patterns have begun to manifest along global lines in the light of the impact of globalisation on the nation-state and citizenship. Watson (1995) and Ilon (1994) concur that the role and function of the nation-state had undergone fundamental revision under the impact of globalisation. The organisation of public life is occurring less and less under the aegis of the nation-state. Associational patterns are manifesting globally along class lines. In such a context the impetus and rationale for national funding of education are set to erode (Ilon 1994: 97). Whereas education was linked to nation-building, it now serves to integrate people and nations into the global economy. The erstwhile quest for national identity and common citizenship has given way to the construction of citizenship and identity along global lines. The notion of community is also subject to corrosion. This shift away from community and national citizenship is displayed in the increasing attendance by children of schools outside their communities. There is a clamour to attend either private schools or well-resourced public schools. The global poor has to be satisfied with low quality education. Education systems have thus been emerging in LDCs which are differentiated along class lines. Whereas dual educational systems have always existed in LDCs, the 1990s have seen the consolidation and entrenchment of dual systems, but with the difference that these are now globally constituted. This has led Ilon to suggest that "a national system of schooling is likely to give way to local systems for the poor and global systems for the wealthy" (Ilon 1994: 99)[28].

2.5.7 Closer linkages between education and the world of work

The restructuring of education as a result of globalisation has introduced a concern to develop closer linkages between education and economic development. The assumption underlying these linkages, I believe, are fundamentally flawed. A powerful argument is made, under the influence of the re-emergence of human capital theory (see Burnett

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[28] See Illon (1994) for a discussion of global schooling patterns. Her categorization of schools describes a generic worldwide trend. Its manifestation in different countries varies according to specific national and local circumstances.

1996 and Burnett and Patrinos 1996), that economic growth is dependent on a country's education system's ability to produce globally competitive skilled labour. This is said to be even more important within the context of the globalisation of world markets. This position, while explaining the route relatively successful countries have taken in their economic and educational development, runs into problems in LDCs where there are currently low rates of development. Whereas the success of countries in a global context in part depends on a functional educational environment, structural adjustment measures impede LDCs from developing such an education system. In fact, as a result of financial stringency, education in LDCs is deteriorating.

How do proponents of the HCT view argue their position? They start from the assumption that the global economy *spatially* separates the production of goods and services from their consumption. (Stewart 1996: 328-329). This places any country potentially in a position to produce for the high consumption market of the industrial world. With the possibility of producing for this market, the LDCs growth is not impeded by their own limited markets. Furthermore, comparatively low costs of labour in LDCs make these countries attractive for much-needed foreign investment. Thus, LDCs can embark on an upward development spiral if they produce high quality consumption goods at low cost for the foreign market. Growth in LDCs would thus be export-led. This development path aptly describes the economic development of some South East Asian countries over the last two decades (see Mittelman 1996, Kraak 1991 and Mathews 1989)[29].

Extending the above argument to education, the HCT view maintains that education is the main factor that would enable the LDCs to embark on export-led growth. Based on rates of return analyses, this view concludes that economic and social development is dependent on education, particularly its (education) capacity to produce the requisite human resources to work in the sophisticated manufacturing sector (Stewart 1996: 331). In this regard the integration of education and training is viewed as crucial in laying a solid foundation for a skilled citizenry. An integrated system should provide people with high-level technological and information manipulation skills which are transferable across industries. It should focus on broad banded skills and technological literacy which would allow workers to operate with the necessary flexibility to enhance quality and the scope of production. It is argued that an economy with a highly skilled workforce would more readily attract foreign investment (Stewart 1996: 331).

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[29]. Such development in countries like Malaysia, South Korea and Japan, came at great political and social cost. The people of South East Asian countries suffered from political repression, poor working environments and environmental degradation. These countries have, however, shown decreasing infant mortality rates and poverty reduction which indicate some improvement in the level of development.

The HCT view correctly argues that globalisation has introduced a strong causal link between education and economic development, i.e. where education plays a large part in determining economic success. However, it fails to take into account the fact that globalisation imposes structural adjustment which makes it difficult, if not impossible, for most LDCs to develop a globally competitive education system. Financial austerity, the result of the neo-liberal emphasis on a minimal state and the triumph of the market, results in the deterioration of education which encourages low enrolment and a high drop out rate. The delivery of an integrated education and training system is thus compromised. LDCs are caught in a vicious cycle whereby their weak educational bases thwart educational improvement which prevents education from playing a crucial role in broader development. Thus, the assumption that education restructuring will lead to economic development in the global economy cannot be sustained. While economic development does depend in part on education, financial austerity associated with globalisation makes it difficult for LDCs to develop competitive educational systems.

Stewart argues that

> ... to break out of the cycle of failure requires simultaneous efforts on many fronts: to build up the educational sector; to create the infrastructure which is needed to attract investment and make it productive; and to provide the rewards that are needed to prevent emigration of the skilled (Stewart 1996: 333).

He continues with the contention that

> A requirement is that the critical importance of education is recognised, so that the sector is treated as a high priority investment, not a luxury consumption item (Stewart 1996: 322).

Central to a critique of the causal link between education and development is an appropriate conceptualisation of equality and development. This will be the focus of the last section of this chapter.

In sum, in my focus on the relationship between globalisation and education I have highlighted the influence of global processes on national education policy. Driven by changes in global economic processes, globalisation has come to impact fundamentally on nations' functioning and specifically on the role of the state. Under the influence of structural adjustment which purportedly aims to facilitate entry into the global market, the state takes on a minimalist role in the public provision of social services. As a result education (and other social services) has been subjected to financial austerity measures. Educational reform has been characterised by sharp budgetary cuts which led to various negative policy measures. Educational provision has thus been compromised severely in LDCs. Global educational patterns have begun to manifest. The links between education and nation building, community and citizenship have become tenuous. A globally constituted educational system along class lines has been forthcoming. A differential schooling system and curriculum have come to serve different classes of people depending on their position on the global economic ladder. The assumption that a country's education system determines its global economic performance is sustained to the extent that economic growth is partly dependent on the existence of a high quality integrated education and training system which can produce flexibly skilled labour to manufacture quality goods. The assumption, however, is tenuous to the extent that financial austerity that globalisation induces makes it almost impossible for LDCs to develop a quality education that would determine economic performance. A paradox thus becomes apparent. Whereas countries require a quality education system to succeed in the global economy, the adjustment measures they are forced to adopt to enter the global economy prevent the construction of such an education system.

My focus on the role of globalisation in education is not intended to present a deterministic understanding of education policy. Rather, I have tried to illustrate the generic impact of globalisation on education in contemporary times. Throughout this chapter I have been at pains to highlight, drawing on Ginsberg et al.'s world systems perspective, the interplay between global and national processes in education policy making. I have argued that globalisation functions as a diffuse social movement to indicate the pervasive impact of global processes over the entire education policy edifice.

The extent of the influence of globalisation is subject to the interaction between global forces and national forces within specific education subsectors. The substantive outcome of policy making in these subsectors might thus vary given this interaction. This thesis examines precisely this interaction between national and global forces in determining policy meanings in different subsectors of the newly emerging South African education system.

2.6 Education policy making

I now move on to the question of how education policy is made[30]. Policy is the result of compromise, negotiation and ideological and political contestation and is interpreted differently by the various role players depending on their particular location. A focus on the policy making process reveals the underlying processes and dynamics that constitute policy and the manner in which different sectors interact with policy, leading to varied expressions and reactions. I aim in this section to outline a framework in terms of which the education policy making process could be assessed. The nature of the policy process has an important bearing on the kind of policy that eventually results in legislation. I focus on: policy paradigms, defining policy, frameworks of education policy analysis, and the policymaking process.

Theorising about the nature of education policy has its academic roots in the consensus academic tradition deriving from Parsons which dominated the social sciences after the second world war until the mid-1970s. Based on strong empiricist inclinations and a tradition of rationalism (Chibulka 1994: 105), earlier education policy theorising viewed the state as a neutral arbitrator between the divergent interests of different groups involved in and affected by policy. The public policies enacted were viewed as a means of effecting greater rationality and control in creating a functional educational environment. The state's involvement in policy was thus regarded as uncontroversial and in the interest of the public good. Such policy, under the influence of a public administration tradition, revolved around issues of planning and establishing greater cohesion in the area of educational governance (Ranson 1995: 429).

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[30]. Education policy analysis in South Africa has become a nascent field of educational academic enquiry during the 1990s. For examples see Kallaway et al. (1997), De Clerq (1997a and 1997b), Christie (1994) and Badat (1991).

The consensus paradigm came under attack in the mid-1970s particularly from neo-Marxists out of which an alternative policy paradigm under the name of critical policy sociology[31] emerged. While this paradigm has its roots in neo-Marxism, theoretical debate has moved beyond earlier narrow structuralist explanations to incorporate a nuanced understanding of the structure - agency relationship. Ranson neatly summarises critical policy sociology's approach to agency when he says that it "embraces agency and the ideological category of the individual so that any explanation of policy must involve what individuals and groups actually do and say in arenas of influence" (Ranson 1995:435).

But, agents do not act outside contexts and structural conditions which circumscribe their practices. Ball, quoted in Ranson, explains:

> The role of representative institutions in social democratic politics is constrained and distorted by obvious inequalities of power inherent in capitalism. We have a 'deformed polyarchy' wherein behind the facade of public politics, the state also responds, directly, immediately and sensitively to economic pressures from business, both those expressed in overt and latent use of economic muscle and the considerable presence of business influence inside the various input channels (in Ranson 1995: 435).

Ball argues that education policy is constructed within three distinct levels which each need its appropriate theoretical strategy. The first is the economic or structural level which requires a structural analysis. This analysis examines the contribution that education makes to productivity and therefore the relationship of education to capital accumulation (Ranson 1995: 435). The second is an analysis of the political level which involves understanding of the "politics and governance of education and the changing interventions of influential groups and constituencies in the political process" (1995: 435). The third level involves an analysis of the ideological dimension which includes the way in which education policy is conceived, discussed and represented. This according to Ransom amounts to understanding the ways in which education is involved in the transmission of the dominant culture (1995: 435). In order to make sense of the complex policy world, critical policy sociology advocates analysis of each of these distinct levels as well as the interaction among them.

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[31]. Critical policy sociology is also described as an endeavor in contemporary history in terms of which patterns of domination and inequality are analysed and exposed (Ozga 1987).

Critical policy sociology concurs with the view that while economic structures set boundaries to ideological and political forms, they constrain and circumscribe rather than predetermine in any mechanistic manner how those forms develop (1990: 436). Thus, the economic structure delimits (as opposed to determining) the political and ideological levels. Ball (1990: 11) contends that each level has effects in its own terms on the nature and possibility of education policy. Thus, each level is given a relatively autonomous role in shaping education policy within a delimited and circumscribed structural environment. A useful description of 'autonomy' of the different levels is provided by Saunders:

> Each level, that is, is relatively autonomous of each other level, only relatively so, since each level is necessarily affected by the specific effects of each other level; they exist only within a unified system, in which case total autonomy clearly becomes impossible (1981:183).

Such a framework enables one to have a dynamic consideration of education policy. Each level can be considered in its own terms, but the contradictions among the three levels can also be explored.

The literature shows a lack of consensus on a definition of policy. The term 'policy' could variously refer to defining objectives, setting priorities, describing a plan or specifying decision rules (Gordon 1993:7). A further complication revolves around the spatial dimension of policy, i.e. whether policy is entirely before action (which the earlier policy paradigm advocated), whether it involves action, or whether it is a post hoc generalisation, rationalisation or elaboration of decisions already made by government. The general vagueness over a definition of policy is displayed in the nebulous reference to it as "simply what governments choose to do or not to do" (Prunty 1985: 135).

Critical policy sociologists advance some pertinent views on the definition of policy, what it is, how it is constituted and the values it projects. According to them policy represents a political commitment to a set of social ideals that are constructed in deeply contested ideological and political processes. On this view policy is regarded as a matter of "the authoritative allocation of values; policies are the operational statements of values, statements of prescriptive intent" (Kogan 1978:55). This view is supported by Prunty (1985) and Ball (1990). This definition lays emphasis on values which are socially located and are thus neither free-floating nor neutral. Any government chooses to favour the institutionalisation of certain values over others. Choice over values is made in social context (Ball 1990: 3) and thus leads to the question about whose values are embodied in policy and how it has become dominant. Prunty extends this perspective by highlighting the centrality of values in education as a public project. He states that

> Indeed, values form the very foundation upon which the education edifice stands. Far from possessing intrinsic, objective worth, values, like beauty, lie in the eye of the beholder. To ask what counts as knowledge and culture in the schools is also to ask 'whose values have been validated?' (Prunty 1985: 137).

Critical policy sociologists thus point to the centrality of power and contestation over whose values are projected in policy and how it has become institutionalised. They argue that it is not enough to consider whether there has been fair play and due procedure in policy construction. They are more concerned to place the criterion of justice at the forefront of policy (Prunty 1985). The policy process is vigorously contested politically and ideologically in order to insert the moral dimension which emphasises justice as a social ideal (Prunty 1985: 137). Thus, unlike the older policy paradigm's view that policy represents the neutral intent of the state to resolve problems and to enhance operational functionality, the critical paradigm convincingly suggests that while policy represents a statement about the ideal society, it logically derives from conflicting and value-laden processes. An understanding of the dynamics involved in these processes will reveal much of the actual meanings of policy.

Policy incorporates statements of intent, courses of action, resource allocation and could be about the resolution of problems. It is normative in intent and a projection of ideals. Policy could have different objectives including: regulating institutional functioning, mapping courses of action and enforcing or enabling particular courses of action.

De Clerq (1997:146) distinguishes between substantive and procedural policies, the former referring to the ideal vision the state commits itself to, and the latter stipulating the actions and mechanisms through which the policy vision is to be attained. Substantive policies are more about stating rhetorically the need for change while material policies stipulate resource provision. Substantive policy has also been described as guiding or root policy, while action-orientated material policy is termed as operating or steering policy (Hough 1984: 4). Regulatory policies are concerned with limiting the behaviour and actions of groups. Redistributive policies focus on the need to equitably reallocate resources among the population (Hough 1984: 146). It is clear from the above outline that one can distinguish between two policy types. On the one hand policy could emphasise goals, vision and the need for change, while on the other policy could specify courses of action and practical implementation.

Public policy in education (and in any other field) can be expressed in different forms. Policy is contained in parliamentary legislation, ministerial documentation or department circulars and policy papers. Government policy finds expression in ministerial statements, green and white papers, Bills and Acts and amendments to Acts. The development of official legislation could be traced by examining these type of documents. Policy documents are also produced outside the confines of the ministry. Parliamentary debates, parliamentary committee hearings and parliamentary portfolio committee proceedings are instructive in understanding government legislation. Policy centres, commissions and non governmental organisations generate vital documentation that feeds into the legislative process. This diverse range of documentation provides essential raw material for the education policy analyst.

Ball's reference to 'policy as text' refers to documentary analysis (1994: 16-21). He argues that policy texts are the products of negotiation and compromise. The text has a representational history and has to be operationalised within existing patterns of inequality (1994:17). Ball argues that "policy is not exterior to inequalities, although it may change them, it is also affected, infected and deflected by them" (1994: 17). As text, policy represents the state's expressed interventions in the public domain. But, as Ball emphasises, the implementation of policy depends on things like commitment, understanding, capability, resources and cooperation (1994: 18). Because these capacities are not similarly available throughout the education system, they are often ideologically constructed, policy could be subjected to "creative non-implementation" (1994: 20). This could lead to it (policy) being either partially or wholly undermined in practice. I will by and large limit my analysis in this thesis to policy as text, in other words, I will focus on the textual meanings of policy. This will incorporate an analysis of the processes in which policy is formulated.

The education policy making process can be conceptualised in terms of two broad models namely the rationalist and the political models. The rationalist model assumes that policy making is essentially a rational process which operates linearly through classical steps (see Kruss 1997: 2 and De Clerq 1997: 146). Badat (1991) provides a characterisation of these steps. The first step is agenda-setting which involves stipulating policy priorities. The second step is policy formulation. The third and fourth steps involve policy adoption and policy implementation respectively. In step five policy is evaluated to determine whether policy implementation has been successful. The identification of policy shortcomings starts off a new policy cycle (Badat 1991: 19-23).

Badat's model, while useful as a starting point, does not account for the complexity of the policy making process. His linear depiction of the process suggests that the five phases are distinct and non-interactional. This depiction of the policy process is an example of the way the rationalist model view the policy making process. This model views educational problems as requiring technical solutions. Policies are seen as "blueprints which exist prior to action, and are implemented on the external world through a controlled process which is assumed to be a consensual one" (Kruss 1997: 2). Policy formulation is seen as the responsibility of politicians and their representative institutions. Policy implementation is regarded as the "rational administrative activity of a politically neutral bureaucracy whose actions are directed at the achievement of the policy objectives or directives of the politicians" (De Clerq 1997:146). By separating policy formulation from policy implementation, the rationalist model conforms to a mechanical distinction and separation between theory and practice. This conception attempts to hide from view the political and ideological influences which shape policy. This is an attempt by protagonists of the rationalist model to present policy as a neutral and rational set of prescriptions to remove dysfunctionality out of the education system[32].

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[32]. Gordon (1993: 8) notes that despite criticism the rational model still dominates most governments' understanding of the education policy making process.

The political model provides a more plausible conception of the policy making process[33]. This model emphasises the centrality of power relations, conflict and contestation in shaping policy. It is critical of the notion that "implementation is a matter of automatically following a fixed policy text and putting legislation into practice" (Bowe and Ball 1992: 12). This model implies that there ought to be much greater recognition of the interaction between policy texts and implementation in practice. The political model endeavours to expose the political and ideological dimensions embedded in policy. Policy meanings are shaped by material conditions on the ground as well as the willingness of educational participants to implement policy. In other words, policy meanings manifest at the interface between text and practice, rather than prior to practice.

Following McLaughlan (1987: 174), the emphasis on implementation shifts the focus of policy from automatic transmission of policy into practice, to a process of bargaining and negotiation between various local, regional and national actors. McLaughlan suggests that bureaucrats responsible for implementation will give their own meanings and interpretations to the intended policies which could change or even subvert the policy maker's original intentions (1987: 174). Sabatier advances three preconditions that are necessary to maximise successful implementation. These are: 1) the commitment of implementing officials, 2) the political and social support of interest groups and 3) the capacity of the policy makers to "structure coherently and legally the implementation process in anticipation of the political and economic pressures from street bureaucrats and targeted interest groups" (Sabatier 1986: 23). These implementation criteria point to the inter- and intra-organisational context and to the external world on which policy is expected to impact (De Clerq 1997: 147).

Thus, an analysis of policy must examine the extent to which policy has incorporated the exigencies of the terrain of implementation. Elmore (1980) argues that policy which is not conceptualised in terms of the implementation dimension is top-down and bureaucratic. The top-down policy method adheres to what he calls a forward mapping approach (Elmore 1980: 605), i.e. policy that is strong on vision, intentions and normative statements. He contends that policy designed in this manner can never be sufficiently rooted in the dynamics on the ground. It produces vague recommendations which are ambiguous and in conflict with one another (Elmore 1980: 28). Elmore is of the view that the best way to approach policy formulation is to conceptualise it in terms of the backward mapping approach which he defines thus:

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[33]. The political model is a pivotal component of critical policy sociology.

> ... backward reasoning from the individual and organisational choices that are the hub of the problem to which policy is addressed, to the rules, procedures and structures that have the closest proximity to those choices, to the policy instruments available to affect those things, and hence to feasible policy objectives (1981: 109).

For Elmore a backward mapping approach starts with the lowest level of the education system in order to generate policy which takes implementation conditions on the ground into consideration. De Clerq points out that such an approach "back up through the structure of implementing agencies with two questions: what is the ability of this unit to affect the behaviour that is the target of the policy, and what resources does the unit require to have that effect?" (De Clerq 1997: 148). This approach therefore argues for a conception of policy making which takes implementation seriously because of the assumption that an understanding of this level maximises one's ability to influence it. Fullan argues that "implementation is a process of policy clarification and is less about putting predefined policy into action than about further policy" (1989: 79).

Thus, critical policy sociologists favour a conception of the policy making process that is an interactive, dynamic and contradictory political process[34]. They oppose the linear view that emphasises a separation between formulation and implementation. Rather, they view policy as constantly formulated and reformulated subject to interaction at various stages by key policy participants and stakeholders. Policy is thus fundamentally a socio-political practice over which groups with different interests struggle and attempt to give it meaning.

Bowe and Ball (1992: 19) advance a way of analysing policy within context in order to understand the manner in which policy is formulated. They envisage three primary policy contexts, each consisting of a number of areas of influence, some private and some public (Bowe and Ball 1992: 19). Firstly, *the context of influence* refers to the arena where public policy is normally initiated and where policy discourses are constructed. This is the arena where interested parties and key stakeholders struggle over the definition and social purposes of education. The private arena is constituted by social networks around political parties, in and around government, and in and around the legislative process (1992: 20). The more formal public arenas which have an impact on the context of influence are: representative groups, voluntary associations, ideological think-tanks and the media. As lobbiers for certain causes and shapers of public opinion many organised civic groups have an impact on the outcomes of the policy process by bringing certain debates into the public domain. They often represent the more organised sections of civil society. Their vocal protestations and closeness to the popular media give their views public profile, while the demands for equity of the less well-organised and poor sections of the population become marginalised.

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[34]. Bowe and Ball (1992: 19) uses the term 'continuous policy cycle' to refer to this interactionist conception. They emphasise that institutional practices are engaged in 'policy recontextualisation', in order to refer to the new shades of meaning given to policy in practice.

The second policy context is *the context of policy text production* (1992: 20). Bowe and Ball suggest that policy "is normally articulated in the language of the general public good" (1992: 20) which often disguises its lack of clarity and internal coherence. Policy texts could be legal government legislation contained in Acts and White Papers. They could also take less formal forms such as commentaries by the Education Ministry to clarify policy, speeches by ministers, politicians and bureaucrats and official video presentations. Bowe and Ball contend that these texts might not be internally coherent or clear. Policy can often be contradictory. This could lead to misunderstanding and willful misreading. Thus, in order to derive an analysis of policy one would have to read texts in relation to time and the particular site of its production (Bowe and Ball 1992:21). Bowe and Ball suggest that intertextuality is important in understanding specific policy. This refers to the necessity of reading specific policy against the broad range of all areas of educational policy and broader state policy in areas such as economic policy, social welfare policy, trade policy and health policy.

The third policy context suggested by Bowe and Ball (1992: 21) is referred to as *the context of practice*. What is of relevance here is that policy is not simply received and implemented in practice, but is subject to interpretation and then 'recreated'. As I stated above with regard to a backward mapping approach, the context of practice allows different levels of the education system to have different interpretations of policy. Policy meaning cannot be controlled. The construction of policy meanings and interpretations is part of struggles within civil society. An analysis of education policy must also focus on the processes within practice that shape policy.

This section featured a discussion of the nature of education policy making and its impact on the eventual policy meanings favoured in policy legislation by the state. The argument was made that the policy making process has a fundamental impact on policy. Drawing on the critical policy sociology tradition, I support the view that the policy making process is complex and interactive. Contested vigorously by groups in civil society with a view to securing specific interests and commitments, policy is always the subject of negotiation and compromise. Understanding the various contexts in which policy is made is thus crucial. My conceptualisation of policy takes into account the way in which implementation factors on the ground are incorporated. While policy represents a normative or ideal vision (forward mapping) of what the state hopes to achieve in the public domain, and while the outcomes of policy are uneven across different contexts, successful implementation demands that policy be rooted within a backward mapping approach.

2.7 Education, Equality and Development

As I indicated throughout this chapter, the issue that stands at the centre of this thesis is the particular conceptualisation of the equality / development relationship that undergirds education policy. All the theoretical issues I touched on in this literature review, individually as well as the sum of its parts, have ultimately to be considered in relation to the way in which they give expression to the relationship between equality and development. Thus, in this section I advance an understanding of how these concepts are related to each other within the contemporary context or to what I referred to earlier as a 'context grounded' conceptualisation[35] of education and development. My analysis of education policy in this thesis is essentially an attempt at clarifying the specific conceptualisation of the equality and development relationship that underpins education policy in the first few years of the South African transition.

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[35]. See the earlier section on 'education and development in context' (para 2.2) for an explanation of the need to conceptualise equality within the contemporary neo-liberal context. This is a dimension which many theorists fail to incorporate into their theorisation.

Theoretical debate in Education and Development historiography has been undergirded by specific expressions of the conceptual relationship between social equality on the one hand, and economic development and growth on the other. This relationship had varied and contesting expressions over the last fifty years which were contingent on the interplay of specific contextual, ideological and political forces. The demand for social equality[36] is rooted in the enduring condition of poverty, underdevelopment and inequality in the south. Indices of poverty show that despite decades of 'developmentalism' the situation in LDCs and especially in Africa has deteriorated. The demand for equality thus remains pervasive. Equality discourses advocate the establishment of a socio-political and economic environment that will equalise social provision. It aims to provide a minimally acceptable level and quality of social services such as health, welfare and education to all people, which will give people an adequate basis to exercise their 'right' to education. The attainment of equality of outcome ought therefore to be a conceptual feature of socio-economic development policy. This view is distinct from and goes beyond the notion of formal equality or equality of opportunity which does not guarantee equality of outcome.

Education is viewed as one of the principal means through which inequalities in society can be redressed. Debates have raged around how education ought to give expression to the pursuit of societal advancement. Stressing equality in education has often translated into the increase of access to education. A high percentage of children of school age not attending school has been taken as an indication of a country's parlous state of development. Equalisation thus meant putting these children into school. The quality dimension of such schooling was often neglected. A narrow academic curriculum, often a third rate version of that provided for more privileged sectors, contributed to the inappropriateness of schooling. It also contributed to the phenomenon of the educated unemployed found in many LDCs. Equality-led education discourse had very few linkages with economic growth.

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[36]. I want to avoid the mistake of using equity and equality interchangeably. The two concepts, although allied to each other, denote different issues. Equity refers to processes and policies which institutions embark on in order to achieve equality. For example, affirmative action might be regarded as a short-term measure to achieve equality in access to universities. A previously disadvantaged group would thus receive positive discrimination in order to facilitate their equal participation in society. A wide-ranging philosophical debate exists around the meaning of equality. I concur with the view that equality does not imply sameness or that everyone in society should enjoy the same material status. Equality refers to the existence of equal access to opportunity and material goods which make it possible for everyone to attain similar outcomes. These outcomes, however, are not predetemined by equal access. Individual effort is an important determinant of outcomes. Thus, an equity sensitive conception of policy would have as its objective the provision of equal opportunities and material conditions necessary for the attainment of equality. See Maphai (1994), Ackerman (1994) and Jonathan (1997) for discussion on the distinction between equity and equality.

A policy environment that is dominated by the economic development and growth dimension has as its fundamental concern the promotion of a country's economic development[37]. It argues that the elimination of inequality is predicated upon a strong economy. The equalisation of education and other social services will only develop on the back of a strong economy. A development-led policy perspective has two broad implications for education policy: first, the education budget is reduced, and second, closer linkages are sought between education and economic growth. With regard to the reduced educational budget, equalisation within the education sector would be compromised. Regarding the link between education and the economy, a narrow focus on producing personpower to service a country's economic growth would predominate. The school curriculum would be shaped around notions such as vocational education and education for rural sustainability. This underlines the centrality of 'appropriate education' in development-dominated discourses.

I challenge the view that education policy ought to be dominated by either equality or development. Rather, I will provide an argument that factors in both dimensions. The way to avoid a potentially intractable conceptualisation is to set it up as a relationship governed by perpetual tension which gets mediated by political and ideological contestation in particular material contexts. I will base my arguments on the nascent work that has been done on this issue in South Africa.

The international educational literature has recently questioned why issues of equality have become marginalised in policy discourse (see Secada 1989, Apple 1989 and Campbell 1989). The main reason proffered is that the neo-liberal age's preference for a shrinking state has led to greater emphasis on efficiency and cost-effectiveness (Apple

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[37]. The term 'development' as it is used in this conceptual relationship refers to capitalist economic development and growth. Some theorists use development and growth interchangeably, but I prefer, following Badat (1997) and Wolpe (1992), to use the term development. This differs from another usage of the term in this thesis. Outside of the equality / development conceptual context I use the term development to refer more generically to broader socio-economic and political development.

1989: 9). According to Apple, equality has been redefined in what he terms the 'conservative restoration' in the 1990s to mean the "guaranteeing of individual choice under the conditions of a free market" (1989: 9). This disturbing shift has led the 'British Journal of Sociology of Education' (1986) to publish a special edition entitled 'Whatever happened to inequality?' with the view of reinserting equality into the policy discourse.

The equality / development debate became prominent in South Africa during the 1990s in the context of the democratic movement's challenge to translate protest rhetoric into policy language, and more recently in state policy making in the post apartheid era. Important work, brought together in a collection entitled 'Changing by Degrees: Equity Issues in South African Tertiary Education' (1994), was presented at a colloquium in 1993 that focused on equity in higher education. The colloquium discussed issues such as excellence, quality, redistributive development and affirmative action in the transformation of the higher education sector[38]. The colloquium highlighted contend conceptualisations of the equality and development relationship which underpin education policy and pointed to the need for greater theoretical work on the issue.

Badat (1997) provides a useful starting point for deriving a more satisfactory understanding of the equality / development relationship. He is concerned to develop a view of overall socioeconomic and educational development which is able to redress the fundamental inequalities in society. He holds the view that education policy which allows either equality or development to predominate does not provide a suitable resolution to the problem. On the one hand, the development angle prefers a conception of education which targets economic growth. Less money is thus available for educational reconstruction, while the production of human resources to facilitate growth is very strong in determining curriculum objectives. Issues such as excellence, quality, skills and competitiveness are stressed, while broader curriculum objectives such as democratic citizenship and critical thinking are downplayed. This conception holds that economic development will lead to greater social equality (Colclough 1991: 6). This however is far from evident. While an economic development driven policy framework might increase living standards for some, evidence gleaned from countries in the south indicates that it leads to greater inequality for the majority of citizens[39]. Badat comments that education on this conception has a purely instrumental role in facilitating economic growth at the expense of achieving greater equality (Badat 1997: 27).

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[38]. See Ramphele (1994) for the key issues that surrounds the debate on equity in higher education and Maphai (1994) for a philosophical consideration of affirmative action in SA.

On the other hand, Badat cautions against adopting a policy conception that is dominated by equality. This position, he believes, fails to pose adequate questions about the link between educational redress and broader economic, political and social development (1997: 24). Equality-based policies are usually abstracted from the contextual conditions in which they are applied. It also implies the existence of limitless resources. This conception is consonant with the view advanced in the post war period by modernisation theory that educational equality is the key to transforming both the education system and the economy. In other words, educational change will bring about socioeconomic development. This position also advances an internally homogenous picture of equality which obfuscates the existence of different kinds of equality such as race, class and gender. In a context of limited resources very difficult choices and tradeoffs have to be made among these different kinds of equality. Choosing to equalise in one area could lead to an increase in inequality in the other dimensions. For example, equalising in the area of race could lead to greater class inequalities. Most pertinently, an equality driven conception of education policy neglects to incorporate an appropriate context-bounded understanding of overall socioeconomic development.

Badat suggests that "the way out of this impasse appears to require an important conceptual shift and a fundamentally different point of departure for education policy formulation" (1997: 27). He asserts that the competing claims of equality and development should be recognised. Failure to do this may neither advance social equality nor economic, social and political development (1997:29). Drawing on Wallestein (1991) and Wolpe (1992), Badat advances the view that these two concepts stand in a relationship of perpetual tension. The challenge for education policy formulation is to "find a path which to some extent satisfies both demands as far as existing conditions permit" (1997:29). Education policy thus ultimately ought to balance the opposing demands made on it by equality and development. Badat contends that a viable education and training system has "to ultimately balance equality policies with economic policies" (1997: 29).

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[39]. Between 1980 and 1990 private consumption dropped in 81 percent of the world's least developed countries, public expenditure per capita dropped by 63 percent. Most of these countries implemented structural adjustment programmes (in Graham-Brown 1991:13-14).

Let me now turn briefly to outlining two positions[40] which address the pertinent issues, but could be regarded as suffering from simplifying manoeuvres and ought therefore to be avoided. Vally (1997a and 1997b) presents a compelling anti-capitalist view by arguing that equality ought to remain the conceptual pivot of transformation. Capitalism is for him not a viable option in securing equality. He regards equality as the overriding principle in terms of which education policy ought to be framed. Consequently, he is very sceptical about the predominance of the development discourse that emphasises the market economy, competitiveness and skills development. By favouring equality, Vally's position is limiting in that he views economic development and growth as being contingent on equality (1997a: 40-41). Thus, as a simplifying manoeuvre, this position fails to respond positively to the challenge to keep the two concepts in tension.

Kraak, in turn, advances a social democratic alternative to economic restructuring which accepts that social reform for equality should take place within the confines of capitalism. Kraak supports the notion that South Africa should develop an economic system that can compete internationally and an education and training system that can facilitate economic growth. He supports a supply-side perspective of restructuring skills development (1997:76). This means that the state would provide a regulatory framework which would aim at introducing complementary policies to enhance skills development in the country[41]. Some of the supply-side measures are: being proactive in terms of creating new skill demands, long-term planning of skill priorities, upgrading the trainer / provider market, and state, labour and corporate partnerships. According to Kraak supply-side restructuring goes beyond the short-termism of the market. It incorporates the need to counterbalance the market economy with the concerns to lay solid foundations for broader socioeconomic change. Thus, on this conception, the market economy is counterbalanced by state regulation which secures the necessary tension between equality and development.

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[40]. These two positions have arisen in a stimulating debate between Vally (1997a and 1997b) and Kraak (1997) in the journal 'The South African Labour Bulletin'.

[41]. A supply-side framework can be distinguished from a demand-side perspective. The latter refers to a conception of economic organisation and skills development that is driven by what the market requires. It is argued that this perspective only encourages skills upgrading if it leads to direct economic competitiveness and an increase in profits.

I have problems with Kraak's understanding of the functioning of capitalism in a global context and his optimism over state regulation. The new economic order is concerned precisely with deregulation and the removal of state control. Kraak fails to advance an adequate account of how the market functions and under which conditions state regulation of skills development will work. Supply-side measures are not necessarily received favourably by the market despite the best intentions of policy makers. Kraak's conceptualisation of education and training, I would argue, veers in the direction of being dominated by a concern for economic development, and thus could also be said to suffer from a simplifying manoeuvre, i.e. one that favours development and growth at the expense of equality.

What is missing in the above conceptualisations of equality and development is the manner in which the current context mediates the conceptualisation. While the idea of keeping the two concepts in tension is a theoretical advance, I believe that the forces of globalisation would tend to tip the scales in favour of development. Education and broader public policy are constructed in an environment which is not conducive to equality. It is thus extremely difficult to maintain the tension. Equality is always in an underdog position. An analysis of public policy must thus focus on the way in which equality is marginalised within the current global context.

Subotzky (1997) provides a useful conceptualisation of the equality / development tension which, unlike Kraak, takes the negative impact of the global context into account. He starts by raising three interrelated points around globalisation. That is, the neo-liberal ideological underpinnings of the global political economy, the implications of globalisation on macro economic and education policy, and the possibility of developing a complementary alternative to the seemingly inevitable thrust towards a world order based on a neo-liberal consensus[42]. Subotzky argues that while globalisation lends vigorous support to a global competitiveness development path (development), a redistibutive development path (equality) has to emerge to bring on board a unified development strategy.

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[42]. I provided an account of the influence of globalisation on education policy earlier in this chapter which should be read as complementary to Subotzky's framework.

Drawing on Smythe's notion of 'settlement', Subotzky shows how a specific development climate comes to settle in any context. A settlement is defined as

> ... an unstable truce between social forces which define a historically specific relationship of state and civil society. Such political relationships manifest as a distinctive framework for public policy. Settlements are contested and contradictory, but persist for a time, giving a period of history a particular qualitative character[43]. When this breaks down, a crisis emerges in which social forces struggle to define a new social order. Conflict is intensified and issues are debated and contested until a new settlement arises - a new pattern of social forms and boundaries (Smythe 1995: 5).

Subotzky argues that the starting point to insert equality is to focus on the underlying contradictions that are inherent in globalisation. These contradictions emerge in the battle over defining the new settlement which according to Subotzky should follow a "complementary development path which seeks to accommodate the inherent tensions between global and reconstructive concerns" (Subotzky 1997: 5). He favours a strong state role in constructing this path, but which avoids the pitfalls of bureaucracy and authoritarianism (Subotzky 1997: 6).

Subotzky's conception is useful because it places the global context at the centre of the shaping of policy which acts as a diffuse social movement that pervades the entire policy terrain. Education policy ought thus to be understood in terms of the interaction between national and regional forces on the one hand and global influences on the other. In such a context equality-driven policy is undermined by the development angle that dominates the global development path.

Subotzky presents a viable starting point in terms of which the neo-liberal influences of globalisation can be challenged. Contestation of the settlement, I believe, has to commence from making a distinction between features of globalisation in terms of which nations have to organise their economies, and the current neo-liberal push to impose market values over all political values and social values, what Soros (1998: xxvii) refers to as 'market fundamentalism'. As a feature of globalisation per se, deregulation cannot be reversed, although it could be modified if there is a strong collective will among major industrial nations, and the key market players (Robertson 1992 and Soros 1998). Nations, however, have no choice but to participate in the global economy which means they have to embark on trade liberalisation and export-led growth. Neo-liberal politics and its emphasis on the triumph of the market over state control and decision-making is a feature of the current political climate. In order to establish a complementary development path neo-liberalism has to be challenged by a discourse of equality that would seek to establish a regulatory framework to control the unfettered operation of the market. The equality / development tension can only be attained if there is an understanding of the way in which globalisation tips the scale in favour of development and economic growth. This tension (what Subotzky refers to as 'complementarity') does not exist by itself but is the subject of contestation and struggle in civil society by groups with different interests. These contests are essentially over defining the meaning of public policy. Thus, among many other pressures, policy must be conceptualised as a response to neo-liberal influences. Failing to respond to this would result in the continued domination of development over equality which would in turn disallow the emergence of a redistributive development path to underpin public policy.

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[43]. I contend that the period April 1994 to March 1997 represents a settlement similar to the one defined above by Smythe and therefore justifies the choice of this period as having a very specific policy climate to the period that preceded it and the one that followed after mid-1997.

2.8 Conclusion

I have attempted to develop a conceptual framework that would provide an analytical basis for my analysis of contemporary education policy in South Africa. I have advanced an understanding of education policy that responds to the need to develop an education system that will serve the interests of the majority of the educationally marginalised. Educational provision founded on social equality, in terms of which the necessary material conditions and circumstances would obtain, is a primary criterion in educational development.

The emphasis on contextualising this project is driven by the desire to take on board the relatively difficult context in which development occurs in the south at the end of the twentieth century. While the 'contextual' imposes a set of conditions that challenges the triumphalist assumptions that are embedded in an equality-driven path, it also puts pressure on unprincipled pragmatic solutions. I argued that the contextual provides the site for public engagement over the nature and content of policy. An understanding of education based on human rights, I believe, should always trump any short-term 'pragmatic realist' conception of education policy.

The extensive focus on the historiography of Education and Development reveals the interplay between educational theorising on the one hand and the shifting historical trajectory on the other hand. It reveals the manner in which certain theoretical frameworks have endured, despite criticism, to specifically inform the work of the influential international development agencies.

One of the main arguments I pursue in this thesis derives from the link between context and conceptualisation. I used the work of Ginsberg et al. (1990) to provide a conceptual location for the link between education and globalisation. Their world system level analysis considers the extent to which global forces impact on national policy making. I described the impact of globalisation on economic restructuring in the south and the consequences for education. I came to the conclusion that globalisation acts as a 'diffusive social movement' which pervades policy making and from which no nation can escape. Globalisation interacts with national forces in specific educational subsectors to give rise to policy in these subsectors. The specific nature of the dynamics embedded in each subsector at global, national and regional level plays a major role in determining policy. The role of the state is regarded as fundamental in education policy. The state is subjected to contestation by divergent social forces intent on imprinting their agenda on state policy. This dynamic is important in understanding policy. Understanding the nature of the education policy making process is equally crucial in an analysis of education policy.

I argued that the equality / development relationship stands at the centre of education policy analysis. I favour a conception of this relationship which holds the two concepts in tension. This tension is difficult to maintain in the light of the overwhelming influence of globalisation on public and education policy. Policy analysis has to incorporate the extent to which globalisation favours development over equality.

Chapter Three: Education policy in South Africa in historical context

3.1 Introduction

I situate contemporary education policy development in this chapter within social and historical context, in consonance with my view that context should be central to debates about education and development. The purpose of this contextual chapter is to specify the manner in which the conceptual terrain of contemporary education policy has been constructed and delineated by apartheid education[44]. The main question I pose in this chapter is; how has apartheid education delineated education policy in the post apartheid period? The question can only adequately be responded to if educational development in South Africa is understood within its unfolding socio-historical context over at least the last hundred years.

This exercise has two interrelated aspects. The first requires an overview of the main policies and practices that constituted apartheid education and which spawned the existing legacy of inequality in education. Education policy, for it to be efficacious in targeting education reconstruction, should be conceptualised in response to the specificity of this legacy. The second aspect requires an attempt to understand the discursive underpinnings of education policy: the contesting policy discourses which have influenced current education policy. In providing the historical context of education policy I focus on policy continuity and discontinuity between pre and post 1994 periods, highlighting those aspects of education policy that changed from one period to another and those aspects that persisted, albeit in a different form.

The chapter consists of four chronological sections reflecting the historical development of South Africa. Firstly, I discuss the origins of racially segregated schooling before the advent of apartheid in 1948. I argue that the emerging racial pattern of schooling has to be understood in relation to the peculiar form of industrialisation that started in the 1870s.

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[44]. While this chapter is broadly concerned with South African education, the focus tends to privilege schooling. Thus, the historical context of schooling policy and practice emerge more prominently in this chapter.

Secondly, I focus on the shifting trajectory of apartheid education between 1954 and 1970 in order to show how this affected the provision of formal schooling for blacks. It was in this period that the vastly unequal legacy of apartheid education was developed and consolidated. Thirdly, I concentrate on the decades of the 1970s and 1980s in order to show the interaction between educational reformism and resistance against the backdrop of the state's unsuccessful attempts to reform apartheid in response to what has been described as an 'organic crisis' inherent in the structure of South African society. This period witnessed the emergence of a contest between liberal and radical discourses over the nature of education in a future South Africa. Finally, I discuss the nature of education policy that emerged during 1990 and 1994. I argue that the differences between policy of the democratic movement on the one hand and the apartheid state on the other hand, can best be understood as part of the politics of negotiation that characterised the period. However, I argue that a degree of policy convergence between these two policy discourses had become visible by the time of the election in April 1994, and that this convergence has to be taken into account in an analysis of education policy after the election.

At this point a caveat is necessary in order to outline the analytical approach I utilise in this chapter. I follow a 'political economy' analytical approach[45] which concentrates on relating educational development to the economic and socio-political contours of South African history. I attempt to show the connection between the nature of capitalist accumulation over the last hundred years and the concomitant reproduction of social relations, in which education played an important role, along racial lines. While avoiding a deterministic reading of education as a 'mirror' of economic development, a political economy approach provides a framework to understand the educational developments and changes against the backdrop of broader societal processes. An important argument that I pursue is that apartheid education ought to be understood in relation to strategies of reformism adopted by the state throughout the period of apartheid rule. The development of education ought not to be seen simplistically as the outcome of an undifferentiated policy which sought to subjugate blacks according to a predefined racial ideology. While race is the most visible manifestation of an unequal system, apartheid education developed out of the fluid context of a changing political economy during the 1930s and 1940s. It continued to develop from the 1950s into the late 1980s in relation to this shifting political economy. One of the main arguments I make in this thesis is that education policy during mid-1994 and mid-1997 ought to be understood fundamentally as having been constituted within the emerging political economy of the period (see para 4.3).

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[45]. Political economy analyses of education have been practiced by left-wing academics since the late 1970s as part of the broader shift to revisionism in South African historiography. Aimed as a critique against the liberal interpretation of the role of education within apartheid which stresses race as a central analytical category (Cross 1992: 29), political economy analysis, inspired by a Marxist theoretical orientation, stresses the relationship between race and class in giving shape to education in a racial capitalist society (Kallaway 1990: 30-33). For examples of analyses based on this approach see Nasson (1990), Kallaway (1990 and 1984), Molteno (1984), Cross and Chisholm (1990), Hyslop (1988) and Unterhalter (1992).

3.2 The political economy of racial segregation in education

While exogenous influence in South Africa started with the colonial occupation of the Cape by the Dutch East Indies Company in 1652 and was displaced by British colonial control in 1806 (Christie 1985: 29-34), the basis of racial segregation in education is generally regarded to have been laid after the discovery of minerals in about 1870 (Cross and Chisholm 1990: 45, Molteno 1984: 59-61, Kallaway 1984: 9-12). This is not to downplay the significance of colonial education provided by the missionaries. In fact, a history of South African education would be regarded as incomplete if it did not feature a discussion of the nature of colonial education. This would have to include inter alia: an illustration of the symbiotic relationship between colonial conquest, merchant activity and missionary education; the reluctant stance of indigenous people toward formal education; the creation of a black elite and its subsequent role in the social dislocation of traditional communities, and the tardy growth of education for blacks.

Colonial education only received serious attention from the British government by the mid-nineteenth century. Schooling was regarded as part of the 'pacification' of the indigenous population. Schooling aided the final push to stop black resistance on South Africa's eastern frontier[46]. A recurring theme in the historiography of South African education revolves around the nature of the curriculum. Already by the late seventeenth century the link between the form of missionary education and the social destiny of blacks had been a primary preoccupation of colonial policy makers and the Christian missions. Concern was shown about whether the form of curriculum was commensurate with the social station of black people. It was feared that an academic education would prepare blacks for a future social world to which they would be unable to gain entry. There was consternation that the educated blacks' frustrated expectations might give rise to resentment and popular resistance (see Molteno 1984: 53-55 and Thompson 1981: 34). This theme re-emerges throughout South Africa's educational development under headings such as 'adapted education' in the 1920s, 'manpower planning' in the 1980s, and 'vocational education' in the 1990s.

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[46]. The history of colonial education before 1880 is poorly documented. There is a paucity of research on the subject. For the most recent analyses on colonial education see Molteno (1984), Christie (1985) and Keto (1990).

The emergence of racially segregated schooling is tied to the advent of industrialisation in the 1880s. The specific nature of mining from 1880 onwards had a deep imprint on the racial division of labour and the emerging social, economic and political institutions of South Africa. By 1890 monopoly capitalism took almost complete control of the mining industry (Cross and Chisholm 1990: 45). The big mining companies, due to the deep-level nature of mining, the low grade of gold ore and the fixed world gold price, had to make enormous capital outlays to turn mining into a profitable venture (Worden 1994: 38). The cost of mining was increased by having to employ expensive, but necessary, imported white skilled labour from Australia, the United States of America and Britain. The only way in which mining's profitability could be ensured was to use black labour to do the unskilled work at very repressed wage rates (Worden 1994: 40). The migrant labour system whereby labourers lived for most of the year on compounds and returned home to their families in the rural areas for a few weeks played a big part in enabling the mining industry to pay these low wages. Migrant workers could be paid low wages that covered the living costs of single persons who lived in decrepit compounds next to the mines, while the cost of their families' upkeep was met by the rural subsistence economies (Worden 1994: 40). This in effect meant that the mining industry's profitability was subsidised by these rural peasantl economies.

Thus, from the outset a rigid racial division of labour was established in mining towns. Semi-proletarianised black workers did the unskilled labour. Their migrant status prevented the development of a strong political consciousness among them. The skilled work was done by fully proletarianised white workers who marshalled their firm political consciousness, brought from the foreign contexts from which they came, to protect their status (Cross and Chisholm 1990: 46). The increasing proletarianisation of impoverished rural Afrikaners to the urban areas after the South African War in 1902 gave rise to the so-called poor white problem. These whites were not employed in unskilled jobs because the profitability of mining depended on the employment of cheap black labour. Being fully proletarianised these whites would have had to be employed at higher rates. However, to address the unemployment problem among urban poor whites, the state began to intervene in order to secure "preferential treatment for whites in employment outside the mining industry" (Cross and Chisholm 1990: 46). The notorious job colour bars, in reference to legislation passed in 1924, allocated unemployed working class whites to privileged, supervisory places in the racial division of labour (Cross and Chisholm 1990: 49). Social formation in South Africa, including its politics, urban geography, economic and social relations, and educational institutions emerged roughly along the racial lines akin to the rigid racial employment patterns on the mines (see Beinart 1994: 59-82). Racial segregation was given political impetus with the establishment of a unified state in 1910. The Union of South Africa consolidated the four provinces into one country under the British in which Afrikaners and the English were constitutionally regarded as equal citizens. Black South Africans, however, remained inferior colonial subjects under the British crown.

The term 'school colour bars', coined by Cross and Chisholm (1990: 44) aptly captures the relationship between the racially segregated development of education and the emerging labour patterns in South Africa. A racially segregated schooling system began to take shape after the South African War in 1902. A number of legislative enactments were brought into operation which provided white children with free and compulsory education (Hartshorne 1992: 24-25, Christie 1985:49). Between 1905 and 1908 various School Acts were legislated in the Cape, Transvaal and the Orange Free State that made provision for "institutionalized racial separation in education" (Cross and Chisholm 1990:48). Extending compulsory schooling for whites was meant to cultivate a common white racial identity in support of the general ethos of the unfolding capitalist ideology (Worden 1994 and Cross and Chisholm 1990: 48). There were gallant attempts by Afrikaners to resist these public schools because of fearing that they would threaten their language, culture and religious values. They set up many alternative schools based on the Christian National Education philosophy which later came to play a crucial role in apartheid education (Christie 1985: 50). Paterson (1992), while arguing that segregation in schooling in the Cape Province cannot be tied simplistically to industrialisation, shows how multiracial mission schools began to segregate. The white children from mainly impoverished communities left to attend the whites-only state schools that were established from the first decade of the twentieth century onwards (see Paterson 1993: 113-134).

Whereas compulsory and free formal school access for white children was placed on a firm footing early on in the twentieth century, black schooling remained under missionary control and was neither free nor compulsory. The growth of schooling for blacks was slow. By 1940 less than a quarter of all black children between the ages of six and sixteen were in school. Per capita spending was forty times less for black children compared to white children (Molteno 1984: 69). The slow growth in black schooling can be attributed to the fact that unskilled labour did not require the state and mining bosses to invest in black education. There was almost no employment demand for 'schooled' blacks. The compliance of black workers could be achieved more effectively through repressive institutions such as the migrant labour system, labour compounds, pass laws and restrictions on movement. Molteno concludes that the "conditions which had led to the introduction of mass schooling in the advanced capitalist societies ... have not arisen yet in South Africa" (1984: 71).

Those blacks who attended mission schools were exposed to a curriculum that stressed elementary arithmetic and communication. The inculcation of habits such as cleanliness, obedience, punctuality and self-discipline based on religious and moral values made up a prominent component of the curriculum and ethos of the schools. The schools placed a strong emphasis on manual labour and industrial training. Mission schools were put under the oversight of the provinces, but state funding remained minimal. Mission schools were mostly in rural areas and often had only one classroom and one poorly paid teacher (Krige 1996: 33). Not unexpectedly, the general quality of mission schools was very low (Hartshorne 1992: 24-27).

The official education policy discourse that underpinned black schooling began to crystallise by the turn of the century. The state-appointed South African Native Affairs Commission, suggested in 1905 that black education should be kept inferior, that it had to include manual labour and that parents had to pay fees (Cross and Chisholm 1990:

47). The idea that Africans had to be 'assisted' gradually into a way of life different from whites became prominent. That schooling had a bearing on the way capitalist relations emerged is illustrated by the view that it had to play a role in making blacks amenable to wage labour. It also had to contribute to the creation of wants among blacks in order to expand capitalist markets (Molteno 1984: 59-63). The early thinking around the aims of black education was saturated with racial paternalism and the need to secure efficient and compliant workers for the economy. Education was meant to inspire blacks with an unquestioning sense of social place as inferior subjects in the unfolding racial hierarchy that had begun to constitute public life in South Africa.

By about the mid-1920s the state had begun to question the efficacy of mission schools. This was mainly due to the perception that the missions had failed to produce appropriately docile and labour oriented people. Mission schooling was regarded as too academic and a contributor to elevating blacks above their social station (Cross and Chisholm 1990: 48). An Interdepartmental Committee on Native Affairs commented in 1936 that the education of blacks in the past had been too humane (Molteno 1984: 73).

Criticism of the missions' approach to schooling led to a shift in thinking in state policy discourse which was characterised by the need to imbue black education with a scientific rationale (see Krige 1996: 34). A confluence of events in the 1920s led to the emergence of 'adapted education' as the prominent education philosophy for black people. The influential Phelp-Stokes Commission that visited South Africa from the USA with the brief of reassessing the role of education for Africans, advocated that education be modified to meet local needs and to develop a community consciousness (Krige 1996: 36). Ideas based on 'scientific racism', social Darwinism and eugenics were used to promote a paternalistic segregationist ideology of black schooling. The emerging discipline of social anthropology was appropriated to give prominence to the use of culture to justify ethnic and cultural separation in education. Culture had "become part of the legitimizing ideology for segregated schooling" (Cross and Chisholm 1990: 49).

Guided by a liberal philosophy of schooling, educational 'experts' and bureaucrats such as Loram, Rheinhalt-Jones and Brookes played a prominent role in applying the philosophy of adapted education to black education (Cross 1992: 18). Some of the ideas that they emphasised were: 1) to make academic and practical education equal in importance, 2) to encourage vocational education, and 3) to link education to rural reconstruction and village industries. Adapted education was meant to reflect infantilist perceptions about blacks such as their being in a 'state of child development' or 'arrested development' and that education be conceptualised in terms of their 'present stage of development' (Krige 1996: 41). One of the key issues that the ideologues of adapted education struggled with was the purpose and form of educating blacks to fit into the working class (Cross 1992: 16). Education policy discourse from the onset of mining capitalism until the 1950s when apartheid education was introduced, developed in response to the complex processes that made up industrialisation and the resulting racial segregation of all spheres of life. The hegemonic policy discourse should be read fundamentally as having arisen out of the need to establish a racially segregated education system that was congruent with the political economy of the period.

3.3 The introduction and development of apartheid education

While the racial foundations of education were laid around the turn of the twentieth century, mass education for blacks was only phased in after the introduction of apartheid in 1948. During the 1950s and 1960s the National Party (NP) introduced a number of laws that established and consolidated a racially differentiated mass education system. The key legislative enactments that shaped apartheid education were the Bantu Education Act of 1953, the University Extension Act of 1959, the Coloured Persons Education Act of 1963, the Indian Education Act of 1965 and the National Education Policy Act of 1967. The three issues that are crucial in understanding the nature and provision of apartheid education until about 1970 are: 1) the reasons for the introduction of apartheid education by the NP, 2) the fluid education policy trajectory that developed in relation to the reformism of apartheid during the period and 3) the ideological discourse that underpinned education.

During the mid-1930s, changes in South Africa's political economy gave rise to a number of features that were decisive in leading to the implementation of a mass schooling system for blacks. South Africa entered its second industrial revolution which was based on the diversification of the economy to include a growing manufacturing component. The concomitant increase in semiskilled jobs established the need for a more stable urban black workforce. Until then, cheap labour for the mines could be provided by the migrant labour system, the reproduction of which did not require an extensive role for schooling (Cross and Chisholm 1994: 49). The permanent urbanisation of many blacks occurred rapidly from the mid-1930s as a consequence of the impoverishment of the reserves in the rural areas. The urban black population increased by two thirds between 1936 and 1948 (Worden 1994: 61). Urbanisation was chaotic. Slum townships sprang up around the big cities without any adequate social infrastructure. Glaser (1989: 1-15) shows how the urban youth subculture that emerged in these townships threatened the stability of big cities. Crime levels increased and black nationalist politics began to mushroom. The conditions of social reproduction became threatened. Unsuccessful attempts to address the 'youth problem' were made by liberal-inclined institutions (Cross and Chisholm 1990: 52) who were intent on maintaining the social relations needed to service the needs of manufacturing companies. Mass schooling emerged as the new social reproduction strategy that would secure the required labour needs for the secondary industrialisation process, while serving at the same time as a mechanism through which to effect social discipline and control over the urban areas (Kallaway 1984, Molteno 1984 and Hyslop: 1998).

State mass schooling became particularly apposite when missionary education, wracked by financial crises and student rebellion (Kros 1993: 79), became ineffectual in addressing the changing social reproduction needs of the country. Through the Bantu Education Act passed in September 1953, the funding, administration and control of black education were removed from the missions and provincial authorities and placed under the centralised control of the Department of Bantu Education (Beinart 1994: 153). This provided the state with direct control over education, thereby enabling it more effectively to relate the provision of black education to social reproduction.

The rationale for the introduction of the policy of apartheid in 1948 is important in understanding the policy of mass education for blacks. The emergence of the ideology of Afrikaner Nationalism was a key dimension of white politics in the 1930s. Spurred on by their exclusion from economic power, a multi-class alliance of Afrikaner Nationalists, under the leadership of the Afrikaner middle class who galvanised nationalist sentiment through fervent ideological work (Cross and Chisholm 1994: 53), became the dominant group in white politics. At the level of political economy the NP's election victory in 1948 represented a vision of reestablishing the migrant labour system and bringing about urban social control (Hyslop 1988: 447 and Cross and Chisholm 1990: 53) in the wake of and in response to the collapse of the reserves, secondary industrialisation and urbanisation in the 1940s.

Hyslop argues that the NP followed an accommodationist interim position during the 1950s in order to secure social reproduction in the urban areas (Hyslop 1988: 448) before embarking on the 'grand apartheid' ideological vision according to which a number of ethnic homelands were established. This interim position had a direct bearing on the provision of black education in the urban centres. In order to secure the minimal conditions for social reproduction in terms of the growing secondary manufacturing industry, specifically the demand for urban black semiskilled labour, the state allowed major expansion of black housing in the urban areas which helped to stabilise the urban labour force (Hyslop 1988: 449). Rudimentary infrastructure, including schools, was laid on in towns such as Soweto and Orlando. Bantu education played a crucial role in securing the semiskilled labour force. In this regard Hyslop comments that "by bringing the bulk of urban African youth into a few years of basic schooling, Bantu Education provided a mechanism of social control which could be used to fight the rising tide of crime and political militancy, and at the same time generate a semiskilled workforce" (1988: 450). Cross and Chisholm suggest that "Bantu Education would restructure the conditions of social reproduction of the black working class and create conditions for stabilizing a black underclass of semiskilled labourers" (1990:56).

The numbers of black children attending school rose dramatically between 1953 and 1963 from 800 000 to 1, 800 000, mostly in urban areas and limited to the primary level. They attended on average four years of schooling which allowed them to acquire a functional level of literacy and numeracy that was necessary to do semiskilled work. State funding for black education was very limited, the main consequence of which was a low-level quality schooling. Double shifts and classes of up to sixty pupils were the order of the day (Hartshorne 1992: 38). Mass schooling performed the relatively uncomplicated task of socialising black children into subordinate positions in the racially structured economic and socio-political landscape that characterised the political economy of urban towns in the 1950s. The provision of schooling for urban blacks during the 1950s was part of an attempt by the state to differentiate the black urban labour force from the uneducated migrant labour force (Hyslop 1988, Unterhalter 1991: 56). This limited the growth of mass education for blacks to urban centres. This situation changed dramatically during the 1960s.

The shift in emphasis to the massive expansion of education in the rural areas where homelands were formed was caused by the state's success in disrupting the accommodationism of the 1950s that existed between the state and industry. Social reproduction was now delinked from demands by manufacturers for urban social reproduction. Having secured an urban black proletariat in the 1950s, the state moved towards a policy of urban containment and separate development. By the end of the 1950s the state became dominated by Prime Minister Verwoerd's rigid 'grand apartheid' ideological direction (Beinart 1994: 155-158). In line with the move towards separatism, blacks would now be treated as 'temporary sojourners' in the cities who ultimately had to be relocated to the homelands. The removal of blacks to the homelands was an effective strategy to crush the 'rights-demanding' urban black opposition that was active in the mid-1950s in opposing the racist apartheid policies (Unterhalter 1991: 59, Beinart 1994). The homeland strategy was implemented against the backdrop of massive foreign investment which heralded an unprecedented economic boom in the 1960s. The homelands policy brought fundamental change to South Africa's socio-political landscape. Between 1960 and 1983, 3,5 million people were relocated to the homelands which led the homelands' population to grow by seventy percent, while the black urban population fell during the 1960s (Worden 1994: 111). Numbers in the homelands were swelled by the expulsion of black labour tenants from white farms which, because of the mechanisation of agriculture, ceased to require large-scale farm labour (Hyslop 1988 and Worden 1994). Thus, apartheid reformism during the 1960s heralded the reversal of the flow of blacks to the cities. This was achieved through strict influx control and pass laws. The homeland system was an unsuccessful attempt on the part of the state to give political rights to blacks based on the construction of ethnicity (Beinart 1994: 150-157).

The state invested large sums of money in the homelands in order to operationalise its vision of separate development. Infrastructure such as roads, health clinics, railways and police stations were constructed, social services were provided and a black civil service was employed to run the bureaucracies. Chieftaincies were co-opted and paid by the state to provide political leadership. The homelands witnessed spectacular growth in the provision of education. Enrolments more than doubled between 1960 and 1975, all of which took place in the homelands. In this period the number of secondary school pupils increased tenfold. Government expenditure on black education increased eightfold, while per capita expenditure per black pupil in 1975 was four times as large as in 1960 (Unterhalter 1991: 58-59).

Hyslop argues that the expansion of education for blacks in the homelands should chiefly be attributed to the state's policy of having education operate as a form of influx control (Hyslop 1988: 456-457). The state closed down avenues for blacks without urban residential rights to enrol their children in urban schools, while it simultaneously provided expanded schooling in the homelands to 'force' families who valued education for their children out of the cities. All future secondary, technical and teacher education would now be offered only in the homelands. The 1959 University Extension Act laid the ground for the establishment of a number of ethnic universities in the homelands. Bantu education policy during the 1960s contributed to the emergence of ethnic separatism in conformity with Verwoerd's ideals of separate development. However, the long-term implications of separate development which eroded the social reproduction capacity of the urban areas to secure enough semiskilled labour to service the expanding urban manufacturing sector, had by the end of the 1960s created a new crisis for the social reproduction of labour. Urban industrial capital interests clashed directly with the policy of separatism. This heralded another decisive shift, precipitated by the changing political economy of the late 1960s, in the development of apartheid education after 1970.

The educational discourse that underpinned the state-provided mass education system from 1948 served to authenticate racial and ethnic differentiation. Christian Nation Education (CNE) provided the ideological framework in terms of which such differentiation was legitimised. The origin of CNE is to be found in the Afrikaner's resistance culture that developed before and after the South African War (1899-1902) in opposition to the anglicisation policies of the British. About 200 alternative schools were set up by Afrikaners after 1902 but most had closed down by 1910 (Christie 1985:174).

The philosophy of CNE was enacted in state policy after 1948 when the Afrikaner Nationalist dominated NP assumed political power. Documents such as the Eiselen Commission Report of 1951, the Bantu Education Act of 1953, the National Education Policy Act of 1967 and the Education and Training Bill of 1979 made key pronouncements on the meaning of, and the commitment to CNE in official education policy (see Kallaway 1990, Davies 1984 and Enslin 1984). In spite of the shifting nature of black education viz. the changing political economy which I describe in this chapter, the racial ideology of CNE was applied with relative uniformity from the 1950s until the 1980s. It played a profound role in shaping teacher training, the content of textbooks and the nature of pedagogy.

Racial differentiation as an aim of apartheid education is illustrated by the difference between the application of CNE to whites and to blacks. In this regard, Enslin asserts that CNE "purports to be a policy for white Afrikaans-speaking children, but it has had far-reaching consequences for the education of all children in South Africa" (1984: 139). CNE comprises an amalgamation of a conservative definition of 'Christian' which connotes Calvinist moral propriety and 'National' which refers exclusively to the Afrikaner volk. The use of CNE was intended to solidify among Afrikaners a racially exclusive ethnic identity in which the appropriation of language, culture, symbols and history played an important constitutive role. The schools and special programmes such as the Youth Preparedness Programmes and Veld Schools did ideological work in inculcating a racial/ethnic identity around concepts such as patriotism, love for 'fatherland' and military preparedness to face the black onslaught (Christie 1985: 175). White education was predicated upon a racially defined ideological framework aimed at sustaining the white racial superiority and privilege that was such a pivotal feature of apartheid.

The application of CNE by the ideologues of apartheid education was based on the notion of the cultural inferiority of blacks which was not dissimilar to the notion of adapted education propagated by liberals in the 1920s. Cultural inferiority formed the basis of the racial paternalism inherent in education policy. CNE regarded the education of blacks as the responsibility of white Afrikaners and as part of their sacred obligation to christianise blacks. Blacks had to be guided from their condition of cultural infancy (Enslin 1984: 140-141), but neither to share cultural equality with whites nor to move into their cultural world. Educational development, facilitated by the cultural guidance of whites, was to bring blacks into a "specific culture that was said to be the unique inheritance of the 'Bantu'" (Kallaway 1990: 39). Bantu Education policy asserted that the educational experience of blacks must not alienate them from their own culture and make them aspire to social and political rights on a par with whites (in Rose and Tunmer 1975)[47]. Over and above this political rationale for keeping blacks from attaining cultural and racial equality, education policy for blacks also had an economic rationale. Black education had to be adapted and made relevant to employment and work (in Rose and Tunmer 1975). In order to keep blacks locked within a separate cultural universe, their education was based on mother tongue education. Black education should neither be funded at the expense of white education, nor prepare blacks for equal participation in political, economic and social life. Securing compliance with these aims meant that black education must be organised and administered by whites (Enslin 1984: 140). As the hegemonic discourse of apartheid education, CNE[48] played a powerful role in the racial differentiation of education from the 1950s. It provided the ideological basis for the unfolding policy of apartheid education. The differentiated application of the CNE educational principles led to fundamentally different official ideological orientations and curriculum approaches for white and for black education. White education aimed to construct and sustain an identity of racial superiority, while black education was meant to inculcate cultural and racial inferiority. The ideological underpinnings of the racist CNE discourse must be understood against the background of the unfolding capitalist social relations that made up the changing South African political economy. The racial discourse which underpinned apartheid education played a key part in reproducing these social relations, especially the need for semiskilled labour in the urban areas and the generation of ethnic consciousness on which homeland citizenship was supposed to be based.

3.4 Organic crisis, education reform and resistance

The political consensus that sustained the grand apartheid vision of separatism in the ethnic homelands during the 1960s came under strain at the end of the decade. A closer alliance between the needs of industrial capital and a less purist component in the National Party had the effect of shifting state policy away from the urban exclusion of blacks towards addressing the reproduction needs of the urban industrial sector. This shift was triggered by the economic slump in 1968 which followed almost a decade of unparalleled growth. The boom years of the 1960s, while they provided the financial basis for the implementation of a grand separatist vision, laid the seeds for the economic crises that characterised South Africa during the 1970s and 1980s, and led the state to embark on a tenuous path of economic and social reform in the period.

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[47]. See Hartshorne (1992: 36-45) for a description of the manner in which the Bantu Education curriculum incorporated a 'culturally appropriate' focus on issues like tribal customs and laws, local Bantu legends and artefacts.

[48]. The doctrine Fundamental Pedagogics was an attempt by some Afrikaans university education departments to give CNE respectability by turning it into a science.

The economy grew during the 1960s on the basis of foreign investment, the expansion of mining and growth in agriculture. Profit in gold-mining soared dramatically and generated huge state revenue. Following a path of what Beinart calls 'economic nationalism' the state held monopoly control in heavy industries such as steel and the oil and armaments industry (Beinart 1994: 168-169). A key feature of the boom years that was to have a negative impact on the economy was the reliance on large scale importation of capital goods and technology (Beinart 1994 and Cross and Chisholm 1990: 590). Economic growth was stunted by the dependence on a small white market. The growth of black consumption was impeded by the exclusion of blacks from the urban areas. Attempts to create decentralised industries in the homelands to facilitate the growth of an industrial sector there failed dramatically (Stadler 1987: 94) Throughout the 1960s industrialists complained about the lack of semiskilled labour which was the direct consequence of Verwoerd's policy of separatism. Urban industrial capital required the expansion of a permanent urban black working class to address the increased demand for semiskilled jobs. While the country was still experiencing an economic boom the state could successfully manage and contain the contradictions in urban reproduction that separate development created. However, the sudden economic downturn of 1968 created a balance of payment crisis, rising debt and inflation. The economic crisis brought into sharp relief the limitation of confining black educational expansion to the homelands.

Liberal pressure was brought to bear on the NP's separatist dogmatism. An alliance between English and the growing Afrikaner monopoly capitalists pressurised the state into aligning its public and education policy in their interest, and which was represented by the robust pro-capitalist politics of the Progressive Federal Party, the official opposition throughout much of the 1970s and 1980s (Beinart 1994: 179-180). Moreover, the emergence of a more enlightened faction in the NP by the end of the 1960s had come to challenge and eventually displace the policy of separate development. Greater accommodation with the needs of monopoly capital became the undertow of apartheid reformism during the 1970s and 1980s. While the political ideology remained premised upon racial separatism, and while the homelands policy was still being pursued, state policy began to reflect "the long-term reality of the urban working class" (Hyslop 1988: 462).

The shift to urban social reproduction in terms of which the development of a fully proletarianised black working class in the cities would be facilitated, had two direct consequences on education policy and practice. The first one is the considerable expansion of secondary schooling in the urban areas which overrode the earlier approach of using education as a form of influx control (Hyslop 1988: 462 and Unterhalter 1991: 62-64). During 1975 and 1985 secondary school attendance grew tenfold with state expenditure for black education trebling (Unterhalter 1991: 63), placing great strain on existing school facilities. Thus, by the early 1970s the state had moved toward a more pragmatic position in permitting the growth of urban secondary schools in response to industry's labour needs (Hyslop 1990: 83).

The new schools that were built could not adequately accommodate the increasing numbers. Pupils thus attended overcrowded and under-resourced schools. This laid the basis for the enduring lack of educational quality in black schooling. While the quantitative expansion of schooling for blacks during the 1970s and 1980s was spectacular, the quality of education was very low (Hyslop 1990: 80). The inability of schooling to provide an adequate intellectual basis for gainful employment and upward mobility generated frustrated expectations among the youth about their education. Moreover, the economy's inability during this period to absorb the newly (under)educated served to undermine the value of schooling. This led to the observation that poor schooling quality and the consequent devaluing of schooling by blacks students, provided the basis for the popular discontent which propelled the student and youth uprisings of the 1970s and 1980s (see Bundy 1989: 206-217, Cross 1992: 201-203 and Hyslop 1990: 80-82). Hyslop comments that "the state's attempts to deal with the problems of labour supply and social control by expanding schools have often simply generated new grievances" (1990: 80).

The second manifestation of the policy shift to a more responsive approach to urban social reproduction is the preoccupation with technical or vocational education which became an enduring feature of policy discourse during the 1970s and 1980s, in spite of the state's continuing ideological commitment to racial differentiation in education. While race remained the rationale of the institutional organisation of schooling, i.e. whites and blacks continued to attend separate and vastly unequally resourced schools, education policy discourse was underpinned by the need to relate education policy for blacks to the provision of labour. The emphasis on addressing 'manpower needs' and 'skilled shortages' became common currency in education policy documents. This reached its full expression in the state-appointed De Lange Commission Report of 1981.

The vocationalisation of education, underpinned by the human capital theory (HCT) view that education be closely tied to economic growth, should be understood in the context of the overall reformism that the state embarked on in order to ameliorate the 'organic crisis' that characterised the economy and social structure in South Africa during the late 1970s and 1980s. The economy entered into a prolonged decline which, despite two mini-booms in 1979 and 1983 (Cross and Chisholm 1990: 59), had a fundamental impact on state policy. The economy experienced a growing inflation rate, a balance of payments crisis, rising indebtedness, the withdrawal of foreign investment, the low rand and a falling gold price. By 1986 the economy was in a deep recession. Education policy reform unfolded against the backdrop of this changing economic context.

The NP's reformism, however, cannot simply be explained as a response to the economic crisis. Much of the reformism was forced upon the state by the insurrection and resistance against apartheid during the 1970s and 1980s. During this period education was turned into a 'site of struggle' against apartheid and its education system. Resistance in education during this period was the outcome of a complex convergence of a number of developments in and around the sphere of education. Economically, urban reproduction needs became over-riding in state policy which led to the massification of black schooling. A climate of insurrection in townships was fuelled by the successes of regional independence movements in Mozambique, Zimbabwe, Angola and Namibia. Urban students and youth became radicalised by frustrated expectations when schooling failed to prepare them for gainful employment. Low quality schooling provided large numbers of pupils with a fertile context to acquire a homogenous political consciousness. Bundy argues that "by grappling with a distinct set of social and historical problems they developed an awareness and common identity - a generational consciousness, analogous to a class consciousness and national consciousness" (Bundy 1989: 207). Cross (1992), Glaser (1989) and Hyslop (1990) trace the antecedents of radicalism of young people to the chaotic urbanisation of the 1940s. The philosophy of Black Consciousness played a crucial role in the politicisation of the school students and youth. As a powerful mobilisation philosophy that emphasised psychological liberation and the unity of the oppressed (i.e. inclusive of Africans, Coloureds and Indians), Black Consciousness provided a political vehicle for the expression of popular discontent (Cross 1992 and Hyslop 1990). In this general insurrectionary context, the state made two fatal errors which ignited one of the biggest and most tragic uprisings by students the world has seen. Firstly, in scaling down the length of African schooling from thirteen to twelve years to conform to the length of schooling of the other race groups, the state decided to promote all children in Standards four and five to the high school (Standard six) in 1976 (Hyslop 1988: 472). This created a huge bulge in the already overcrowded secondary schools which fuelled the students' discontent over the conditions of their schooling. Secondly, the ill-fated decision to have half of the subjects taught in Afrikaans[49], the pupils' second or third language, provided the catalyst for the uprisings in 1976. Protesting pupils disrupted normal schooling in most of the country's black high schools. Many pupils died, some were detained and others fled out of the country. The pupils protested against their poor educational conditions and the general poverty in South African townships.

Educational resistance became an abiding feature of the political landscape throughout the late 1970s and 1980s. While the 1976 uprising was largely spontaneous, many student organisations sprang up in its aftermath. During 1980, the student boycotts in the Western Cape tied student resistance to worker and broader community struggles against racial capitalism. Alternative education, mainly through awareness programmes run by students themselves, began to lay the seeds for an alternative democratic pedagogy that challenged the authoritarianism of apartheid education (Jansen 1990: 63-65). By 1984, school students were in the forefront of the general popular insurrection against apartheid. Clearly, by this stage, they had rejected the attempts by the state to reform apartheid education. Through their militancy they had turned the schools into 'sites of struggle' where the state had to be resisted in order to overturn the system of apartheid. Bundy has coined the term 'immediatism' in reference to the impetuosity and political immaturity of students which had the effect of diverting the popular protest by causing cleavages in the anti-apartheid forces (Bundy 1989: 213). The National Education Crisis Committee (NECC)[50] was formed with the aim of reigning in the students and providing coherent and visible leadership in the sphere of educational struggles against apartheid education (Muller 1987: 321-324 and Hyslop 1990: 86). The important resistance discourse of People's Education which represented an alternative liberation vision of education in a post apartheid dispensation emerged out of this context.

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[49]. The NP's decision to have Afrikaans as a medium of instruction in African schools was meant to be a ruse to the verkramptes (racial dogmatists) in the party to placate fears over the expansion of urban schooling for Africans as propagated by the urban industrialists.

Educational reform should be understood as a response to the crisis in urban social reproduction of the mid-1970s and 1980s which was largely brought on by almost two decades of resistance to apartheid education. 'Organic crisis' refers to the intractability of reforming racial capitalism without removing race as one of the principal determinants of the capitalist state's social structure. As a means of resolving the national economic crisis and the general atmosphere of insurrection of which resistance in education was a major component, the state embarked on a complex strategy of repression and reform. By the late 1970s the military, under the leadership of the new Prime Minister PW Botha, the former Minister of Defence of longstanding, rose to dominance in the NP. The NP embarked on the so-called 'total strategy' which involved on the one hand severe repression of the leaders of the insurrection, and on the other hand the introduction of ameliorative reforms to win 'the hearts and minds' of black people (see Beinart 1994: 212-238 and Worden 1994: 121-135). These reforms were aimed at reestablishing conditions favourable for capitalist accumulation under new conditions (Nasson 1990: 70-73).

A number of reasons are proffered to explain the state's shift to reform. As I have already mentioned, the NP had become dominated by business interests, with the conservative, mainly poor, Afrikaners supporting the breakaway Conservative Party that was established in 1982 (Worden 1994: 122). Formal links were established in 1979 between the NP and big business when Botha expressed "his support for free enterprise and orderly reform" (Worden 1994: 123). The labour and student resistance of the 1970s convinced the state that it could not rule simply through repression. Moreover, South Africa's image had been even further tarnished internationally by the brutal repression of the student uprisings in 1976. Thus, pressure was brought to bear on the state to implement a new policy strategy that could address the multi-dimensional crisis.

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[50]. In 1989 the NECC was renamed the National Education Coordinating Committee.

In the area of labour relations the state-commissioned Wiehahn report recommended that black trade unions be recognised and registered. The aim with respect to trade union recognition was to provide a legal framework through which workers' grievances could be channelled, thereby preventing repetition of the disruptive wildcat strikes of the early 1970s. However, the outcome of such recognition was that it enabled the black working class to organise around a radical redefinition of power relations on the shopfloor, while simultaneously providing a platform for organised protest against racial capitalism. The Riekert Commission recommended the abolishing of white job reservation but within strictly controlled parameters. Employer demands for a stable labour force were thus being addressed (Worden 1994: 123). The establishment of the Presidents Council, the Tricameral Parliament and the Native Representative Councils in 1983 and 1984 was an unsuccessful attempt at political reform (Cross and Chisholm 1990: 64). The apartheid state's attempt to attain credibility among blacks by co-opting 'moderate' black leaders onto these legislative structures was unsuccessful. There was popular resistance against bringing blacks into the legislative process in subordinate positions while whites still had political control.

In terms of the repressive dimension of the total strategy, security legislation was revisited and amended to give the state's security apparatus wider powers to clamp down on anti-apartheid organisations and individuals. Two States of Emergency were imposed in 1985 and 1986 respectively in order to crush the popular insurrection in black townships (Bundy 1989: 211-217). Detention without trial, politically inspired killings by 'death squads' and banning of leaders became part of the repertoire of repression. This was deemed necessary in order for the state to create the conditions necessary to successfully implement economic, political and social reform.

Educational reform was a key component of the state's overall reformism. The state commissioned the Human Sciences Research Council (HSRC), chaired by De Lange, to investigate and make recommendations for educational reform. The De Lange report was published by the HSRC in 1981 and many of its recommendations were taken up in the education White Paper of 1983. Some of its more liberal proposals, such as the equalisation and desegregation of education, were rejected to placate the right wing in the NP. The report played an important role in shaping thinking about education policy and planning during the 1980s. Its discourse can also be discerned in education policy of the 1990s, especially in the apartheid state's policy approach contained in its Education Renewal Strategy (ERS) documents. I argue in this thesis that many of the assumptions of the De Lange report is apparent in official education policy made during 1994 and 1997 (see Chapters Four, Five and Six).

The state's reformism as embodied in the De Lange recommendations represents an attempt to relate education to the twin challenges of installing the necessary conditions for economic growth and securing and maintaining political stability (Unterhalter 1991: 63-65). In order to be in a position more effectively to achieve the alignment of education with the economy and the depoliticisation of education, the report suggests that macro education policy making be unified under a single ministry (van den Berg 1981: 13). The report's foundational assumption was that "education policies be directly linked to economic development, and that such policies should be accountable in terms of 'relevance'" (Kallaway 1984: 33). In this regard, restoring the harmony between the schooling system and the labour market became a principal aim. The lack of sufficient skilled personpower was presented as at the core of the economic crisis. This led the De Lange Commission to suggest that education reform should be linked with the need to generate an educated workforce which in turn would secure higher levels of productivity and consequently economic growth. It is thus assumed that social stability would be achieved if the academic-centred curriculum approach was replaced by a vocational focus that would produce an employable and compliant workforce (Unterhalter 1991:64).

The De Lange report thus favoured a technicist approach to reform that would have the effect of shaping educational provision along class lines (Cross and Chisholm 1990, Kallaway 1990, Molteno 1984 and Unterhalter 1991). The report suggested that after an initial basic education, the system should have the ability to stream students either into a formal academic track or a career-oriented vocational education. As parental fees would play an important role in supplementing formal education, middle class communities would be in a favourable position to exercise the option of sending their children to fee-charging schools. Nasson suggests that there was a likelihood that poor working class black children would be "shunted into heavily subsidised, narrow vocational training, financed directly by market interests" (1990: 70). This stratum of children would provide the pool of semiskilled labour. It was noted in 1984 that about eighty percent of black students would consequently face the prospect of a narrow vocational education (quoted in Nasson 1990: 70). The report suggested that educational financing would be limited to the provision of infrastructure and the payment of teachers' salaries. This meant that the quality of education would be determined by the ability of parents and communities to augment the state's input, which in turn suggests that middle class communities would be able to 'buy' a good quality education for their children, while poor working class schools would suffer. This approach to reform would thus lead to a new form of differentiation based on class, but not unrelated to the racial patterns already established in the system. The overwhelming majority of black working class children would be streamed into vocational education, whilst most white children and some black middle class children would be able to stay in the formal academic system.

The state's educational reform during the 1980s has been described as an attempt at 'modernising' apartheid education (Kallaway 1984 and Nasson 1990: 75). Aligning education to labour demands was designed to achieve closer articulation between education and the economy. A more vocationally oriented education system would be the key to securing the reproduction of capitalist social relations which would include, among other things, improved living conditions for the settled black working class in the urban areas. Consequently, the material conditions which gave rise to unrest and instability in the urban areas would be removed. Thus, education would play a key role in generating these social relations. However, the reproduction aims of state reformism within education and other social spheres were never achieved at this level. In the context of the intractable organic crisis, the popular insurrections during the 1980s, of which resistance in education was a key feature, created a legitimacy crisis for the state. In turning schools into 'sites of struggle' the student activists had prevented educational reform from fulfilling its socially reproductive role. While many of the education reform measures as outlined in the De Lange report failed to materialise in practice, the enduring feature of this type of reformism was that it established the 'vocationalisation' of education as an influential contending discursive influence in future policy. This discourse gained influence at the behest of the business lobby in partnership with the reforming state during the 1980s and 1990s (see Davies 1984 and Nasson 1990).

Education reform, therefore, in these circumstances, could neither be linked positively to the need to produce semiskilled labour, nor serve as an institution of discipline and social control. On the contrary, educational resistance led to the emergence of a radical alternative educational vision. People's Education had its genesis in the resistance culture that characterised black education since the 1950s. However, it was only in the mid-1980s that an alternative education philosophy emerged. People's Education was popularised under the aegis of the National Education Crisis Committee that was established in 1986 (Muller 1987: 323) As an oppositional discourse, People's Education linked with the goals of transformation, liberation and equality. Muller contends that People's Education, as a response to a political crisis over education, had "political considerations looming larger than educational ones at the outset" (Muller 1987: 327). People's Education was intrinsically tied to the radical transformation of South Africa. It galvanised progressive educational institutions and individuals in civil society in the fight against apartheid and apartheid education. It provided a vision of a post apartheid education system based on equity, redress and non-sexism (NECC 1988). A range of alternative educational resources and teaching materials were developed based on its philosophy. People's Education drew on Freire's emancipatory discourse to derive a vision of education that would generate a critically empowered citizenry. The People's Education philosophy created the expectation that post apartheid education policy would be underpinned by a coherent equity-driven approach. Its discourse, developed in the context of protest, focused mainly on broad principles rather than on a consideration of the internal dynamics and potential contradictions of the education system. This led Kallaway, in an article written in 1988 and published in 1990, to warn that

> If People's Education is to ensure that education is not only to put an end to the politics of racism in education, but is to be instrumental also in creating a more just society by eliminating injustices based on class, this will entail moving beyond the common formula for mass education to an understanding of how reform in education is related to a fundamental redistribution of power, wealth, and privilege

in society (1990: 36).

By the end of the 1980s therefore, we see that two powerful contending discourses occupied the education policy terrain. The state's reformist vocational discourse played a visible role in attempting to construct education policy, while the idealistic People's Education discourse held out hope for the radical transformation of education and society after the fall of apartheid. In the next section of this chapter I focus on the way in which these discourses developed in the period between 1990 and 1994, keeping in mind the warning Kallaway issued about linking education policy to the broader task of changing power relations in society.

3.5 Education policy as negotiation, 1990-1994

This period is aptly referred to as the period of negotiated transition in which South Africa's aberrant and exclusionary political framework was replaced by a legitimate political democracy. The political and ideological nature of the negotiation phase was an important element in determining the education policy context in the post election period. I therefore present a more comprehensive analysis of this period in Chapter Four in developing a policy analysis, situated in global and national context, of macro education policy in the post apartheid period until mid 1997 (see section 4.2). Here, I highlight certain features of the 1990 to 1994 period as background against which the main contending education policy discourses unfolded. I go on briefly to describe the main educational features of the period and the education policy discourses that then operated. I support Christie's view that education policy contestation in the period revolved as much around the political symbolism which was part of the broader contest over political power between the two main parties (i.e. the African National Congress (ANC) and the National Party (NP)), as around the substance of policy and its implementation. According to Christie, "the case of South Africa in political transition is illustrative of the relationship between education policy and hegemonic contestation more generally" (1994: 45-56). Building on this position, I argue that this contestation resulted in the move towards convergence between the apartheid state's education proposals and those of the Democratic Movement. In my view, this convergence has largely gone unnoticed by policy analysts and advocates. It only becomes apparent in the education policy made by Government of National Unity after the 1994 election, which I attempt to show in

Chapter Four.

The period between 1990 and 1994 represents an attempt by the NP to resolve the organic crisis which South Africa lived through during the 1970s and 1980s. The main reason for the failure of the state's programme of capitalist reform during the latter period was its unwillingness to abolish racial segregation as a key determinant of public life. Blacks resisted the state's limited reforms throughout the 1980s. Hence, the state's reformism foundered on its rejection by those who were supposed to be its beneficiaries. By the late 1980s South Africa was in the grip of a severe economic crisis. The flight of foreign capital in response to the international campaign for economic sanctions had eroded the ability of economic recovery and growth. Popular mobilisation and international isolation precipitated the shift to negotiation politics that would lead to a non racial liberal democracy. During 1990 a number of dramatic announcements for the 'normalisation' of politics were made. From 1990 to 1994 a protracted, contested and ultimately successful 'negotiated revolution' was achieved by all the main political groups, excluding a conservative alliance of black and white parties. The outcome of the negotiation was largely the result of agreement, or what has been described as 'sufficient consensus', reached between the NP and the ANC (see Sparks 1994). The ANC under Nelson Mandela, formed the majority component of the Government of National Unity, and effectively became the new political rulers of South Africa who had to deliver on the deprived black majority's high expectations for delivery of basic human rights.

The negotiated settlement amounted to an attempt by the contending political forces to provide the political platform in terms of which the contradictions in the political economy could be removed. Racial segregation impeded the capital accumulation process. The establishment of a liberal democracy based on granting full enfranchisement to all South Africa's people became a necessary condition for the resurrection of economic and capitalist development and growth (Marais 1998:1-6). Despite Kallaway's caution about linking education to changes in power relations (see para 3.4 above), the overwhelming structural orientation of South African society veered in the direction of a reconstitution of capitalist power relations in a global economy (Marais 1998). These structural developments underpinned the negotiation period, but were drowned out as a result of the contested nature of the actual negotiation. The conflictual atmosphere that intermittently characterised the negotiation served to disguise the structural reconstitution of South African society. As with the ideological convergence in education policy, these structural conditions only became evident after the 1994 election.

The main educational developments during the negotiation period were: the growth of black schooling, the semi-privatisation of white schooling, growing deracialisation in church-run and private schools and intermittent educational crises. With regard to black schooling, the twin features established in the 1970s and 1980s continued. Schooling for black children continued to grow at a rapid rate (Strauss et al 1994), but without improvement in quality. It was during the negotiation period that the tenuous condition of black schools began to occupy media headlines. Hartshorne comments that "the relevancy and legitimacy crisis has led to the virtual breakdown of a learning environment in black education" (Hartshorne 1990: 2). The nebulous phrase, 'collapsed culture of learning and teaching', was used to refer to the absence of the appropriate conditions for systematic and orderly learning (see Paterson and Fataar 1998). Black schooling was racked by many crises, including the protests against matriculation examination fees (Chisholm and Kgobe 1993: 7), the teachers strike against teacher rationalisation in 1993, threats by black students to occupy white schools, and student protest marches (see Chisholm and Kgobe 1993: 6-13). The unilateral restructuring of education by the state was evidenced by its attempt to give autonomy to white schools. These schools were placed under the governance of parents who were allowed to charge fees and regulate the admission of children to their schools. This move enabled the well resourced white schools to move away from state control into the hands of whites at the time of transition (Christie 1994: 48). Controlled and limited desegregation of many white schools occurred. This was regarded as tokenism, although it did constitute "the first move toward the desegregation of schooling" (Lemmer 1993: 56). Middle class black parents opted to pay fees at these schools in order to secure a better quality of schooling. Admission of children was on the basis of stringent admission tests. This move was cautiously opposed by the ANC who was keen not to denounce fee-paying as long as the schools "stayed within certain guidelines such as non racialism" (Chisholm and Kgobe 1993:2). Meanwhile, the low quality of schooling for the majority of black children continued to be the main material feature of education.

A number of developments within progressive educational circles occurred during the period which attempted to address the educational crisis and stop the apartheid state from one-sided restructuring of education. I discuss these developments in what I term the 'progressive repositioning' in education in the early 1990s in Chapter Four (see section 4.6.2.1). Suffice it here to say that the NECC's and ANC's interaction with the apartheid state around the education crisis was an attempt by them to relate education to the context of political negotiation. High-ranking office bearers of the ANC played a moderating role in calming protesting students "on the grounds that education should not be destroyed" (Chisholm and Kgobe 1993: 9). The establishment of the National Education and Training Forum in 1993 which included representatives from across the civic society spectrum, political parties and the state, aimed at addressing the educational crises and the long-term restructuring of education. The NETF particularly opposed the apartheid state's unilateral restructuring of education which it thought might pre-empt the efforts at educational reconstruction by a new government after the election. In the context of broader political negotiation and educational crises, two important sets of policy documents, one by the apartheid state and the other from the Democratic Movement, became prominent in delineating the education policy discourse in the early 1990s.

The Education Renewal Strategy (ERS) was put forward by the apartheid state in June 1991 as a discussion document (Lemmer 1993: 56). A revised version was unveiled in parliament in February 1993 (Chetty et al.1993: 49). The ERS also had two accompanying documents namely the 'National Training Strategy' (NTS) and the 'Curriculum Model for South Africa' (CUMSA). I show in Chapters Four and Five how the latter two documents came to play a role in post apartheid education policy making, especially the manner in which it 'guided' discussion in governmental policy fora. The National Education Policy Initiative (NEPI) was advanced by the National Education Coordinating Committee in March 1992 (Chetty et al. 1993: 49). NEPI sought to translate the People's Education philosophy into concrete policy. NEPI published its work in thirteen separate reports which covered most areas of education including: curriculum, human resources development, education support services and teacher education.

The policy proposals of the ERS and NEPI were the outcome of very different processes.

The ERS was produced by state bureaucrats in a process that was closed to public participation. The ERS process followed the technocratic model of policy making in which expert participation was deemed as sufficient to render the proposals 'scientific' and thus beyond reproach. In contrast, the NEPI documents were produced by 300 volunteers and participants from civic organisations under the political control of the NECC. The NEPI was guided by a policy of participation and consultation between researchers, academics and civic organisations. While the process revealed a tension between the need for expertise and democratic participation, NEPI made a valiant attempt at establishing an open and participatory tone for policy formulation (Young 1993: 91). The ERS presented a definitive set of policy recommendations based on the values of freedom of association, diversity and decentralisation. The NEPI advanced a number of policy options[51] (Chetty et al. 1993: 49) with redress, non racism, non-sexism, democracy and equality as its underpinning values (NECC 1993). The NEPI informed a number of ANC documents released in the period as part of its views on education reconstruction.

Bennell et al. (1992) argue that the ERS formed part of the negotiation agenda which fitted into the NP's aggressively-marketed new image as peace maker. The ERS can be seen as an attempt by the NP to regain the initiative in education which it lost in the legitimacy crisis of the 1980s brought on by the resistance of students. As a negotiating posture, the ERS attempted to regain control of the direction and movement of educational change (Bennell et al. 1992: 3) by adopting the language and discourse that underpinned many demands for a democratic education whilst couching it within a growth-led framework. It declared the apartheid state to be in favour of a non racial and unified single education system and committed to the provision of free and compulsory education (Lemmer 1993: 60-61). The ERS supported the principle of maximum devolution of power to communities and supported different categories of schools with different levels of management autonomy and funding frameworks. Other important features were: a decentralised system unified by coordinating structures at central level and the sharing of responsibilities between political authorities at various levels and between different stakeholders (in Bennell et al. 1992). However, the ERS's view on access to schooling and human resource development reveals its ideological predilections. It recommends a seven-year primary phase followed by two years junior secondary and three years of senior secondary schooling. The first seven years would be free and compulsory with exit points at grades seven, nine and twelve. It proposes to stream students into vocational education provided by employer-led vocational education strategies (Lemmer 1993). The ERS thus depends heavily on the willingness of capitalist companies to provide vocational education, which, given their shortsightedness with regard to training of workers, might well not be forthcoming (Kraak 1991). The issue of which students would be in a position to go on to secondary schooling and which would opt for vocational education has led to the criticism that the majority of blacks would be streamed into the latter, while academic education would be the preserve of whites and of a limited number of blacks who would go on to university to form the new core elite (Bennell et al. 1992: 6-7). The ERS proposes that 'clients' bear greater responsibility for some costs of education and that school governing bodies would have the right to set school fees. This is in line with the exclusionary strategies adopted in the semi-privatised white schools to which I referred above. 'Autogenous' or community education was a strong option in terms of which cultural schools could be established. The ERS can therefore be seen as related to the De Lange Commission's emphasis on deracialising schooling while simultaneously supporting differentiation based on class and affordability. Also a legacy of the De Lange Commission is the ERS's stance in support of an economic framework based on capitalist growth. The NP clearly supported the view that education policy should be geared towards the demands of the economy. Education should target the production of appropriate human resources and should promote the interests and values of the world of work (Christie 1994:50).

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[51]. The ANC published two important election documents, 'A Policy Framework for Education and Training' and 'Implementation Plan for Education and Training' (1994), just before the 1994 election which drew on NEPI but went beyond the options to advance a more definitive education policy framework.

It is notable that beyond a rhetorical commitment to equality, the ERS gives no indication of how the historical imbalances in the education system would be eradicated. Christie comments that the silence of the document on how to give effect to equality meant that the ERS "could conceivably entail the continuation of the existing system" (Christie 1994: 49). She argues that this silence is evidence of the preference by the NP for symbolic policy to buttress its ideological position in the negotiation context, as opposed to material policy that spells out how the apartheid legacy in education ought to be addressed (Christie 1994: 49).

Unlike the ERS, the NEPI approach was imbued with the vision of giving substance to equity and redress. A post apartheid system would thus be founded on a commitment to human rights that treated everyone equally and it would incorporate all those sectors which had been marginalised from education such as adults, out-of-school youth and workers. The link between education and the economy would be a progressive one directed by an interventionist state and regulatory legislation that would effect tripartite cooperation between the state, labour and capital (NECC 1993b). Under the influence of the trade union federation COSATU, NEPI favours a high-skill HRD programme that would enable workers and citizens to acquire the broad-banded skills necessary to service a sophisticated economy. Policies on teacher upgrading, the reconstruction of the curriculum and the regeneration of quality in schooling are given prominence. The NEPI provides policy options for the restructuring of the entire education system (see NECC 1993a and 1993b).

Christie cautions that the undifferentiated and broad connectedness to equity in the NEPI proposals is reflective of the Democratic Movement's primary preoccupation with education policy's rhetorical potential, as opposed to the internal substance of the policies. In fact, the NEPI raises the issue as an afterthought in its Framework Report (NECC 1993b). The commitment to equity without a consideration of the limiting effect that growth has on policy conception, has led the NEPI reports to be heavily skewed in favour of the former. This position would be difficult to operationalise because it does not take into consideration the constraints that financial limitations would impose on the ability of policy to effect redistribution. Wolpe was one of the first ANC persons who argued that a balance between equality and development had to be found in order to provide a tenable policy framework (Wolpe 1994: 8). An example of the search for balance is manifested in the NEPI's approach to the length of the compulsory schooling phase. Whilst it was popularly expected that compulsory schooling would be twelve years long, similar to that of white schooling, NEPI scaled this down to nine or ten years (in Chetty 1993: 51). Other examples of the influence of growth in the Democratic Movement's policy positions are: the indication that user fees might have to be levied for schooling, primary schooling prioritised over higher education and the introduction of equitable Pupil-Teacher Ratios (see ANC 1994a and 1994b).

Overall, NEPI presented a historically sensitive and coherent set of proposals. NEPI was underpinned by the need to build a reconstructed education system. In contrast, the ERS encouraged educational differentiation based on class. The divergent orientations of these two approaches to policy have to be seen in the light of the ideological and political 'warfare' inherent in the broader arena of political negotiation. The lack of detail in the ERS on the principled basis for educational change on the one hand, and the underspecified commitment to equity and redress by NEPI on the other, is the result of their operating in two distinct ideological universes. In order to give leverage to their negotiators, and in attempting to gain the upper hand in the battle for dominance over education policy before the installation of the GNU, these positions were presented as distinct and oppositional. However, I am of the view that considerable discursive convergence can be detected between the two competing educational discourses. This is shown by their respective positions on the need to relate education to the economy, despite their different approaches. Thus whilst the ERS favours free market principles and NEPI supports state intervention and regulation, nonetheless they both favour a reduction in the length of schooling from twelve years, the integration of education and training, school user fees and down scaling of the state's commitment to funding universities. These convergences do not result from any common starting point. The NEPI and ANC policy documents published in 1993 and 1994 support a coherent, overall restructuring of the system, while the ERS displays a piecemeal approach (Chetty et al. 1993 50-55). However, the proposals converge fundamentally around financial affordability, i.e. the necessity of relating education policy to the size of the education budget which neither expect to increase substantially. Therefore, despite the conflicting policy positions portrayed by these two parallel discourses, the positions they share point to some convergence of education policy discourses just prior to the election. The question remained: would education policy after apartheid in the new context of democratic governance reflect this convergence? While radical policy positions in education are usually tempered by realism when there is a real prospect of power and hence responsibility for delivery, the particular global conditions, described in Chapter Two, provide the prospective ANC government with a particularly tight set of constraints in terms of which education policy has to be developed. Education policy has to be evaluated in respect of the way it mediates the constraints of the 1994 - 1997 conjuncture.

3.5 Conclusion

In this chapter I have discussed the historical development of education in South Africa, outlining the origins and genesis of segregated education and its more rigid successor, apartheid education. I have argued that educational development ought fundamentally to be understood within the unfolding context of a changing political economy and the related shifting social relations. The resultant racial differentiation in schooling gave rise to a system of inferior schooling for blacks. But it also led to educational resistance in which children who were brought in large numbers into poor quality schools resisted the inferior education foisted on them. Hence, apartheid and educational reformism was rendered ineffectual as a means of resolving the multifaceted organic crises of the 1970s and 1980s.

Between 1990 and 1994, under increasing pressure to dismantle apartheid, negotiation became the main political strategy to break the deadlock. This occurred in the context of an international ideological realignment which gave rise to the dominance of global capitalism. The negotiated settlement established a liberal democratic political framework which laid the basis for capital accumulation in the context of a global economy. The education political terrain was characterised by policy contestation between the apartheid state and the Democratic Movement. The ERS and NEPI embodied divergent policy approaches and options for a new South African education dispensation. However, these divergences ought to be understood at the discursive level as part of the broader hegemonic contestation of political negotiation. Accordingly, the ERS and NEPI were more symbolically related to the negotiation process than to material policy for education reconstruction (Christie 1994). However, it is evident that the ERS and NEPI have a number of policy similarities that are indicative of an underlying convergence of education policy. Chapter Four will examine in how far post apartheid education policy is related to these convergences.

Chapter 4: Macro education policy in the transition: toward an explanatory framework

4.1 Introduction

In this chapter I analyse education policy developed by the state during May 1994 and mid-1997. This period represents a distinct and relatively stable period of policy making.

I set out to develop an explanatory analytical framework to understand the nature of the overall education policy trajectory established in this period. Through this macro-level analysis, I hope to suggest an understanding of the government's direction and vision of educational reconstruction, as well as the nature of the policy processes in which policy has been constituted.

The main contention of this chapter is that education policy has to be understood in the light of broader social reform policy and that education, following Jonathan (1997: 11-20), presents a prime site for uncovering the vision of both education and broader socioeconomic reform in any transitional society. I therefore focus on the interaction between these two dimensions, i.e. on education reform and broader socioeconomic reform, in the construction of education policy.

The conceptual framework I provided in Chapter Two is employed here to guide my analysis. I am essentially concerned to understand the specific expression of the equality and development relationship embedded in education policy. Following Ball (see para 2.6), my analysis will be made at two distinct levels: 1) the structural political economy level, and 2) the political level which involves an analysis of policy and political contestation over policy outcomes[52].

The chapter is constructed around four dimensions. Firstly, I utilize the notion of

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[52]. I will not focus on the third level that Ball refers to, i.e. the ideological dimension, which concentrates on the way policy is conceived, discussed and represented. The ideological level involves a discourse analysis of the manner in which education is involved in the transmission of the dominant culture (see para 2.6).

'settlement' (Smythe, 1995: 43) to characterise the political and ideological context in terms of which education policy ought to be understood. I challenge a triumphalist reading of policy which is imbued with a miscalculation of the contemporary political and ideological climate. I prefer an understanding of policy that is based on a modest conception of change in the transition.

Secondly, I explore the nature of broader social change by analysing the state's shifting socioeconomic policy discourse as indicated in the ANC's Reconstruction and Development base document published weeks before the 1994 election, the Government's Reconstruction and Development Programme White Paper in November 1994, and the Growth, Employment and Redistribution (GEAR) economic policy framework accepted in 1996. Education policy development ought to be understood within the context of broader social reform. The period between 1994 and 1997 witnessed a rapidly narrowing socioeconomic policy environment which delimited education policy development.

Thirdly, I analyse the impact of socioeconomic policy on education policy development. I argue that there has been a narrowing of the education policy agenda concomitant to that of socioeconomic policy. This narrowing is explored viz. an analysis of the first White Paper on Education and Training and the policy proposals for the integration of education and training under the National Qualifications Framework. The genesis of these policies suggests that the government has over the first three years of democratic rule embarked on a decisive down scaling of a commitment to equality and redress in education.

Fourthly, I focus on the education policy making process. I argue that the process of constructing policy is crucial in understanding policy meanings. I concentrate on the way the government has mediated contradictory tensions and pressures emanating from a reconstructed civil society in an attempt to give expression to its favoured vision of educational reform.

4.2 Literature on macro education policy in South Africa after 1994

A number of important articles by left leaning academics appeared after 1994 which centred around macro education policy in South Africa. They analyse policy against the backdrop of the changing global economy and the negative neo-liberal influences that is said to accompany it. Kallaway (1995, 1997a) discusses education policy in relation to the changing transitional context of the mid-1990s in which socioeconomic choices by the government play a determining role in the outcome of education policy. Similar types of analyses which stress the linkages between economic and education policy are provided by De Clerq (1997a) and Christie (1997). Kallaway argues that two competing discourses, i.e neo-liberalism and social democracy, are conflated in policy. While the education policy documents are made up by words such as equity and redress, an economistic discourse is also detected through the prominence of concepts such as unit standards, outcomes-based education and equivalency. This type of policy ambiguity is the result of global economic influences in the realm of education (Kallaway 1997: 46).

Chisholm (1997: 51) is much more emphatic about the influence of globalisation on education policy in South Africa. In this regard she asks very directly why South Africa has so uncritically chosen to follow global policy patterns in both economic and education policy. She favours the view that the government's choice should be understood within the "shifting social and power relations within a changing international and local economy" (Chisholm 1997: 53). She argues that the contradictions visible in education policy can be partly explained by the character of the Government of National Unity (GNU), in which the interests of the international and local bourgeoisie, made up of an alliance of old and new elites, operate to constitute the public sphere (Chisholm 1997: 53). For her the government's chosen policy trajectory represents the re-emergence of Human Capital Theory (see para 2.5.7) as the main policy framework that governs education policy formulation.

In an earlier article Chisholm and Fuller (1996: 693) lament the demise of People's Education in the policy terrain. They argue that after the democratic election South Africa moved decisively away from the transformational and collectivist priorities of People's Education in the direction of a centrist pro-human capital position (Chisholm and Fuller: 1996: 694). De Clerq (1997b) considers the effects of the policy making process in shaping policy. She concludes that South African education policy after 1994 could be regarded as embodying a symbolic vision that is unrealisable in practice. She argues that education policy does not sufficiently take into account the difficulty of having to implement radically different policy in contexts which cannot sustain the implied changes. She thus contends that the policy proposals are flawed as a result of their inability to take into account the educational context and dynamics on the ground (De Clerq: 1997b: 127). She concludes that education policy favours the more privileged and organised in society.

Kraak (1998) focuses on the underlying discourses of education and training policy. He identifies three main competing discourses namely: a radical, a systemic and an Outcomes-based discourse (Kraak 1998: 1-3). He explains the shifting nature of education policy discourse from the late 1980s to the current period. An Outcomes-based discourse, masked and legitimated by the appropriation of People's Education language, is currently dominating education policy. He attributes the dominance of this discourse to the convergence of worker and business interest in establishing training needs as hegemonic in education policy.

The literature I referred to above provides a number of very important starting points for my analysis. Greater elaboration and synthesis of this work will feature strongly in this chapter. However, some of their weaknesses are: 1) a deterministic and conspiracy theory understanding of the impact of globalisation, 2) an inaccurate understanding of the educational transition which leads to a triumphalist analysis of policy, 3) a misreading of the state's role in mediating the equality and development tension, and 4) a lack of understanding of contestation that surrounded the policy process. In this chapter I will give attention to these four aspects in my attempt to derive a more appropriate explanatory model to understand education policy in the first years of democratic rule.

4.3 Education policy in the context of a negotiated political transition

> 'Transition' is reflective of an interregnum which refers to a situation where stepping into the 'new' era with a broad vision of social reconstruction and equality is continuously impeded by the existing structures of power and domination (Fataar 1997b: 334).

In South Africa a negotiated political consensus with regard to the country's political direction was achieved between 1990 and 1994. This period saw the establishment of a 'procedural minimum'[53] (O'Donnell and Schmitter 1986: 8) which contained the necessary elements to inaugurate a political democracy. Most commentators concur that South Africa's political settlement which established its first democratic government was impressive with some even describing it as a miracle (Sparks, 1994; Murray, 1994; Lodge, 1994).

Societies that have emerged from autocratic rule and have established representative political democracies usually set for themselves the goal of achieving fundamental social reconstruction in order to secure acceptable living conditions for all their citizens. Political democracy sets up the possibility for these societies to overturn the legacy of inequality bequeathed to them by oligarchic rule. In other words, the transition to democracy makes a second transition possible, i.e. to establish living conditions based on acceptable norms of human rights. Achieving the developmental imperatives of the second transition is not inevitable. Thus, while hailed as a miraculous political achievement, the South African negotiated settlement ought to be evaluated in terms of whether it enables the achievement of the second transition. That is, whether formal equality of opportunity would lead to equality of outcome (Schmitter and O'Donnell 1986: 12).

This section considers the extent to which the period between 1994 and 1997 has been delimited by the negotiated settlement. The main argument I pursue is that the nature of the state and education policy cannot be understood outside of these delimitations. Policy ought to be read fundamentally, if not deterministically, as the outcome of contextual circumstances. The focus of this section is on the link between the first transition, i.e. the period before April 1994, and the second transition, post 1994. The substantive meanings of education policy after 1994, I contend, has to be understood within the contextual circumstances established before and during the first few years of the post apartheid period. There are continuities and discontinuities between these two periods. Education policy after 1994 has to be understood in relation to the continuities in the political terrain which govern both periods, but account should also be given of the way in which these two periods differ qualitatively in their political and transitional character. However, this section, in seeking to ascertain the influence of the 1990s conjuncture on policy formulation, places emphasis on the continuities between the periods before and after the 1994 election[54].

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[53]. Schmitter and O'Donnell (1986: 8) argue that "secret balloting, universal adult suffrage, regular elections, partisan competition, and executive accountability" should be an agreed on minimum to establish a political democracy to replace limited authoritarian rule.

The nature of the transition in South Africa is determined by a confluence of national and global factors. The negotiated settlement represents a compromise with the old apartheid power structures which have been reconstituted through a new political language, devoid of its racial baggage. While race has been removed as a cornerstone of public life, a structural framework has been installed since the late 1970s that precludes radical social change. Instead, the current period is characterised by a market democracy and a conservative ideological framework which has its roots in global influences on public policy in South Africa since the late 1970s. The current slide away from radical educational policy, or what I want to describe as the 'narrowing of the educational agenda', ought to be understood as the outcome of a severely circumscribed transitional context. It is to an analysis of this context and its implications for educational change that I now turn.

The decades of the 1970s and 1980s witnessed the greatest conflict in the history of apartheid between a reforming apartheid state and an increasingly impatient resistance movement. State reform during this period was aimed more at providing an ameliorative framework for the continued existence of apartheid, what Nasson (1990) describes as the modernisation of apartheid, than to establishing a representative non racial democracy. Under the influence of industrial capital whose economic profitability had been compromised severely, the state began to drop many of the crude features of classical Verwoerdian apartheid (Sadler, 1987). Some of the reforms adopted were: controlled black urbanisation, limited political representation, expansion of black schooling, recognition of worker unions and improved working conditions (Sadler 1987: 128-140). However, state reformism did not target the removal of race as a principal determinant of political life in South Africa (see Chapter Three).

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[54]. As I explained in the introductory chapter, this thesis argues that education policy made between April 1994 and March 1997 should be evaluated in terms of this period's relatively consensual and distinct contextual settlement.

Sporadic popular uprisings occurred throughout the period of apartheid reformism. Galvanised by a uniting radical protest discourse, resistance was aimed at the overthrow of the apartheid state and the installation of a non racial democracy. All sectors of civil society including health, social welfare, labour and civic affairs were mobilised in the pursuit of this goal. Democratic forces were committed to the radical transformation of society which would entail the provision of equitable standards of living for all citizens. An inspiring radical politics based on an unfettered pursuit of equality and redress provided the cement which united the anti-apartheid civil forces against the racial order which was to be replaced by a radically different social system based on equity and social justice. However, the state continued to pursue policies to ensure the continuity of apartheid through the expansion of the capitalist economy, the reproduction of the racial division of labour and protection of the unequal social and political structures (Nasson 1990: 60-63).

As a consequence of a complex mix of economic sanctions, international isolation, capitalist dysfunctionality, underground guerilla warfare and popular mass uprisings, the 1980s witnessed unprecedented levels of conflict between the state security forces and the popular resistance. Through the implementation of two States of Emergency, the state mercilessly used its repressive machinery to contain the uprisings. In this context of mutual antagonism, conflict and hardened political positions, there was very little room for negotiation.

The mass uprisings never posed a fundamental threat to the apartheid state whose security structures were still in a position of dominance and repressive control over the country. The apartheid state was, however, forced to change its position of governance through repression via its security council[55] to opening the door for the reinstatement of political governance. A negotiated political solution became a real possibility because of the increasing contradiction between race and capitalism. Racial social structures, instead of facilitating economic development and capitalist expansion as it had done relatively successfully until the mid-1980s, became a major impediment in securing the conditions for economic growth (Sadler 1987: 161-184). Race-based reproduction of social relations thus came into conflict with the conditions to secure capitalist accumulation. By the end of the 1980s the balance of contending political forces had neither favoured the liberation movement nor the apartheid state. Instead an unstable and static political equilibrium existed which kept South Africa on a political knife-edge.

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[55]. It was common knowledge that an inner circle of securocracts under the militiristic President Botha governed the country from the mid 1980s and not the cabinet (Murray 1994).

Under the then incumbent State President De Klerk a resolution to the intractable political situation began to emerge which caught the liberation movement off guard. In the context of a collapsing socialist Eastern Europe and Soviet Union which marked the discrediting of state socialism and the emergence of capitalism as the hegemonic economic mode internationally, De Klerk changed the entire political terrain. He released Mandela and other political prisoners, unbanned the liberation organisations and allowed political exiles to return. He committed himself to the liberalisation of the political terrain as well as to a political settlement which would be secured through a multiparty negotiation process (Sparks 1994: 17).

As Schmitter and O'Donnell (1986: 9-11) suggest, in cases of transition from authoritarian rule to a political democracy, liberalisation almost always precedes democratisation. The South African case bears testimony to this position. A certain degree of liberalisation had already begun to emerge in the mid-1980s and accelerated after 1990, of which the following are examples: the deracialisation of educational institutions despite officially still being outlawed, and the scrapping of the Immorality Act, the Population Registration Act and influx control. Worden comments that the scrapping of these measures did little to challenge the existing political and social order, but that it signalled a move away from race to class differentiation (1994: 124).

Importantly, through the state's reform, the roots of which had been planted in the late 1970s, this liberalisation was accompanied by neo-liberal measures. The apartheid state initiated a period of general reform in the early 1980s. This saw the introduction of new 'liberalised' labour relations, a major urbanisation strategy, privatisation and the deregulation of the market (see Saul 1992: 19). Similar to first world contexts such as the United Kingdom and the United States of America in the 1980s, the apartheid state had now increasingly begun to absolve itself from the provision of social services. The reform measures were consonant with, on the one hand, capital's desire to create new conditions for capital accumulation, and, on the other hand, the neo-liberal objective of removing the state from providing for the social welfare needs of the black majority.

Kallaway warned in 1988 that the apartheid state's education reform, which it embarked on throughout the 1980s was not merely political tinkering. Despite official rejection of De Lange's proposals, the reforms were largely based on his report of 1981 (Kallaway 1995:3). Kallaway argued that educational reform should be seen as part of a broader, more insidious pattern of educational rightism emerging in the international arena (Kallaway 1988: 509). Similar to developments elsewhere in the world, a key feature of education in South Africa was the increase in subsidisation of private schools in the 1980s, and the move towards the 'semi-privatisation' of white schools in the 1990s (see para 3.5). Another key feature was the vocationalisation of the curriculum to produce black skilled labour (Nasson 1990: 66-68). Both these features have become prominent in the current period and have led to the entrenchment of a dual school system, one for the largely white and small but increasing black middle classes, and one for the majority of impoverished blacks (see para 6.4).

From the above it is apparent that the move towards a negotiated political settlement was preceded by a decade of ideological positioning in terms of which the political terrain was delimited in line with a neo-liberal political framework. The ability to procure a dynamic process for the radical transformation of South Africa based on redress and equality is thus severely circumscribed. Instead, negotiation involved the softening of radical positions. In as much as negotiation could be successful, it had to marginalise these extreme and radical positions. This applied to both right and left wing radicalism. The negotiated outcome became possible as a result of its ability to draw in almost the entire political spectrum except some marginal groups on the fringes. What was obscured from the negotiation picture, and purposefully so because its success depended on it, was the extent to which the ideological terrain formed the backdrop of the emerging consensus. Debate over the form of the political democracy hid from view the global capitalist terrain in terms of which a post apartheid democratic government had to deliver on the expectations of the poor.

The negotiated settlement gave expression to the indecisive balance of political forces which it tried to resolve. The apartheid state did not capitulate to the radical demands of the liberation movements[56]. The settlement incorporated many of the demands of increasingly insecure minorities. The jobs of white bureaucrats were guaranteed which would later give rise to problems in the policy making processes. Minority parties would be incorporated for five years into the GNU in pursuit of consensual government and a politics of reconciliation. The Interim Constitution incorporated a number of federal powers in terms of which provinces have control over key areas of public policy. Education was afforded federal powers (Interim Constitution, 1993, as amended). The extent to which the new state could effect coherent national policy throughout the provinces is thus limited by the federal elements in the Constitution (see Kruss 1997: 99-100).

While the settlement incorporated the demands and fears of minority groups and promoted reconciliation and peace, it compromised on the establishment of a framework for social change. As I have indicated earlier, this failure ought to be understood in the light of the ascendance of the historically constituted neo-liberal political economy. The negotiated settlement is thus a product of its time and space. According to Wolpe (1994: 16) negotiation channelled the struggle against apartheid into the structures of the institutional order which it sought to displace. This would compromise the radical aim of overhauling or displacing state structures. Wolpe argued that negotiation represents a displacement of revolutionary by reformist objectives. However, despite his sober assessment he still expressed the hope that "the partial 'normalisation' of political contestation would open the way towards a radical transformation of polity and economy in South Africa" (Wolpe 1994:16). Contrary to this, I contend that the political character of the post apartheid transition undermined such transformational possibility. With the erstwhile vibrant civil society neutralised, activists becoming bureaucrats and civic movements either having disbanded or now organising around their own parochial concerns (see Friedman and Reitzes 1996: 64-68), free market interests have become dominant. The economic power of the corporate sector has gained decisive leverage in state circles (Marais 1998: 185). Together, with the converging interests of the new and old elites, concerns over economic growth and development have supplanted the ideals of social equality (Adelzadeh and Padayachee1994: 16). Therefore, the policy making arena has had to suffer the imprint of a hostile political and ideological environment. Education and other public policy must therefore be analysed in relation to the manner in which the transitional terrain has placed a constricting framework on policy formulation.

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[56]. On the contrary, the success of the negotiation and the smooth running of the election necessitated the existence of a relatively stable state to ensure that state power is used to give effect to the settlement.

Recognition of the above trend does not necessarily imply the ultimate dominance of the neo-liberal discourse. Educational change committed to redress and which challenges the neo-liberal position needs to be conceptualised within the context of the transition outlined here. Bowles (1993:35), theorising about education in South Africa, asks whether education can contribute to the creation of a just society free from the domination of wealthy white males. He is concerned with whether education may contribute to social reconstruction or to new forms of inequality. Bowles suggests that the deeply entrenched nature of the existing inequities and the embeddedness of power relations in South Africa's social fabric require a "suitably modest conception of the transformative powers of education" (Bowles 1993: 35). He comments that:

> Modesty in this case is not a prescription for quiescence or for a lowering of expectations. Quite the opposite: to recognise the ways in which social structures of domination may defeat progressive educational objectives is to *simply accept the insufficiency of educational reform and the necessity on educational grounds for a transformation of the social order* (Bowles 1993: 36) (my emphasis).

This points to a long-standing theoretical dilemma within the sociology of education and to which I have alluded in Chapter Two - the relationship between education and social change. The position I favour is one which locates educational change within an overall long term development strategy. Education would thus be understood as part of, and not as a panacea for, broader social change. The relationship between the nature of overall socioeconomic development policy and education policy forms the focus of the next section.

4.4 "Narrowing" of the socioeconomic development policy agenda

The nature of overall social transformation in South Africa has been debated very sharply since 1990. Initially debates centred around the extent to which the major components of the democratic movement were committed to socialism and associated ideological precepts such as nationalisation, socialisation of agriculture, public ownership of the means of production and the merits and demerits of a mixed economy. However, transformation discourses began to moderate considerably in the light of an increasing realisation of the (apparent) outmodedness of socialism within a globally reconstituted capitalist political economy. An apt illustration of this moderation is to be found in the democratic movement's attempt to generate education policy through the National Education Policy Investigation (NEPI, NECC 1993). The final NEPI report, while founded on equality and redress, tempered its finding with the following comment:

> Policies aimed at meeting popular demands for equality in some spheres tended, given scarce resources, to contradict policies geared towards economic growth and development, even when the latter were aimed at producing the means to achieve equality in the future (NECC 1993a: 14).

By 1994 debates on transformation revolved around the need to establish a firm policy framework to guide the work of a popularly elected government. Election campaign rhetoric generated expectations for transformation. The Reconstruction and Development Programme (hereinafter referred to as the RDP base document) published by the ANC just before the 1994 election contained a broad plan for social reconstruction. The RDP White Paper, published in November 1994, constituted the ANC-led GNU's attempt to capture a reconstruction vision for state policy. The RDP White Paper diverged on a number of issues from the RDP base document, veering in the direction of a compromise on equality. The GNU's adoption of the Growth, Employment and Redistribution (GEAR) policy in June 1996 marks the completion of a policy swing-around that started from the early 1990s. GEAR preferred a 'growth-first, equity-later' model. An analysis of the shifting socioeconomic policy trajectory is necessary for understanding education policy development in the post election period (see Kraak 1998, Kallaway 1997a, Chisholm 1997).

4.4.1 The RDP base document

The RDP base document (ANC 1994a) ought essentially to be read as an election manifesto aimed at garnering votes for the ANC. It is nonetheless crucial for understanding the ANC's (the then government in waiting) perspective on macro restructuring and transformation. The document is noted for its rigorous and open consultation process. It invited broad participation after its publication by asserting that "this process of consultation and joint policy formulation must continue as the RDP is developed into an effective programme of government" (ANC 1994a: 1). The expectation was created of continuing popular participation in the formulation of the RDP as state policy. Despite this, the RDP White Paper and the GEAR policy document were subjected to much less public participation (see para 4.4.2 and 4.4.3).

The substance of the RDP base document was shaped amidst fierce lobbying by the Congress of South African Trade Unions (COSATU), a key ANC alliance partner who acted out of concern at the lack of a coherent development programme prior to the election (Nondwangu 1996:46). The document was informed by the work of the leftist Macro Economic Research Group (Pillay 1996) who later became marginalised in the formulation of state economic policy. Representing a consensual and united voice, the document obscured the contending ideological forces that constituted the ANC before the election. Tendencies that were submerged came to play a more dominant role in state policy after the election (Nondwangu 1996:46).

The RDP base document provides an integrated, coherent and visionary framework for socioeconomic development. Rooted within a sensitive understanding of the historical legacy of colonialism, segregation and apartheid, the document emphasises a number of features as its point of departure. These include the racially skewed nature of the economy, the underdevelopment of the homelands and other rural areas, and segregation in the provision of education, health and employment. The result of these and other features according to the document is that in every sphere of society - economic, social, political, moral, environmental - South Africa is confronted with serious problems (ANC 1994a: 2-3) which require a programme "that is achievable, sustainable, and meets the objectives of freedom and an improved standard of living and quality of life for all South Africans" (ANC 1994a: 4).

The equality thrust of the RDP base document is captured in its six principles. The first principle refers to an integrated and sustainable programme, which is subjected to a 'people-driven process' (second principle). The other principles are: peace and security for all (third principle), nation-building (fourth principle), and the democratisation of South Africa (sixth principle) (ANC 1994a: 4-6). With regard to the link between reconstruction and development (fifth principle) the RDP base document states emphatically that:

> The RDP is based on reconstruction and development being parts of an integrated process. This is in contrast to a commonly held view that growth and development, or growth and redistribution are processes that contradict each other. Growth - the measurable increase in the output of the modern industrial economy - is commonly seen as the priority that must precede development. Development is portrayed as a marginal effort of redistribution to areas of urban and rural poverty. In this view development is a deduction from growth. *The RDP breaks decisively with this approach. ... The RDP integrates growth, development, reconstruction and redistribution into a unified programme* (ANC 1994a: 6) (my emphasis).

The RDP base document favours a position that seeks to establish social equality based on an integrated and coherent socioeconomic reconstruction and development approach. Economic growth imperatives are thus subjected to the broader goal of the eradication of poverty and inequality.

How does the document conceptualise the restructuring of the economy? The document acknowledges the many problems that beset the South African economy which it contends is in the throes of a deep-seated structural crisis (ANC 1994a: 75). Some of these problems are: control of economic power in too few hands, stagnant investment levels, dependence on mineral exports, regional disparities, lack of small and medium scale enterprises, high unemployment, cheap labour and rigid labour markets (ANC 1994a: 75-78). Economic reform would not happen along commandist and central planning lines, nor would it be based on an unfettered free market model. A mixed economy is favoured in which the state would play a strong enabling role in establishing a dynamic and balanced economy (ANC 1994a: 78-79). It is suggested that integration into the world economic market be done carefully in order to protect and expand local industry. The document suggests that integration "into the world economy should be in a manner that sustains a viable and efficient domestic manufacturing capacity" (ANC 1994a: 80).

The document is strong on the need to develop an integrated education and training system. This issue is taken up in various education policy documents before and after the election. A coherent HRD programme would be at the centre of a transformed education system. Unlike later documents, HRD is not understood in narrow functional terms according to which workers are limited to the exercise of simple tasks in a rigid and hierarchical work environment. It argues that a "new HRD strategy must be based on the principles of democracy, non racism, non-sexism, equity and redress to avoid the pitfalls of the past" (ANC 1994a: 60).

The overall vision of socioeconomic development that emanates from the RDP base document is visionary to the extent that it is rooted within the need to radically transform South African society in the interest of all its citizens. It envisions an all-inclusive multidimensional programme for redress. However, the document's main weakness is that it does not account for the manner in which the transitional context in the mid-1990s, characterised by the negotiated settlement which firmly entrenched a capitalist environment, would impede the operationalisation of an equality-driven socioeconomic reconstruction plan.

4.4.2 The White Paper on Reconstruction and Development

The GNU's White Paper on Reconstruction and Development (Ministry in the Office of the President, November 1994; hereinafter referred to as the RDPWP) essentially reflects the untenability of an equality-driven programme in a neo-liberal environment. I consider here whether the narrowing conception of the socioeconomic development agenda as embodied in the RDPWP "represents a very significant compromise to the neo-liberal, 'trickle down' economic policy preferences of the old regime" (Adelzadeh and Padayachee 1994: 2), or whether it maintains an "unstable balance between the contradictory imperatives of equality and growth while not achieving either of these two" (Kallaway 1995: 5).

There are many continuities between the RDP base document and the RDPWP. The latter affirms the need for a comprehensive, all-embracing and consistent programme to meet the needs of a transforming society. The RDPWP emphasises the need for an integrated and coherent RDP programme. The comprehensive and wide-ranging scope of the RDP is illustrated by its focus on issues such as: meeting basic needs, a human resources development programme, democratising the state and society, and rebuilding the economy (Ministry in the Office of the President 1994: 6-11).

Couched within the language and phraseology of state policy and governance, the RDPWP focuses on setting up new structures, planning frameworks, line functions and bureaucratic structures. The language is, however, still tentative and has very little concrete detail on implementation mechanisms, targets and time frames. It committed the government to producing another RDP White Paper in March 1995 which would presumably have had greater clarity on implementation. This White Paper, however, was never published. This could be read as the first sign of a wavering commitment by the government to the RDP as embodying a viable strategy to achieve transformation.

With the constraints of governing now impacting on the government's policy pronouncements, the RDPWP departs on certain key issues from the base document. Nationalisation and public ownership are removed. Privatisation under the guise of the 'sale of state assets' (1994: 21-23) is brought in as a viable economic policy option. 'Fundamental transformation' is tempered throughout the document with the ideologically less radical concept of 'renewal'. 'Affordability' becomes a key concern in a discussion of policy options. Unlike the base document which favours a strong leading hand by the state in implementing the RDP, the state's role is viewed by the RDPWP as largely managerial (1994: 12-20).

Greater discontinuity between the base document and the RDPWP can be discerned in the area of fiscal policy. An entirely new chapter on fiscal policy and the budget has been incorporated into the RDPWP. Concepts such as the internationalisation of the economy, export-led growth, fiscal discipline and trade liberalisation have been incorporated. The RDPWP elevates budgetary constraints, i.e. the question of how the RDP will be funded, to a key consideration which would determine the efficacy of the RDP. Some of the funding strategies considered are: reprioritising of government expenditure, saving money from public sector restructuring, greater bureaucratic efficiency, directing expenditure from consumption spending towards capital investment and changing the budgetary process (1994: 14). International grant aid would be directed towards funding the RDP (1994: 14). It is clear from the RDPWP that the budget size will not be increased.

The RDPWP's view on fiscal discipline presents a clear picture of the government's financial and budgetary thinking. Economists have been quick to point out that in countries undertaking major transformations such as South Africa greater flexibility is required around fiscal targets (Adelzadeh and Padayachee 1994, Pillay 1996, Gotz 1996). The RDPWP's view on fiscal discipline, however, veers in a more cautious direction. On the basis of the view that the "deficit has reached disturbingly high levels" (Ministry in the Office of the President 1994: 30) the government is committed

> ... to the progressive reduction of the overall deficit. The government's commitment to maintaining fiscal discipline is a tool to ensure sustainability of the RDP in the medium to long term. Excessive government deficits will result in higher inflation, higher real interest rates, balance of payments problems and lower economic growth, thereby undermining the RDP (1994: 30).

In conjunction with this moderate stance on fiscal matters the RDPWP warns that it will not further jeopardise the balance of payments crisis by incurring debt to fund RDP projects. Financial reprioritisation, greater spending efficiency and the effective management of resources would generate funding for the new restructuring priorities

(1994: 30-31). The RDPWP's position on funding has to be understood as the outcome of both the constricting parameters of a global environment which South Africa is keen to enter, and the moderating effect that governance, as opposed to opposition politics, has on policy.

Fiscal discipline, however, has a great impact on the size of the budget and internal budgetary prioritisation. Fiscal discipline has the effect of reducing the budget. It places pressure on the government to reduce its commitments with regard to the provision of social welfare issues such as health care, welfare, social security programmes and basic education. Adelzadeh and Padayachee (1994) caution that the fiscal crisis facing this country should not be exaggerated. Quoting from an influential credit rating agency attached to the International Monetary Fund, they argue that the government might be overstating the fiscal crisis. While fiscal discipline will always be an important factor in macroeconomic thinking, they argue that it should not narrowly be understood as having a constraining impact on budgetary spending (Adelzadeh and Padayachee 1994: 6-7). Contrary to this view, the RDPWP represents a view of fiscal discipline which would result in a declining commitment by the government to making the RDP work. In fact, the minimalist view the government adopts brings into question whether the normal social welfare functions for which the state is responsible (let alone funding of the restructuring model proposed by the RDPWP) can be adequately funded.

In answer to the two considerations I posed at the beginning of this evaluation of the RDPWP, my response to the first one, in the light of the argument I made above, is that the extent to which the RDPWP represents a radical departure from the vision embedded in the base document, it can be viewed as a compromise to a neo-liberal trickle down economic mode. My response to the second question is that the RDPWP manifests an uneasy compromise between an equality discourse aimed at fundamental transformation on the one hand, and a contextually imposed growth discourse on the other hand. Put in another way, the radical view of transformation is compromised by the conservative consequences of a narrow financial policy framework. As a policy position this unstable equilibrium is untenable. It stood in need of being resolved either way in order for the state to embark on a clearly demarcated socioeconomic path. The GEAR strategy (1996) brings a resolution to this problem. I now move on to a discussion of the nature and consequences of this resolution. I argue that a clear vision of policy only emerged in 1996 with the acceptance of the GEAR strategy as state policy.

4.4.3 The Growth, Employment and Redistribution strategy (GEAR)

The closure of the RDP office[57] in March 1996 was the first sign that the RDP as the primary programme for reconstruction and transformation was about to be discarded. But, this belies the more substantial reasons for this decision. A number of developments converged to push the RDP from its privileged position at the centre of the state's socioeconomic development programme. The increasing marginalisation of worker participation in state policy[58] played a role. The value of the rand dropped between February and March 1996 by twenty five percent. The media laid the blame for this rapid decrease on 'inappropriate economic policies'. Business interests were beginning to have a considerable bearing on policy. Gotz (1996: 12) argues that the closure of the RDP office gave business a gap to renegotiate economic policy in its favour[59]. In response to the closure the Financial Mail commented triumphantly that "government intervention must give way to the market, growth is essential for economic stability and competitiveness" (Financial Mail 5/4/1996). Gotz is more apt in his assessment of the sidelining of the RDP when he comments that "indications are that the office was shut to make way for a new ethos and method of coordination not yet revealed" (1996: 14).

Minister of Trade and Industry, Alec Erwin, a former key COSATU strategist, provides some views to explain the government's economic policy choices particularly with regard to the RDP's marginalisation. According to Erwin "two things happened: everyone started to ghettoise the RDP and RDP funding became difficult to operate" (1996a: 23). Furthermore, he comments that "we simply underestimated the pressures on an economy like South Africa's, and the difficulties in bringing about change and growth" (1996a: 18). Thus, the RDP in providing a simplistic template for socioeconomic development stood the chance of "digging for oneself a hole that can take a lot of years to get out, sometime those years are the difference between one standard of living for some and another standard for others" (1996a:18). However, labour lamented what they saw as the sidelining of the RDP[60] which for them meant that there is now no coherent focus for transformation to which the state could be held accountable.

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[57] The official reasons for the closure of the RDP office given by the government were: that the RDP office will be relocated to the Department of Finance and the Deputy President's Office, responsibility for the RDP projects will be with the different ministries, the RDP is still official government policy,and the closing of the office was the next stage of the programme, the result of positive evolution (Marais 1996).

[58] Prominent former members of COSATU were co-opted to work in the RDP office. Unionists observed that these persons often justified and defended very conservative state policy (Gotz 1996:11).

[59] Left-wing groups reacted angrily to GEAR. COSATU and the South African Communist Part questioned its conservative fiscal approach. The Workers Organisation for Socialist Action commented that the ANC adopted orthodox economic policies (Marais 1996).

The GEAR strategy puts in place a macroeconomic framework for the rebuilding of South Africa's economy[61]. As its starting point GEAR highlights the need for a strategy to achieve sustained economic growth. It regards job creation as the primary means for achieving redistribution (Ministry of Finance 1996: 1). GEAR targets an economic growth rate of 6% per annum by the year 2000 and an employment creation rate of 400 000 jobs per annum by the year 2000. It states that an expansionary fiscal strategy would only serve as a short term measure which would not be able to address the deep-rooted structural distortions in the economy (Ministry of Finance 1996:3).

GEAR suggests an alternative fiscal approach which contains the following elements: a faster fiscal reduction programme, cutting state spending, consistent monetary policy, gradual relaxation of exchange control, industrial restructuring, stimulation of foreign investment, keeping inflation in single digits, labour market flexibility, wage restraint, enhanced human resource development, and the restructuring of state assets (Ministry of Finance 1996: 2). According to GEAR these measures are needed in order "to break current constraints and catapult the economy to higher levels of growth, development and employment to provide a better life for all" (Ministry of Finance 1996: 2).

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[60]. The RDP was sidelined after eighteen months of poor delivery, weak implementing capacity, bureaucratic corruption and efficiency (De Clerq 1997: 152).

[61]. The GEAR policy was drawn up in a highly technicist and non-transparent manner by economic experts tied to institutions such as the Finance Ministry, the Development Bank of South Africa, the World Bank and the Reserve Bank. COSATU and other civic organisations were completely ignored. The notion of popular and transparent policy formulation suffered a severe blow as a result of this type of policy approach (Marais 1996: 29).

GEAR subscribes to the view that economic growth has to be the main target of development. In order to achieve this it argues that government consumption spending be cut back and that private and public wage increases be kept in check (Ministry of Finance 1996: 5). The appropriate measures should be taken to counteract inflation. The country's debt burden would have to be relieved through the pursuit of strict fiscal and monetary policies. The GEAR package would "establish a stable platform for a powerful expansionary thrust" (Ministry of Finance 1996: 5) based on what has been termed 'export-led growth'. Supply-side measures, would have to be adopted to enable the appropriate development of key industries which could compete on the global market. These measures incorporate the state's active participation in enhancing industrial competitiveness, investment and job creation. One of GEAR's main aims is captured in the declaration that "trade and industrial policies aim to promote an outward-oriented industrial economy, integrated into the regional and global environment and fully responsive to market trends and opportunities" (1996:6).

Through the acceptance of GEAR, which was presented as non-negotiable (Marais, 1996), the government has embarked on an economic development path which clearly favours growth over equality. Thus, the unstable equilibrium between equality and growth visible in the RDPWP has been resolved in favour of growth. It has relegated the issue of social equality to one of being contingent upon the economy's ability to grow and thereby fund the redressing and rebuilding of a highly unequal society. To attain fiscal targets consumption spending (spending on social services) would have to be reduced (Ministry of Finance 1996: 10). This would mean that areas such as health, education and welfare would be subjected to cuts. A government less committed to social welfare provision reminiscent of many industrial countries would become a reality in South Africa, making global influences very visible and active in shaping public life. The difference between these countries and developing countries such as South Africa is the latter's much higher level of social inequality. Cutting social spending would result in deepening the poverty cycle in South Africa.

Economic practice over the last two years showed that many of GEAR's assumptions are flawed. Instead of growing at its projected 4 to 6 percent per annum (Ministry of Finance 1996: 2), growth has been 3,1 percent in 1996 and 2,5 percent in 1997 (Heintz 1997: 33). To compound matters, instead of the projected 126 000 new jobs in 1996 and 252 000 new jobs by the end of 1997 (Ministry of Finance 1996: 12), the economy shed 71 000 jobs during 1996 and 42 000 jobs in the first quarter of 1997[62]. This phenomenon has been termed 'jobless growth', i.e. a growing economy without the expected concomitant increase in jobs. The question that this raises is whether the GEAR strategy, while planning for increased levels of employment, actually leads to greater unemployment. The phenomenon of jobless growth is the outcome of "increasing capital intensity in manufacturing and the stagnation of the domestic industries exposed to external competition" (Osborn 1997: 29). Automated technology is used in the manufacturing industry in order to enhance production quality, but has negative consequences for employment levels. An increase in economic growth based on export of quality products might result, but not an increase in employment. Moreover, many jobs are being shed by uncompetitive companies that are forced to downsize or close down. Instead of GEAR's projected increase in both growth and employment the phenomenon of jobless growth has begun to manifest[63].

Steps that have been taken to abolish exchange control and promote trade liberalisation to encourage foreign investment have already begun to have pernicious effects on the economy. For example, the clothing industry has had to downsize rapidly in the face of stiff competition from clothing importation which is much cheaper and of a better quality. No steps have been taken to protect industries that are suffering decline. Thus, lowering import tariffs can increase competition and help reduce manufacturing prices, but there is already substantial evidence that jobs have been lost as a result (see Archer 1997: 41-44).

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[62]. These figures are gleaned from the Central Statistics Service's estimates and quoted in Heintz (1997: 33). The figures do not account for the amount of jobs that might have been created in the informal industry. The accuracy of jobloss figures has been questioned, but it is generally assumed that jobloss has been severe.

[63]. The economic meltdown of countries in South East Asia during 1998 has impacted negatively on the South African economy. Growth rates have fallen and none of the other projections made by GEAR has been achieved. While GEAR had failed to achieve its targets the government has recommitted itself to the main tenets of this policy (Marais 1998: 160-169).

One of the principal contradictory features inherent in GEAR lies in its implicit choice of post fordism as economic model. This is in line with GEAR's preference to build the economy on the basis of export-led growth which requires a manufacturing industry that can produce quality goods for global markets. A post fordist economic model, it is argued, can provide a framework to achieve qualitatively enhanced production. As a new form of work organisation, post fordism requires the complete reorganisation of the economy in order to achieve production flexibility necessary to achieve enhanced levels of production quality. Post fordism is driven by the rapid advance in computer automation and information technology (Harvey 1989: 192). It promotes the development of a "highly trained and multi-skilled innovative workforce to make South Africa's industries competitive" (De Clerq 1997: 158). The success of post fordism is dependent upon a country's ability to develop a high quality human resources development programme (Kraak 1991: 45).

However, the merits of post fordism as a basis for economic development in South Africa have been brought into question. Internationally this form of economic organisation is limited to a small number of industrial and newly industrialising countries. Post fordism is limited to relatively small sectors of these countries' economies. Nattrass argues that "post fordism is a long way away because fordist methods of work organisation and production continue to thrive in the majority of the world economic sectors" (quoted in De Clerq 1997: 153). South Africa has a powerful, but relatively small industrial and manufacturing sector, an enormous mining sector and an agricultural sector. The country exports primary products and imports most capital goods. South Africa's economy has been described as 'racial fordist' or 'peripheral fordist' (Kraak 1991: 46), which refers to the country's highly uneven economic development. This begs the question whether the economy is suited to make the transition to post fordism. Hinson (1990: 4), an economist, suggests that the economy first has to become properly fordist. It is therefore unlikely that the South African economy with its presently subordinated position in the world market can develop, as GEAR suggests, a highly competitive economy able to compete with other industrial countries. While GEAR adopts supply-side measures to facilitate economic adjustment, it is feared that the managerial and non-interfering role it expects the state to play will impede this type of adjustment. The model of economic development through growth suggested by the GEAR strategy, I believe, is untenable. Many internal contradictions have begun to manifest in its implementation. It is achieving neither its projected growth rate nor the creation of employment. The simplistic assumptions inherent in the shift to post fordism as the preferred economic model do not take into account the nature of the structural constraints inherent in the economy. The type of economic development envisaged by GEAR would thus not be achieved.

More importantly, the main weakness of GEAR's economic framework is the route it proposes to take to achieve economic growth[64]. It asserts that growth would be achieved on the basis of a massive increase in private sector investment which would be attained by implementing a number of investor friendly measures including: decreasing the budget deficit by slashing state spending, keeping inflation in single digits, reducing corporate taxes and providing tax holidays, gradually phasing out exchange control regulations, encouraging wage restraints, creating a flexible labour market, and speeding up privatisation. The strategy places economic recovery onto the shoulders of the private sector. The private sector would be expected to form strategic partnerships with the public sector (which would be subjected to privatisation) which would enable a more efficient delivery of social services while, simultaneously, trimming state expenditure (Ministry of Finance 1996: 4-9). The National Institute for Economic Policy warned that "the projected growth rate is almost completely dependent upon the rapid success of government policy in stimulating private investment" (NIEP 1996: 12).

In order to stimulate private investment GEAR proposes vigorous fiscal deficit reduction targets It aims to reduce the deficit to an annual average of 3 percent which would lead to lower interest rates, boost investor confidence and trigger a dramatic rise in private investment (Ministry of Finance 1996:6). There is a need for a developing country such as South Africa with a sizeable debt to reduce its debt burden, which a low fiscal deficit would achieve. Making a successful entry into the global economy requires economic policy that gives investors confidence about the profitability of their investments. Strict fiscal discipline is regarded as a sign of an investor-friendly environment. GEAR supports the view that private investment is a direct function of investor confidence which is mainly achieved through reducing the fiscal deficit.

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[64]. This is not to downplay other weaknesses in GEAR's economic assumptions especially with regard to job creation and taxation.

However, problems would arise when cutting state spending is viewed as the principal means of reducing the deficit. This would undermine the necessity for there to be "complementarity between investment by the state and private sector" (Marais: 164). The National Institute for Economic Planning has reminded that, internationally, greater attention has been paid to the role of spending on public infrastructure (roads, transportation and housing) and social services expenditure (education, health care and welfare) in promoting a country's economic growth, but also in encouraging private investment (NIEP 1996: 8). On this approach public expenditure "'crowds in' private investment by helping to create a structural bedrock for sustainable growth" (1996: 8), which a reduction in state spending as proposed by GEAR would undermine. Other than a number of sequential events initiated by a reduction in the fiscal deficit, GEAR proposes no coherent strategy to attract investment. Cargill notes that the central pillar of GEAR's approach to economic growth rests on "a leap of faith that a reduced deficit would spur private investment to dramatic levels" (in Business Map Update 1997). This is unlikely to occur because of the negative financial consequences of following a very tight fiscal reduction policy which is to reduce state spending on infrastructure and social welfare. As suggested above, a complementarity between public and public sector investment in laying a solid foundation for economic growth would not be achieved. In such a context it is highly unlikely that an increase in private investment will take place, which in turn would mean that economic growth would not be forthcoming.

Through GEAR the South African government has opted for a precarious growth path, one which tries to integrate its economy into the global market through export-led growth, but which offers very little protection and regulation for the internal cohesion of a susceptible economy. South Africa, as all other LDCs, has had no option other than to seek entry into the global economy. This has placed a tight set of restrictions (see 2.5) on the government's ability to regulate economic development, which, together with the complexity of governance, has had a constraining impact on macro socioeconomic policy.

In sum, I have shown how the narrowing of the socioeconomic development agenda has been achieved by focusing on the RDP base document, the RDP White Paper and the GEAR strategy. An equality-based development discourse occupied centre stage prior to the 1994 election. An increasing ambivalence crept into the policy positions of the GNU after the election. Government policy manifested as an uneasy balance between equality and growth. The narrowing of the policy agenda has been achieved through GEAR's preference for growth as the conceptual pivot of state policy. The education policy development trajectory has to be evaluated in relation to this constricting framework.

4.5 "Narrowing" of the education policy agenda

Education policy between 1994 and 1997 has to be understood in terms of the constricting transitional context, and the consolidation of a conservative socioeconomic policy environment. Education policy has shown a concomitant narrowing trajectory to that of broader socioeconomic policy. The government's macroeconomic framework forms the policy backdrop against which education policy was formulated. This section provides an analysis of the narrowing education policy agenda from just before the 1994 election until mid-1997. Policy narrowing, I contend, is the main feature in terms of which education in this period has to be understood.

I discuss the policy vision embedded in the first White Paper on Education and Training (DoE 1995a, February 1995, hereinafter referred to as the WPET) and its antecedent policy documents. I provide an outline of the main proposals made by the WPET and consider the extent to which the policy vision it favours has shifted from the ANC's education policy document entitled 'A Policy Framework for Education and Training' (African National Congress 1994b), and the Draft White Paper published in September 1994. I argue that, similar to shifts in socioeconomic policy which I discussed above, the WPET also embodies a significant departure from earlier, more radical policy pronouncements. This is notwithstanding the WPET's comprehensive focus on the restructuring of education and training. I then proceed to analyse the extent to which policy narrowing has manifested in the most important education policy issue that has emerged during the last few years, i.e. proposals for the integration of education and training.

4.5.1 The genesis of the White Paper on Education and Training

The White Paper on Education and Training (DoE 1995a) was published in February 1995 after a long process of public hearings and consultation on the content of the draft White Paper on Education and Training (DoE 1994, hereinafter referred to as draft WPET) which was published in September 1994. The education sector displayed impatience with the Education Ministry's inability to give any clear direction of its policy vision in the first months after the election in April 1994. This policy silence was attributed to the leadership style of Prof Bengu as Education Minister as well as the late appointment by him of his Director-General. Sayed provides a more convincing explanation:

> ... the lack of policy development was partly a consequence of the negotiated settlement ... which necessitated protracted negotiation before senior level appointments could be made and acts passed. ... policy development was, of necessity, slow in order to facilitate reconciliation and ensure that no radical policy acts were promulgated which would cause immediate political anxiety and uncertainty (1997: 723).

Another important factor in understanding the reason for the policy hiatus is the impact the rising Africanist tendency in the Ministry had in marginalising non-African persons from leadership positions (Weekly Mail/Guardian 2/6/1994). This partly explains the breakdown in continuity with democratic education policy makers prior to the election. Particularly, the researchers attached to the NEPI were sidelined. This had the effect of creating somewhat of a separation between education policy before the election and policy enacted afterwards. However, it might be that pre-election policy was ignored because it failed to make concrete proposals for implementation. NEPI, for example, concentrated on policy conceptualisations and options. Mary Metcalfe, the Minister of Education in Gauteng, commented in 1994 that "I do not feel concretely enlightened by the NEPI reports now that we have to run and change the existing system" (quoted in De

Clerq 1997a: 145).

The WPET had many and varied antecedent documents of which the draft WPET (DoE 1994) and the ANC's pre-election document entitled "A Policy Framework for Education and Training" (ANC 1994b, hereinafter referred to as APET) are the most prominent. These two documents constitute a major part of the genealogy of the WPET. Greenstein and Makwanazi comment that the APET document "marks the rise of the ANC and its allies to a hegemonic position in the education policy formulation process" (1994: 1). This position is based on the calculated expectation that the ANC would become the majority party in the GNU. ANC policy was developed by its Centre for Education Policy Development through a series of conferences and workshops that brought together a number of stakeholders and interest groups. The APET was framed within the parameters set by the NEPI document (NECC 1993a and 1993b) and the National Education Conference convened in 1992 by the NECC (Greenstein and Makwanazi 1994: 24).

The APET was formulated as an election document and should be read as complementary to the RDP base document, with a similar preference for an equality-led policy environment. Confirming its equality thrust the APET states as a primary goal "the reconciliation of liberty, equality and justice, so that citizens' freedom of choice is exercised within a social and national context of equality of opportunity and the redress of imbalances" (ANC 1994b: 4). The document favours a view of education which sees this as a part of "the pursuit of national reconstruction and development, transforming the institutions of society in the interest of all, and enabling the social, cultural, economic and political empowerment of all citizens" (ANC 1994b:4). APET proposes a framework for comprehensive restructuring of the education and training system. The major policy initiatives are: the integration of education and training, reconstructing the bureaucracy, restructuring school education, and curriculum change. Sectors targeted for fundamental reform include: early childhood development, adult basic education and training, special education, teacher education, higher education, and the provision of buildings and physical resources (ANC 1994b: 10-14).

The APET addresses the connection between education and economic growth. It places a strong emphasis on vocational training and technical skills and makes firm proposals for the integration of education and training to facilitate lifelong learning (ANC 1994b: 17-20). Concepts such as flexibility, recognition of prior learning and mobility indicate the desire to incorporate previously excluded people, particularly workers, into the education system. It also reflects a concern with developing an appropriate human resources development strategy to facilitate economic growth. The latter trend has become more prominent in the WPET.

The draft WPET was eventually published in September 1994. It represents the Education Ministry's first coherent policy statement about the direction of education restructuring. This vision is located in the framework of the RDP and specifically its HRD component. The draft WPET has a broad, comprehensive and historically sensitive conceptual approach to restructuring. It is unambiguous about establishing as a starting point the need to eradicate the legacy of apartheid education (DoE 1994: 9-10). This is unlike the WPET (DoE 1995a) which starts off by playing down this historical legacy through statements such as "South Africa's education system is the most developed and well-resourced system of education and training on the African continent" (DoE 1995a:18) and that it "compares well with other industrialising countries and seeks to match itself with the world's best" (DoE 1995: 18).

There were many submissions and responses to the draft WPET[65]. Those that received most prominence in the media, and which arguably had most influence in determining the outcome of the WPET, came from political parties to the right of the ANC. The National Party and Inkatha Freedom Party berated the Education Ministry for favouring strong central state control of education. They pointed out that centralism went against the dictates of the Interim Constitution which gave provinces a considerable amount of autonomy in the running of education (see The Citizen 23/9/94). The Democratic Party pointed to the silence of the draft WPET on the issue of how to achieve equity without lowering standards (Greenstein and Mabogoane 1994: 5). The Conservative Party slated the proposals as a recipe for leading to disruption and an alarming lowering of standards. This party called for the establishment of exclusive Afrikaner schools based on Christian principles.

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[65]. The Department of Education pointed out that over 600 submissions were received and that while it could not incorporate all the points raised it tried to "do justice to the spirit if not the letter of the massive public responses to the draft" (DoE 1995a: 14).

Responses from the left of the government came from, among others, the Centre for Education Policy Development (CEPD), the Education Policy Units (EPUs), the NECC and the South African Democratic Teachers Union (SADTU). In the main, they received the draft WPET favourably, welcoming the intention to make a decisive break with apartheid education and moving to tackle the fragmented, exclusionary and gender-biased educational legacy. Some of their main concerns were: the continued emphasis on formal schooling to the exclusion of non-formal learning and training; the tendency to shift funding for non-formal education away from the state; the lack of a clear statement of priorities and commitment of resources to effect meaningful change; and the absence of specific measures to achieve greater equality and the redistribution of resources (see Greenstein and Mabogoane 1994:4).

4.5.2 The WPET's policy proposals

The WPET locates the restructuring of education within a context of transforming the apartheid legacy based on the principles and values enshrined in the Interim Constitution. The WPET starts the description of this legacy by asserting the education system's superior quality relative to other countries on the African continent. It outlines the distorted educational development conditions to which most black people in South Africa have been exposed (DoE 1995a:18). Manifestations of inequality, according to the WPET are: segregated schooling, inferior quality for most, high illiteracy rates, poorly resourced school conditions and a chronic inadequacy in mathematics and science subjects (DoE 1995a: 18). The WPET advances a transformational mission which seeks to build a single non racial education system. The new education system would be based on a strong expression of human rights "so that all citizens irrespective of race, class, gender, creed or age, have the opportunity to develop their capacities and potential, and make their full contribution to the society" (DoE 1995a: 21). The right of parents to choose the form of their children's education is upheld as "as an inalienable right" (DoE 1995a: 21). This right to choose is extended to include language, religion and cultural expression. This provision was later to be used by communities to defend their educational privileges (see para 4.6.2.2).

Other values underwritten by the WPET are: the realisation of democracy, liberty, justice and peace and the encouragement of mutual respect for diversity. The education system is expected to counter the legacy of violence, teach skills for conflict resolution and management, and inculcate values of tolerance and cooperation. Sustainability of education programmes is a key operational principle, the attainment of which the WPET contends is secured when people can claim ownership of educational processes and practices. Productivity of the educational system is emphasised. In this regard the WPET states that "improving efficiency and productivity is essential in order to justify the cost of the system to the public" (DoE 1995a: 23).

A number of development initiatives is signalled which will be taken up either by establishing the appropriate state developmental and implementation committees and centres or through the appointment of investigative commissions. Some of the development initiatives are: curriculum development, the promotion of open learning through the National Open Learning Agency, an integrated approach to Education Support Services, the development of a teacher education system, and a student recovery programme in mathematics and science (DoE 1995a: 26-31). A number of commissions would be set up in order to investigate policy options in specific areas. Some of these commission would be in the following areas: Further Education and Training, Higher Education, Gender Equity, Learners with Special Needs and Early Childhood Development.

The WPET seeks to establish consonance with the Interim Constitution of 1993 and the constitutional provisions that were to be taken up by the Final Constitution completed in 1996. The WPET has had to give practical content to the Constitution's pronouncement of education as a fundamental right, the rights of children and the right to equality and nondiscrimination (DoE 1995a: 39-42). The education system has to be organised in terms of respect for and non-violation of the individual's freedom of religion, belief, opinion and expression in education. The WPET states that these constitutional requirements would have to be substantiated and translated into clear guidelines (DoE 1995a: 43). The potential problem that stares the Ministry in the face is that the Constitution could be used by cultural, language and race groups to maintain racial, class or religious exclusivity in public and private schools. Other constitutional rights which the WPET signal as a priority for policy making include labour relations, gender equity and the projection and advancement of human rights.

The most important policy pronouncement made by the WPET revolves around the integration of education and training. It envisages the complete integration of education and training. This will span the formal, non-formal and informal sector around the idea of lifelong learning. Integration is driven by the progressive aim of incorporating people who were excluded from the formal system into a more flexible and open system. Education under apartheid was dominated by a narrow and elitist academic orientation and a rigid and hierarchical system which disallowed mobility between the different learning contexts. The other very strong impulse underpinning integration is the concern to develop an appropriate HRD[66] component. The WPET envisages that integration will happen on the basis of a National Qualifications Framework (NQF). In the next section I provide an analysis of the NQF as it has manifested in a number of policy processes subsequent to the publication of the WPET, in which I consider the extent to which it is either dominated by a growth or equality conceptualisation. I favour the view that the integration of education and training, in its support of a growth-led conceptualisation which elevates the concerns of training above education, represents the narrowing of the education policy agenda between 1994 and 1997.

The WPET embodies what is termed in policy sociology a forward mapping approach (Elmore 1980:605). As an official policy statement by the Department of Education, the WPET places very strong emphasis on outlining an ideal vision to underpin education reform. It states that "the challenge the government faces is to create a system that will fulfil the vision to 'open the doors of learning and culture to all'" (DoE 1995a:17). The WPET states that "a priority for the national and provincial Ministries of Education is to create a transformative education system ... to help build a just, equitable, and high quality system for all citizens" (DoE 1995a: 18-19). Similar statements reflecting a strong ideal vision are strewn throughout the document. The document establishes a comprehensive, ambitious and complex policy framework.

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[66]. In my discussion below of the National Qualifications Framework I focus on the impact an HRD discourse has had in contributing to education policy narrowing (para 4.5.3).

The overarching goal of the WPET is to provide access to all to lifelong education and training of good quality. In order to achieve this goal the WPET initially (in the first 20 pages of the document) displays an unproblematised understanding of the specific interrelationship between the principles of equity, redress and quality. It states that in order to achieve an accessible open learning system purposeful strategies based on equity must be followed. These include the rehabilitation of schools, the restoration of community ownership of educational institutions and affirmative action. Thus, redress is here a pivotal feature in the eradication of educational inequalities (DoE 1995a: 21). However, a commitment to quality also features strongly but without due regard to the potential contradiction between equity and quality. The WPET states that "the improvement of the quality of education and training services is essential. ... quality is required across the board ... quality assurance mechanisms will be developed to ensure the success of the learning process" (DOE 1995a: 21). In a constrained financial environment and faced with enormous development challenges education policy cannot target equity and quality in an undifferentiated manner. Political choices have to be made about how these two principles stand in relation to each other. Often inevitable tradeoffs have to be made (see Wolpe 1992) among a number of priorities such as whether to increase state funding for primary schooling and decrease funding for higher education, or whether to have ten or eleven years of compulsory basic primary schooling. This undifferentiated relationship between equity and quality could be regarded as reflective of the WPET's inability to make hard choices among many priorities. It could be the result of a type of 'policy populism' which attempts to placate the demands to demonstrate improved living conditions by employing radical language, which, given the nature of the transition and the limiting financial framework, is unattainable in reality. Policy populism could be a reflection of what I elaborated on in Chapter Two, drawing on Weiler, as more about winning consent at the ideological level than about initiating real change in practice. As Weiler suggests, "as the modern state ... faces a chronic deficit of legitimacy, the recourse to the legitimating potential of symbolic action becomes an important strategy" (Weiler 1988:265).

A nuanced understanding of the relationship between quality and equity is portrayed in the final chapter which focuses on extending free and compulsory education to all (see DoE 1995a: 73-78). Here the WPET concentrates on the quantitative expansion of schooling to place South Africa's sizeable number of out-of-school million children into school[67]. It declares that "access without quality improvement in basic general education is a recipe for disappointment" (DoE 1995a: 74). The WPET favours a school expansion policy which phases in over a number of years the provision of free quality schooling, rather than rapid school expansion devoid of the qualitative dimension. A phasing-in approach to free and compulsory schooling is favoured in order to establish a quality schooling system. Thus, on the very crucial issue of the relationship between equity and quality the WPET displays two positions: 1) an undifferentiated one which fails to establish a clear framework for addressing different priorities, and 2) a nuanced one which tempers the populist notion that a transformed education system is achievable in a very short time span.

The WPET supports a much narrower understanding of basic education than what the Ministry pronounced in the draft WPET. In the latter document a commitment to 'basic education' includes adult education and early childhood education (DoE 1994: 12). But, the WPET prioritises the formal schooling system and specifically the commitment to phasing in ten years of free and compulsory education. No clear financial commitment is made to financing adult education. Adult education can only be seriously addressed if the government commits public money to this sector. Furthermore, while the WPET envisages a preschool reception year as part of the ten-year basic education phase, it states that this will initially only be provided where there is existing capacity and classrooms (DoE 1995a: 75). Thus, here even the commitment to ten years of primary education which includes a year for preschool is decreased to nine years. The watering down of the meaning given to basic education also has an impact on achieving the stated aim of developing life long learning as a cornerstone of the new education system. The lack of financial support for sectors other than formal schooling would endanger the achievement of a system that incorporates especially those who have been excluded from the formal system. This has led policy analysts like Chisholm and Motala (1994) and Christie (1997) to observe that the tendency to prioritise financially only formal education is a retrogressive step in that it fails to deal with the legacy of exclusion. However, a caution is necessary here. What these policy analysts do not confront is the necessity of having to prioritise among a long list of competing demands. The WPET prioritisation of formal education is in large part due to the financial constraints placed on the policy environment by a growth led development path.

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[67]. I analyse school access policy in Chapter Six.

The redistributive thrust is tempered in the WPET by a constrained financial environment. In line with the notion of fiscal discipline as a cornerstone of the favoured macroeconomic framework, the WPET does not support expansion of the educational portion of the budget. It favours internal budgetary reform along four dimensions (DoE 1995a: 62-63). Firstly, the budget has to move away from inequitable funding. Equity will be achieved through the equalisation of Teacher-Pupil Ratios and through addressing the skewed distribution of teachers which until now has meant that higher qualified and thus better paid teachers are in the privileged sector of the system. Secondly, spending on education has to be made more productive and cost effective. Thirdly, the introduction of user charges through voluntary contributions by parents is affirmed by the WPET, and fourthly, the WPET proposes new funding partnerships with international and local businesses and donor agencies. It is held that through these measures enough money will be generated to fund capital expenditure for the expansion of the education system.

However, a constrained budgetary approach based on strict fiscal discipline has had the effect of diminishing the attainment of many of the radical policy proposals that appeared in the APET and the draft WPET. While the language of the WPET remains radical, financial considerations have introduced a constricting influence. The WPET is thus an embodiment of two contradictory ideological tendencies which analysts have described as a competition between social democracy and neo-liberalism for the heart of education policy (see Mkwanazi-Twala, Mwiria and Greenstein 1995, Kallaway 1995, Christie 1997, Fataar 1997a and Kruss 1997). In the language of this thesis, the WPET represents an uneasy balance between equality and growth. This contradictory tension is consonant with the ambivalence manifested in the RDP White Paper. I will now focus on the development of the NQF which, having been developed in the context of GEAR, has shifted the educational discourse in the direction of a growth-led environment which would fail to transform the education system in the interests of all South Africa's people.

4.5.3 The National Qualifications Framework and a growth-led policy framework

In this section I discuss the NQF proposals. I hold that the imperatives that propelled the training part of the integration agenda marginalised the education dimension. While there is considerable debate about the efficacy of integrating two different pedagogical activities, the NQF, in bringing education and training together managed to impose a rigid pedagogical and assessment regime over the education system. The aim of the WPET has been to strive toward achieving an integrated system that would incorporate people whom the formal system have excluded. The subsequent development of the integration ideal into the NQF has sidelined the equality aim for a growth framework for which an amalgam of business and labour interests have been lobbying. The weakness of the WPET is that it only dealt with the form (i.e. the need for new structures) and not the content of integration. It is in developing the substance of the NQF that the training agenda trumped education.

Muller explains that:

> ... the NQF rests upon a twin-pronged argument, with an egalitarian strand and an epistemological strand. The egalitarian argument takes issue with the high exclusivity and selectivity of the present qualifications system which restricts both access and progress. ... The epistemological argument takes issue with the academic/vocational tracks of traditional education which is premised on a strong divide between mental and manual labour (Muller 1997a: 5).

According to Motala (1995), a former deputy director-general in the Gauteng Education Department and leading ANC educationist, the egalitarian argument starts from the premise that

> ... the principal purpose of integration and coherence in the education and training system is to meet the broad developmental goals of post apartheid South Africa. Inherent in these goals are the socio-political and cultural objectives we strive for in reconstructing our society. As regards economic issues, the goal addresses the question of the economy's growth through redistribution, while ensuring macroeconomic balance (Motala: 1995: 2).

Clearly viewing it as part of a redistributive agenda, Motala regards the integration of education and training as central to the successful attainment of development initiatives such as job creation, universal literacy and housing programmes (Motala: 1995: 2). He displays firm conviction in the ability of integration to achieve equality when he states that "a system of comparability between formal and non-formal education and training must be established, only in this way will a true culture of learning be created and permeate the whole society" (Motala: 1995: 3). Motala's remarks reveal a kind of triumphalism about the possibilities of restructuring that was still prevalent a year after the election. His views also display naivety about the genesis of the integration discourse. I briefly discuss the genesis of the integration discourse in order to point out how training has come to assume a hegemonic position in education policy (see para 4.5.4).

The NQF was developed in a ministerial working group appointed by the Ministries of Labour and Education. The Minister of Education is responsible to the cabinet for the implementation of the NQF. The objective of the NQF is to create an integrated national framework for the provision of lifelong learning based on nationally agreed qualification levels. The NQF aims to contribute to "the full personal development of each learner and the social and economic development of the nation at large" (DoE 1995a: 3). The South African Qualifications Authority (SAQA), a body that was proposed in the NQF legislation, has been charged with the responsibility to develop, implement and oversee the functioning of the NQF (DoE 1995a: 5). The objectives of the NQF as expressed in the National Qualifications Framework Bill (DoE 1995b) are to:

- create an integrated national framework for learning achievements;
- facilitate access to, and mobility, and progression within, education, training and career paths;
- enhance the quality of education and training;

- accelerate the redress of past unfair discrimination in education, training and employment opportunities; and
- contribute to the full personal development of each learner and the social and economic development of the nation at large (DoE 1995b: 2-3).

The influential Human Sciences Research Council (HSRC) publication, 'Ways of Seeing the NQF'[68] (HSRC 1995) provides a number of views in support of the NQF. It states that the new approach to learning acknowledges the assumption that all learning is for a purpose and that the NQF recognises that much learning takes place outside the formal delivery system. The publication argues that any form of learning should be in a position to be assessed against nationally acceptable standards, and recognition be given accordingly. It is of the view that the NQF helps us to consider learning from the learner's points of view. The move towards a learner-centred approach is thus sanctioned (HSRC 1995: 12).

The NQF proposes the dissolution of existing distinctions between pre-primary, primary, secondary and tertiary education sectors (DoE 1995a: 15). It collapses the boundaries between formal and informal education. In the place of the former fragmented and divided qualifications framework a system consisting of three bands containing a number of levels each is proposed. The General Education and Training level incorporates the compulsory schooling phase which ends at grade 9 and three adult basic education and training levels. Contrary to the exclusion of adult learning in the former framework, the NQF strives to enhance adult learning by incorporating it into the qualifications structure. The Further Education and Training level comprises the senior high school phase until grade 12. The general and career specific programmes offered in the college sector which includes community, intermediate and other private vocational and academic colleges and courses provided by NGOs would also be accredited on this level. Workplace training and programmes offered in training centres would also be incorporated into the Further Education and Training level. The Higher Education and Training level includes programmes offered by public and private professional colleges, technikons and universities.

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[68]. 'Ways of Seeing the NQF' (HSRC 1995) was developed by a group of people who worked under the National Training Strategy Initiative in the Ministry of Labour. This group had strong representation from a range of Training Boards, big businesses such as Eskom (electricity) and Spoornet (railways) and union representatives from COSATU. Some adult education non-governmental organisations were also represented (HSRC 1995: iv). The formal education sector was almost entirely excluded from developing important thinking on the NQF framework which framed the policy debate.

The NQF envisages multiple delivery sites in order to expand learning opportunities especially for people who are unable to study via the formal route. To this end learning in NGOs, private colleges, informal programmes and professional institutes are to be acknowledged and accredited. A qualification is built up of curricula or learning programmes which are developed based on unit standards registered with the NQF (Pretorius 1998: 6).

A cluster of new concepts has been introduced by the integration debate which, it is argued, would enable a flexible and open learning system. A scaffold-like picture is presented of a learning system that could be entered and exited at multiple points. The central idea is that the NQF could accommodate any learner, be she in a formal or informal setting, to start at any point on the qualifications structure and move through interconnected levels. This would give credence to popular NQF slogans such as 'from sweeper to engineer' and 'from porter to doctor' in that it would encourage the formalisation of a diverse range of learning and thereby enhance learner mobility. An important principle in widening access to excluded people is the 'Recognition of Prior Learning' (RPL) which refers to efforts to acknowledge, through certification, knowledge and skills acquired by people outside of any institutional learning context. The RPL principle is based on accrediting the knowledge acquired by people informally or through work experience, which would allow them to be slotted into specific NQF entry points. The NQF would facilitate greater articulation between the different sites and levels of learning in order to enhance the mobility of learners in the education system. The idea of unit standards in the development of programmes is central in achieving articulation. In order to gain status as an accredited programme all learning programmes, whether in formal or informal settings, would have to register its unit standards with SAQA.

The NQF envisages the establishment of thirty nine National Standards Bodies which would develop competency standards. A series of Education and Training Qualifications

Authorities and Qualifications Councils would monitor and audit the standards (Muller 1997a: p.8). All of these bodies will be placed under the control and oversight of SAQA. Unit standards will be developed in Standard Generating Bodies (SGBs). Any person, group or institution interested in developing a set of unit standards for a programme would have to approach SAQA to form an SGB. Thirteen National Standard Generating Boards (NSBs) would be established to oversee the work of the Standard Generating Bodies as well as to set standards for the NQF. The NSBs would decide which combination of unit standards is required for the awarding of a qualification. It is clear that the NQF requires a very complicated and cumbersome bureaucratic machinery. This would be difficult to set up and manage, given the rush to implement it, as well as the stringent financial situation in which the Education Ministry has to give effect to its ambitious plans.

The link between personal development and the socioeconomic development of the nation comes through very strongly in the motivating documents of the NQF. An integrated education and training framework is regarded as central to national development. The NQF ought thus to be evaluated in terms of its internal logic, i.e. whether its notion of learning and assessment is educationally plausible, but importantly too, integration has to be analysed in terms of whether it can play a leading role in overall development. In response to the latter dimension, a key question is whether the macro economic framework is able to provide a supportive framework which would enable the NQF to attain its ambitious goals. But, any analysis of the efficacy of the NQF must start with an understanding of the processes in terms of which it was developed. This will give us an understanding of the way in which the integration agenda became dominated by a growth-led conceptualisation. I now proceed with a brief analysis of the NQF by firstly focusing on the policy process. I follow this with an assessment of the internal pedagogical logic of the NQF. I argue that the preference for an Outcomes-based pedagogic mode is driven more by the need of training to demonstrate the acquisition of competencies which would sideline a broader, more open and democratic pedagogy. Finally, I assess the efficacy of the NQF in the context of the emerging political economy which I believe would give rise to a new mismatch between the 'world of work' and education.

4.5.4 The NQF and the policy process

The apartheid state had already recognised the mismatch between education and work as early as 1981 through the De Lange Commission. The formal education system did not provide students with generic or specific skills that would enable them to take up employment after school. One of the main recommendations made by De Lange was to vocationalise a large component of the schooling system. Despite the official rejection of the De Lange reports by the NP state, many of the proposals have been implemented in colleges and training schemes provided by business (Kallaway 1984: 28-32). The proposals formed the core of the 'Education Renewal Strategy' and 'Curriculum Model for South Africa' which were published by the Department of National Education in June and November 1991 respectively. Both of these documents focus exclusively on formal schooling. The more important document for establishing the antecedent influences on the NQF was the publication in 1989 of the 'National Training Strategy' (NTS) by the National Training Board (NTB) which were under the then Department of Manpower. All three of these documents called for the establishment of a single system of national qualifications in the non-formal sector as well as its articulation with the formal education system (Mohamed 1996: 26). The NTS proposed the establishment of national vocational qualifications which articulate with the formal education system within a unified Department of Education. The NTS accepts the market as a major regulating mechanism for the delivery of training.

These proposals were rejected by the Democratic Movement on the basis that it lacked a strong central regulatory thrust best provided by the state (NECC 1993a: 170-176). The ANC and COSATU proposed a human resources development approach that is part of an overall economic framework. It is envisaged that such a framework would be driven by a 'high- participation, high-skill' Vocational Education and Training System (NECC 1993a). While many of the features contained in the proposals conform to equity, the fear has been expressed that South Africa's very complex and unevenly developed economy would make the shift to a sophisticated HRD strategy problematic.

The NTB proposals and the ANC/COSATU proposals were divergent on a number of issues, but both identified the need to develop a coherent and integrated approach to education and training. Mohamed comments that by 1994 the "NTB, with the publication of its National Training Strategy Initiative (NTSI), made a sweeping paradigm shift" (Mohamed 1996: 28) in which the NTB called for the formation of a single Ministry of Education and Training and endorsed the idea of an NQF. The NQF was first mooted in the APET (1994) and IPET (1994), both ANC documents published just prior to the election. While the former apartheid state's proposals were inspired by a narrow market approach to HRD, and the Democratic Movement's approach by the demand for upskilling of workers in a system based on lifelong learning, both of these strands were brought together in the NTB during 1994. The influential 'Discussion Document on a National Training Strategy Initiative' (NTB April 1994) was developed in the NTB in which the interests of business and labour converged to give impetus to the integration of education and training. The education sector was thus completely sidelined. Needless to say, parents, teachers and students or organisations that represent them were never consulted in the conceptualisation of the NQF. It is in the context of this dominant training influence on integration thinking that the training agenda trumped education. De Clerq (1997b) notes that the NQF has been developed in an

> ... unpedagogical top-down technicist manner in which the NQF ... is likely to favour the already privileged institutions and create a dangerous political and bureaucratic control system that will delay the building of a high-quality, high skill system on a large scale (De Clerq 1997b: 140).

As a key stakeholder in the NTB, business's anxiety to develop an integrated education and training system is driven by the "concern about economic growth and highlighted the issue of global economic competitiveness, they placed particular emphasis on the need to improve productivity through worker training" (HSRC 1995: 36). This statement is from the 'Ways of Seeing the NQF' document, the co-authorship of which included business. The same document, which was also co-authored by labour representatives, states that "labour concerns (driven by COSATU representatives) revolved around the need for employment security and employment growth for their members, as well as the need for progression or career paths that would be opened up by access to education, training and development opportunities" (HSRC 1995: 36). While business and labour have different motivations for supporting the integration agenda, their concurrence on the importance of the NQF has given rise to a powerful lobby in shaping the direction of the NQF.

An important consideration in understanding the conceptual underpinnings of the NQF is the role international influences have played. Key Australian trade unionists[69] had assisted COSATU in developing its approach to HRD (Mohamed 1996: 33), members of the NTB went on study trips abroad and policy developed by the ANC's Centre for Education Policy Development was considerably influenced by the British Institute of Public Policy Research. The integration agenda was cultivated amidst the abiding quest for developing a globally competitive economic environment which, it is argued, requires a sophisticated HRD programme.

4.5.5 Questioning the pedagogical logic of the NQF

In this section I consider whether articulation between the different sites of learning, i.e. learning taking place in education and learning taking place in training, can be achieved. The dilemma that articulation faces is brought on by trying to marry two different assessment techniques that operate in these two different sites of learning. Training is based on the acquisition of competences which the trainee must be able to demonstrate at the end of a learning activity or block. Thus, skills-based learning can only be successful if learners can concretely show that they have acquired the stipulated skills and competences. Education employs an open-ended assessment process in which the acquisition of knowledge is experimental and developmental. Unless a completely closed conception of knowledge is adopted in education which is based on rote-learning and imbibing of pre-packaged content, the educational terrain favours a conceptually different pedagogy than training. Pedagogy and assessment in education is driven by the desire to create competent, enquiring critically minded persons (see van den Bergh 1994).

However, in striving to achieve articulation the NQF declared equivalence between the education and training. As a result of an unproblematised notion of the pedagogical difference between education and training, the NQF has imposed a training assessment regime onto education which would tend to distort educational pedagogy. The 'Ways of Seeing the NQF' (HSRC 1995) document acknowledges the concerns of 'education-minded' stakeholders in commenting that "they were concerned about the power issue of whose standards would be used to determine competence" (HSRC 1995:37) and that they (educationists) "feared that if education were to become the handmaiden of the economy, loss of curriculum autonomy would result" (HSRC 1995: 37). Despite this acknowledgement the training agenda has been firmly entrenched with the introduction in 1997 of 'Curriculum 2005'[70] which favours an Outcomes-based pedagogical approach.

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[69]. Mohamed points out that two Australian trade unionists, Chris Lloyd and Alistair Machin, advised COSATU on training policy (1996: 33).

The incorporation of an Outcomes-based approach represents the final stage in the narrowing of the educational agenda that occurred from 1994 to 1997. The document entitled 'Outcomes-based Education in South Africa' published by the Department of Education in March 1997 confidently declares that Outcomes-based education (OBE) is nothing less than a "paradigm shift" (DoE 1997a:6). In the introduction of the Curriculum 2005 document it is stated that OBE "aims not only to increase the general knowledge of the learners, but to develop their skills, critical thinking, attitudes and understanding" (DoE 1997b: 8). Furthermore, the Department of Education declared that "Outcomes-based education is learner-centred, results oriented design, based on the belief that all individuals can learn" (DoE 1997a: 17) and that it "provides a richly textured learning opportunity for the learner and an enabling facilitative role for the educator since the onus for lifelong learning development rests with the learner primarily in achieving the stated outcomes" (DoE 1997a: 22-23).

Contrary to the above claims, I am of the opinion that OBE reflects a narrow pedagogical approach which undermines a broader open-ended pedagogy. The OBE approach is a hybrid pedagogical model that has been constituted in processes around the development by an inter-ministerial working group of the 'Curriculum Framework for Education in South Africa' (DoE 1995g). On the one hand, critical pedagogical concepts such as nation-building, learner-centredness, flexibility, empowerment, participation, critical thinking and creativity (see DoE 1997b) appear throughout in the curriculum documents. On the other hand, a training pedagogy based on uniform standards and outcomes provides the substantive pedagogical meaning that underpins OBE.

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[70]. I now briefly describe Outcomes-based education (OBE) in order to present the view that it issues into a narrow pedagogy which is reflective of macro education policy narrowing. I give a more expansive critique of OBE in Chapter Five which focuses on 'Curriculum 2005'.

Kraak (1998) contends that this use of People's Education concepts is aimed at gaining acceptability and credibility for and hide from view an essentially technicist pedagogy. He claims that OBE is the result of a complex amalgam of a number of pedagogical influences, and that while it employs a radical People's Education legitimating language, it reflects in substance a technicist pedagogy (1998: 14). While not disputing the possibility of such political manipulation, OBE, as a hybrid model, has its pedagogical roots in both emancipatory child-centred pedagogy and instrumentalism. OBE's allure for policy makers is its promise of a curriculum approach based on measurable results, which ordinary people (consumers) finds attractive. OBE has been very compelling in industrial countries where cynicism has crept in about the efficacy of emancipatory learning. OBE's popularity in policy circles has to be seen in the light of 'demands' by citizens, workers and industrialists for an education system that can produce skilled persons who are able to function effectively in the competitive global environment. In South Africa, with its schooling system largely having been unable to produce literate and skilled persons, OBE could be regarded as a much more attractive option in promising a concrete level of educational achievement that has close linkages with the world of work.

However, despite its populist dimension, OBE has its substantive roots in industry training where trainees are required to demonstrate the concrete achievement of skills acquired in the learning process (see HSRC 1996: 2-17). The success of industry training depends on the demonstration of such skills and competencies[71]. Uniform unit standards have to be developed to put in place a system-wide training framework. The question of who develops these outcomes is crucial. The Department of Education's approach was to have stakeholders, through an inordinate number of committees and structures, determine the outcomes. The teacher is expected to develop lesson plans and employ a facilitative approach to achieve these generic and specific outcomes (see Chapter Five for an analysis of the way in which the outcomes were developed). However, while specific outcomes are conducive to training contexts (Kraak 1998: 26-28), learning in other educational settings such as schools is done on the basis of an open-ended and enquiring approach. In criticising an outcomes approach, Ashworth and Saxton point out that "there is no place in such a schema for imagination, creativity and innovation qualities that cannot be measured in discrete and quantifiable units, but which are the key priorities of a good quality education" (1990: 11).

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[71]. 'Competencies' was the concept favoured by the industrial training lobby before it was replaced in 1995 by 'outcomes'. This was in response to charges that competency language is very narrow and uneducational. 'Outcomes' could not escape similar technicist labeling.

In favouring an OBE pedagogical approach, the NQF as the main pivot around which education policy development revolves, represents a watermark in the narrowing of the education reform vision in South Africa. This narrowing has occurred over the last decade and had taken definite shape by 1997. In the final section of my analysis of the NQF, I will briefly discuss the dissonance between the NQF and the emerging neo-liberal political economy. I argue that the integration of education and training is untenable because of the inability of the macroeconomic framework to provide a sustainable basis for its (integration) development.

4.5.6 Dissonance between the NQF and South Africa's emerging political economy

In the preceding section I focused on the pedagogical logic internal of the NQF. I argued that the NQF collapses pedagogical distinctions inherent in education and training and that it consequently adopts a training based pedagogical model which marginalises education. In this section I focus on the external relationship between the NQF and the emerging political economy. Government policy assumes that the success of the integration of education and training is contingent upon the emergence and development of a successful macroeconomic framework. I contend that because the government's favoured macroeconomic framework is unattainable, the NQF will not succeed in achieving its goal of developing a closer linkage between education and the economy. Instead, the relationship between education and socioeconomic development will have a close resemblance to the flawed human capital position in terms of which socioeconomic development is supposed to be contingent on the 'productive' role of education.

I contend that both GEAR and the NQF support a growth-led conception of development. The reform vision inherent in both education and macroeconomic change is remarkably similar. Both areas displayed considerable policy narrowing over the last few years. GEAR established a macroeconomic framework with the primary objective of developing an export-led economy that is able to compete internationally. Economic restructuring would occur along post fordist lines. The government declared GEAR as non-negotiable. Education policy, in support of this economic model, advances a complex integrated framework in pursuit of an HRD strategy which would produce the required forms of labour for a new economic environment. Thus, policy suggests that a radically transformed education and training system organised on the basis of the NQF, is a fundamental requirement that would determine the success of the new economic growth path.

However, the projected relationship between GEAR and the NQF in the pursuit of growth-led development is untenable. The rationales of both these policy frameworks are internally inconsistent. GEAR will not achieve its projected growth path, nor will the NQF succeed in establishing a qualitatively enhanced integrated education and training system. As a result of the unsustainability of GEAR and the NQF the contingent relationship between the two will not be achieved. As I have argued above, GEAR's expectation that South Africa will develop a sophisticated post fordist economy is optimistic if not completely unrealistic given the uneven nature of the current economic system. Most sectors in our economy are not in a position to redirect themselves to compete internationally. In fact, GEAR policy, specifically its prescriptions on trade liberalisation, has already caused the downscaling of many of South Africa's manufacturing industries. A signal of GEAR's failure is the phenomenon of jobless growth currently experienced. This is contrary to the vast increases in employment that was projected by the GEAR strategy (see para 4.4.3). GEAR's main weakness is its dependence on private investment as the principal mechanism to achieve economic growth which it holds can only be achieved by decreasing the fiscal deficit. As I have indicated earlier, this would have the effect of drastically curtailing public expenditure on capital projects and social welfare. GEAR has made increases in funding for such expenditure contingent on economic growth (Ministry of Finance 1996: 12). However, in the meantime decreases in public expenditure would impede the emergence of private - public sector partnerships that would provide a necessary basis for attracting greater investment. This would render GEAR's strategy for economic growth unworkable.

Instead of facilitating the GEAR strategy, the NQF would have to function outside of the economic environment of which it was held up to be a major part. A high skill HRD strategy can only be sustained if the economy is geared to producing enough high skill employment opportunities. If there is no demand for this type of employment the need for sophisticated training will recede. In such a context the development of a high-skill HRD strategy will face difficulty. Where high-skill HRD training does develop it could create a new mismatch between education and the economy. In the 1970s and 1980s a mismatch was caused by an education system that was not producing enough semiskilled labour for the growing industrial sector (Kallaway 1984: 14-18). The De Lange commission therefore proposed vocational training as a means of producing the required labour and thereby attempt to resolve the mismatch. However, I would suggest that the new mismatch would emerge in the context of a high-skill HRD strategy but with an economy that is unable to develop a sophisticated export-led economy. This might result in an overproduction of highly skilled workers who will find it difficult to be employed in an economy that will remain low-skill based. This is clearly an illustration of the untenability of a reform vision that places the development of an education and training system ahead of a tenable overall socioeconomic development plan[72].

In sum, the government's choice of macroeconomic framework and education model represents a narrowing of the policy agenda in South Africa. My view is that this narrowing, while experiencing ineffectual contestation from time to time, has been concretized by mid-1997. The current policy position will not put South Africa on a sustainable development path. In addition, the development model that has been adopted will not achieve greater equality in resource distribution. Education policy analysis between 1994 and 1997 must be understood against the backdrop of a narrowing socioeconomic and educational agenda. I now turn to an analysis of the link between the education policy formulation process and the eventual policy meanings that have become embedded in education policy made between 1994 and 1997.

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[72]. Kraak (1994: 34) makes a similar point when he warns that lifelong learning creates the impression that it will lead to 'lifelong occupational mobility'. He argues that all economic systems require a hierarchical division of labour so that upward mobility in the workplace is determined by selection which is unfair and exclusive.Lifelong learning will thus not automatically translate into lifelong occupational mobility.

4.6 The policy process and education policy meanings[73]

Education policy in South Africa was the outcome of very complex policy processes (De Clerq, 1997). The simplistic and formulaic language that characterises policy documents hides from view the policy contestations that underpin policy making. Whereas policy embodies the state's attempt to allocate authoritative values (Prunty 1985: 134) in the public domain, the state does not make policy outside a context of influence (Bowe and Ball 1992: 19). Many contradictory social forces attempt to sway policy in their favour. The state has the dual challenge of 1) mediating between these contending forces, while 2) it has to pronounce decisively on its favoured policy vision. This section focuses on the relationship between the policy making process and the policy positions that eventually gets legitimated in state policy. This, I believe, forms an essential part of developing a macro analytical framework for understanding education policy in that it focuses on how specific policy meanings have become embedded in education policy made between April 1994 and mid-1997. It concentrates on the social processes that have constituted the policy process. I argue that policy has been constituted in the context of a powerful right wing lobby which has eclipsed a dwindling progressive civil society in the period.

While the state is not a neutral arbiter or mediator between competing interests, state policy is made within the context of pressures brought to bear by fierce lobbying from different groups and, pressure from the popular media. But as Urry (1981) suggests "the state itself is to be seen as actively seeking to establish and sustain a particular constellation of forces" (1981: 102). Dale (1982) expands on the functions of the state in capitalist societies thus: "the state must ultimately reproduce a particular set of social relations, including relations of production, because the revenue that sustains its operation depends in part (via taxation) on the accumulation of surplus value" (1982:135). Contradictory pressure is brought to bear on the capitalist state by it (the state) having on the one hand to guarantee the context for continued capital accumulation, while on the other hand having to reproduce the appropriate social relations to facilitate such expansion.

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[73]. This section draws on the conceptual work I have done in Chapter Two, specifically with regard to the section on 'Education Policy-Making' (see para 2.6).

4.6.1 Policy making and the structural level[74]

The choice of GEAR as macroeconomic framework entrenched a growth-led development path with the aim of turning South Africa into a globally competitive economic player. South Africa's political economy is being geared to develop along post fordist capitalist lines which, it is argued, is the only model for economic success. As in other countries in the south, this globally determined economic imperative is a fundamental principle in the organisation of South African public life. A growth-led development perspective, however, has pernicious social consequences, the most important of which is the trend to drastically downscale public spending. Vital social services such as social welfare, public health and education suffer from budgetary reprioritisation and cuts. In a country such as South Africa which is faced with enormous challenges to provide expanded access to social provisions, the effects of the culture of cuts have been deleterious. The test of any development path in countries undergoing major change is whether such a path is able to unify people around providing an equitable quality of life. As Gelb et al. ask: "is socioeconomic development based on a

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[74]. As an analysis of the direction of macro-economic policy constitutes large parts of the previous sections of this chapter, I will here only provide a few summative paragraphs on the nature of an emerging political economy in South Africa in order to locate the structural level of policy to which Ball refers.

'two-nation'[75] as opposed to a 'one-nation' strategy?" (quoted in Tikly 1997: 180). South African development policy is based on a two-nations development model which will fail to bring meaningful change to an expectant polity.

The emerging structural political economy of South Africa delimited a constricted and financially austere environment for the formulation of education policy. A narrow macro education policy framework thus matched a narrow economic framework. In the next level of analysis (political) I discuss the politically contested processes that characterised the three years of policy making and which had a decisive impact on shaping education policy.

4.6.2 Policy making and the political level

This analytical level concentrates on political and policy contestation by the divergent interests in civil society over education policy. Those groups in civil society who are most organised and can give their policy positions most prominence often have greatest sway in policy formulation. Central in understanding education policy contestation is the nature of civil society that characterised the period after 1994. I discuss policy contestation in relation to the following issues: 1) the reconstitution of civil society which saw the marginalisation of a progressive civic culture and 2) the link between a moderate constitutional framework, bureaucratic inertia and lobbying by political conservatives. With regard to the second issue, I will highlight the role globalising influences played in education policy narrowing.

4.6.2.1 Reconstitution of educational civil society

An understanding of the interaction between civil society and education policy in South Africa has to start from the 'state / people' dichotomy that characterised the educational terrain during the 1980s when apartheid education increasingly became the target of radical critique by democratic educational movements. Educational struggles were aimed at undermining state rule in the educational sphere and was part of a general anti-apartheid protest discourse as illustrated by the popular slogan 'People's Education for People's Power' (see Hyslop 1990: 85-86). Organisations such as the South African National Students Congress and the Azanian Student Movement (tertiary institutions), the Congress of South African Students and the Pan Africanist Students Organisation (school students) and the Western Cape Teachers Union (teachers) each mobilised people to oppose the apartheid state in their respective operational spheres. These mass organisations concentrated on opposing racial capitalism and canvassing for the overthrow of the state. Educational movements in the 1980s focused to a much lesser degree on issues of change internal to education. As a popularly supported radical educational discourse, People's Education succeeded in challenging and discrediting apartheid education at the political level. It did not, nor did it aim to, provide a fully considered perspective on educational restructuring. People's Education, however, firmly put in place expectations of a radical transformative educational agenda[76]. The NECC[77], established at the end of 1985, became the organisational vehicle most closely associated with this radical agenda. Concrete education policy development was not forthcoming out of this agenda.

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[75]. 'Two nation' refers to two societies with different levels of development within one country, one with first world standards and the other beset by poverty and inequality.

The political terrain and civil society's interaction with it began to undergo change during the 1990s. Political liberalisation caught the progressive education organisations off guard. The apartheid state began to make education policy pronouncements through the release in 1991 of the 'Curriculum Model for South Africa' and the 'Education Renewal Strategy' (DoE 1991). With the release of its documents the apartheid state occupied a key position in the educational terrain from where they could engage education

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[76]. For an account of the conceptual genesis of People's Education see Kruss (1987).

[77]. The NECC was established at the end of 1985. The forerunner of the NECC was the Soweto Parents Crisis Committee who identified the need for a coordinated effort to lead educational protest. The NECC gave excellent leadership in education, it developed a range of educational resources and provided fora for discussion around the democratisation of education. Many NECC leaders spent years in detention which by the end of the 1980s had crippled the organisation (Muller 1987).

discourse[78]. The democratic organisations were faced with the challenge of developing alternative education policy positions to counter the apartheid state in the realm of educational politics.

Progressive repositioning in education during the early 1990s occurred around a number of developments. This involved the move away from a radical politics of education to the more sobering and pragmatic world of policy making. The first concrete step that signalled engagement with the new policy terrain was an education delegation that met the apartheid state twice between February 1991 and March 1992 to press for steps to address the ongoing education crisis. The delegation was led by Nelson Mandela and included a wide-ranging group of representatives from progressive civil society[79]. The demands of the delegation went around the need for the apartheid state to acknowledge the crisis and take pro-active steps to resolve it. Of more long term importance, was that the delegation presented the apartheid state with the challenge to lay the groundwork for the removal of race-based educational structures and the establishment of one united education system. Crucially, the delegation pushed the apartheid state to postpone all new policy initiatives and restructuring (Metcalfe et al. 1992: 107-112). This was partly an attempt by the progressive educational movement to forestall changes by the apartheid state in order to buy time to develop its own competing education policy framework. A progressive education policy discourse was needed to counter the largely technicist and conservative policy framework embedded in the apartheid state's policy positions. The delegation's work culminated in the important National Education Conference held in March 1992 in Broederstroom. The conference was attended by a wide-ranging number of organisations and aimed to "develop strategies for resolving the crisis in education and to identify the framework for the restructuring of the education system" (Metcalfe et al. 1992:112).

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[78]. See Chapter Three (para 3.5) for an analysis of competing education policy discourses between the apartheid state and the democratic movement.

[79]. Some of the organisations and educational institutions included in the delegation were: the ANC, South African Democratic Teachers Union, Kangwane Education Department, Council for Black Education and Research, South African Communist Party, World Conference on Religion and Peace, Azanian Peoples Organisation, NECC and the South African Council of Churches (Metcalfe et al. 1992).

The conference endorsed negotiation between the progressive educational forces and the apartheid state as a viable method of struggle to address the education crisis and the longer term transformation of education (Metcalfe et al. 1992: 116). In order to retain a radical edge negotiation was portrayed as part of an arsenal of struggle tactics to be employed in tandem with mass-based pressure campaigns that would advocate for educational change. However, the shifting political terrain during the 1990s presented the democratic movement with a considerable challenge in finding an appropriate politics to engage the apartheid state on the educational terrain without having to relinquish the radical thrust of People's Education. In so far as the democratic movement adopted a stance of interaction with the apartheid state around addressing the educational crisis, it managed to challenge the state's unilateral restructuring of education. But, in so doing it entered a terrain of negotiation that was characterised by a circumscribed political context and a narrowing state educational discourse. The democratic educational groups now had to translate their demands for educational transformation into concrete policy positions within a negotiation framework which tended to sideline radical positions and the more left-wing sectors of civil society.

The demobilisation of progressive educational civil society is illustrated by the establishment and functioning of the National Education and Training Forum (NETF). The NETF which was established by the apartheid state in August 1993 came about as the result of a long period of intense lobbying by progressive organisations led by the NECC, and fervent battles by students and teachers[80] (Chisholm and Kgobe 1993: 13-14).

However, the NETF, through the introduction of broad stakeholder participation, became an ineffectual body with too many divergent interests which rendered it incapable of making coherent decisions. Stakeholders included representation from business, labour, private educational institutions, homeland education departments and other state bureaucratic structures. While the NETF[81] had long term restructuring aims most of its work went around resolving immediate crises. It faced problems with regard to organisational capacity, convoluted decision-making procedures, and slow processes of change (Greenstein and Makwanazi 1994: 17). As an initiative of progressive organisations, the NETF succeeded in limiting unilateral action by the apartheid state which would have amounted to restructuring education in favour of conservative interests before a new government comes into power. However, contrary to Badat's (1997:19) claim that the NETF represented a potentially important mechanism for democratic participation, as a body that was constituted by a divergent set of stakeholders it did not succeed in decisively influencing education policy in the direction of addressing transformational demands in education. The eventual demise of the NETF in 1995 represents the final breakdown of the simplistic state/people dichotomy spawned in the pre-1990s period. By 1994 educational civil society had become the battleground of competing interests groups who attempted to secure leverage to influence state policy. The new democratic state thus had to mediate among widely divergent educational demands as it attempted to express its favoured education policy vision.

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[80]. Chisholm and Kgobe describe a number of conflicts in education during 1993 (Chisholm and Kgobe 1993: 7-12). The deepening education crisis compelled the ANC, who was engaged in multiparty political negotiation at that time, to appeal for calm and the restoration of normality in education.

In the meantime the notion of stakeholder participation began to take root in policy formulation. The NTB became an important forum for the generation of policy with regard to the integration of education and training. The views of business and labour predominated in the NTB. As I explained earlier in the chapter, the integration debate was propelled by the need identified by these two sectors to develop a skilled workforce which would be a central feature of a growing and changing economy. Many other less visible and organised sectors in education became marginalised. For example, Kruss (1998: 3-9) shows how teachers have been ignored in policy development in the area of curriculum and how this has led to most of them feeling a sense of alienation from the newly ordained 'Curriculum 2005'.

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[81]. The aims of the NETF were: 1) the resolution of immediate crisis issues through pro-active interventions, 2) the restructuring of the education system to create an acceptable national system, and 3) the development of a policy framework for an integrated national education and training system (Motala and Tikly, 1993). The NETF had two working groups namely the Short Term Issues Working Group and the Restructuring Working Group.

The new civil society terrain is also characterised by the co-option of many of the erstwhile radical education organisations into supporting the new education ministry in its arduous task of overturning a deep-rooted unequal educational legacy. The teachers organisation, SADTU, for example, was accused of having become a sweetheart union because of its uncritical stance and even active lobbying in support of the government's policy on teacher rationalisation (Kallaway 1997: 45). SADTU began to focus more on improving work conditions and salaries for its members than broader policy issues. The Congress of South African Students (COSAS) embarked on a campaign in high schools in support of restoring a culture of learning in township schools (Makwanazi-Twala et al.1995: 10). COSAS developed a code of conduct that was aimed at teachers and students to adopt behavioural patterns conducive to learning (Makwanazi-Twala et al. 1995: 10-11). While there is little to gainsay the incorporation of organisations onto the redistribution agenda of the government, the effect of this had been to constrain criticism from the left of the political spectrum. The main detractors of the apartheid state's education policy had now become the main defenders of new policy.

The impact of a changed political and policy context on progressive organisations is best illustrated by the decision to close the NECC in 1995 (Chisholm 1995: 7). This organisation was closed because it was argued that the NECC had outlived its purpose which was to campaign and pressurise the apartheid state to be responsive to black education. As this would now be achieved through the new government's commitment to redress and equity in education it was unnecessary for the NECC to exist (interview, Gallie 27/6/1998). However, the NECC was by the time of its closure organisationally very weak. Most of the critical mass of activists which steered the organisation had been taken up into the new national and provincial education ministries and bureaucracies. The NECC became ineffectual due to a lack of resources and organisational capacity and an inability to relate to the new political environment. Moreover, the danger that the NECC could become a forum for 'maverick' anti-government rhetoric could not be discounted. For example, at the start of the 1995, the Western Cape branch of the NECC adopted a programme of illegally occupying empty schools in former white areas in order to secure school places for black children who could not be accommodated in overflowing black schools (Cape Argus 27/1/1995). This was widely condemned by the media as irresponsible (see Makwanazi-Twala et al. 1995). The strong Africanist (anti-white) rhetoric employed by the NECC branch was embarrassing for the ANC and the new government who were intent on following reconciliation politics (see Cape Times 17 /2/1995). The NECC was thus closed as a result of a combination of weak leadership, poor organisation, lack of resources and the disorganising impact of the new political context. But, the need by the government and the ANC to try and avoid uncomfortable confrontational politics cannot be discounted in explaining the closure. Another factor that contributed to the blunting of the critical edge of progressive educational politics was the sidelining of left academics. Contrary to their active participation in policy development in the NEPI process, educational academics fell silent in the first few years after 1994[82].

Civil society was altered radically during the 1990s. In the absence of a progressive civic culture, right-wing interest groups have grabbed a stranglehold over the educational terrain. Education policy's 'context of influence' (Bowe and Ball 1992:19) has thus become dominated by a narrow agenda. I will now focus on the manner in which conservative interests within education have become dominant in influencing education policy making.

4.6.2.2 The Constitution, education policy and the conservative challenge

Right-wing groups intent on preserving their privileges attained a powerful influence in education policy development on the basis of a favourable constitutional framework. As a document constructed in a negotiated context, the Interim Constitution (1993) embraced a moderate stance which was endorsed with minor modifications in the Final Constitution (1996). Hailed as one of the most liberal constitutions in the world, the Interim Constitution fortified 'first generation' rights such as: freedom of association, expression, and choice; the right to life and gender equity. The abolition of the death penalty was upheld by the newly established Constitutional Court in 1995 and legislation in support of legalising abortion was passed by parliament. These and other legislation of similar orientation signal attempts by the state to develop an open and democratic society free from repression and recrimination.

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[82]. See Kallaway, Kruss, Fataar and Donn (1997: 3-5) for comments on the position of academics in education policy making. Academics have since mid-1997 become more vociferous in their critiques. They have been advancing indicting views about the various aspects of education policy in scholarly journals, in lobbying forums, at conferences, and workshops.

However, the Constitution's lack of commitment to'second generation' rights would make the exercise of liberal rights the preserve of a small section of society. The Constitution's approach with regard to the provision of housing, sanitation, health, education and water is that these can only be provided relative to the state's capacity to provide these within the context of affordability. Thus, citizens are unable to lay immediate claim to housing or health care as a fundamental human right. The Constitutional Court would also not uphold demands that the state ought to provide these second generation rights. The constitutional dispensation thus embodies a disjuncture between an entrenched set of liberal rights and a lack of immediate commitment to social rights. This disjuncture is the outcome of a negotiated political settlement shaped in a global capitalist context where a commitment to socialism and social rights have become 'outmoded'.

South Africa's moderate constitutional dispensation has impacted on the nature and pace of transformation in every sphere of social organisation (see Chisholm 1994: 6-7 and Mkwanazi-Twala et al. 1995: 2-3). The constitutional provision for the allocation of powers in education policy making has had a severe impact on the outcome of education policy. It has compromised attempts at establishing a redistributive thrust in educational reforms. It was expected that a redistributive thrust in public and education policy would be attained on the basis of a strong central constitutional framework. Centralism would provide a set of core principles and a strong central government around which the country's transformation and nation-building would revolve. However, given the moderate negotiation context, thirty three binding constitutional principles were entrenched in the Interim Constitution (1993) and which had been incorporated in the Final Constitution accepted by the Constitutional Assembly in 1996. The thirty-three principles crystallized important compromises made in the final stages of political negotiation. With regard to provincial and national powers, the Constitution supports a semi-federal dispensation by incorporating inter alia: that exclusive and concurrent powers be delegated to the provinces and that national government be prevented from exercising its powers in ways that encroach on the geographic, functional and institutional integrity of provinces[83].

The Constitution lists education as a 'Schedule 6' function[84], which means that provinces have power over all aspects of education excluding higher education. The approach to addressing cases where there is inconsistency between national and provincial legislation is that provincial law will prevail. National law will prevail only in cases where national uniformity is threatened. Provinces would exercise these semi-federal powers to adopt legislation that addresses the implementational dimensions of policy specifically with regard to reorganising the bureaucracy and amalgamating the different administrative fragments into unified non racial provincial departments. A degree of provincial autonomy is regarded as necessary in order to ensure that the specificity of regional contexts are taken into account when policies and implementation plans are shaped (see Carrim 1998).

However, two consequences of the semi-federal framework were a struggle over resources between provinces and inadequate redistributive mechanisms from the centre. This especially manifested in the ill-fated teacher rationalisation and redeployment plan (see para 6.4.3). The government attempted to achieve equity between richer and poorer provinces by advancing policy that would see richer provinces decrease the number of teachers employed and move surplus teachers to poorer provinces. Political conflict in the provinces prevented this policy from being implemented fully (see Fataar 1996). While many of the country's most skilled teachers have opted for lucrative voluntary severance packages, redeployment has not occurred at all. The failure of the teacher rationalisation plan could among other factors be attributed to a lack of shared understanding between the national ministry and provincial ministries in the richer provinces.

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[83]. See 'Schedule 4: Constitutional Principles' of the 1993 Interim Constitution (244-9).

[84]. See 'Schedule 6: Legislative Competences of Provinces' of the 1993 Interim Constitution (282-91).

Conflict over education policy occurred in the two non-ANC controlled provinces namely Kwazulu-Natal and the Western Cape, the former controlled by the Inkatha Freedom Party and the latter by the National Party. Specifically in the Western Cape, the numerous conflicts that have occurred over the past few years suggest that semi-federalism was used to retain a conservative thrust in education which aimed to protect the province's relatively privileged status acquired during the apartheid years. Kruss suggests that educational restructuring in the Western Cape is "at variance with developments in the rest of the country" (Kruss 1997:104).

An apt example to illustrate the lack of congruence between national and provincial policy is the Western Cape's interpretation and development of school governance policy. It was the only province that developed legislation that deviated from the spirit, if not the letter, of the national South African Schools Act (DoE, 1996). All the other provinces complied with the stipulations of the Act. The Western Cape Schools Bill (Provincial Gazette Extraordinary (PGE) 1997) embodies a strategy of 'creatively' filling in the gaps and silences that appear in the national legislation. This is akin to Bowe and Ball's view that in the context of practice policy is subjected to "recreation and recontextualisation" (1992: 21). National policy stipulates that an election has to be held to constitute the new school governance structures (DoE 1996: 12). The Western Cape PGE, however, favours the view that where governing bodies have been elected prior to the new legislation they be allowed to continue to function (PGE 1996: 26). The old school committee structures were widely regarded as representative of conservative interests in former white schools. This is an example of a province waiving aside national policy in order to have the control of schools retained in conservative hands (see Maharaj and Sayed 1998).

Another instance of creative interpretation or recontextaulisation went around the balance of power in school governing bodies[85]. National policy suggests that the chairperson of the governing body shall be elected from the parent constituency while the Western Cape's PGE indicates that the chairperson could be elected from any sector. It, however, allocates a casting vote to the chairperson (PGE 1996: 22) who, depending on which constituency the chairperson represents, can have an inordinate impact on the balance of power in school governing bodies. Unlike in national policy where the parents have the balance of power[86], in the Western Cape the power could shift away from parents depending on which constituency the chairperson represents.

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[85]. See Maharaj and Sayed (1998) for an extensive discussion of the differences and conflict between national policy on school governance and the Western Cape's position.

On the question of language policy and religious observance, the national Schools Act, while making allowances for both, provides limiting clauses which prevent any child from being forced to be taught in a language she does not understand or to observe religious practices against her will. In the Western Cape PGE mother tongue education is affirmed without any mention of nondiscrimination. Religious observance is upheld without any reference to freedom of conscience which would protect a child who does not want to conform to the school's religious practices. This was done to allay the fears of culturally conservative groups who felt threatened by the new Constitution's apparent erosion of cultural and religious values (Maharaj and Sayed 1998).

The few examples of 'creative interpretation' of national policy by the Western Cape I raised above suggest that the semi-federal constitutional dispensation enabled deviations from national policy. These deviations often serve as a bulwark in protecting the privileged status of communities in a sea of poverty and inequality. Maharaj and Sayed comments that "the 'gaps and silences' allowed by national policy for provincial authorities to manoeuvre in, can lead to a situation in which hidden agendas are allowed to become operational" (1998: 7). The constitutional dispensation gave rise to a complex policy making framework in terms of which a number of interests within state structures compete over policy meanings. The national - provincial policy disjuncture compromised a redistribution education policy orientation (Kruss 1997). Conservative interests were advanced within the constitutional spaces presented by a semi-federal education policy framework.

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[86]. Parental control of governing bodies has caused consternation among teachers and teacher unions who feel threatened by being controlled by parents whom they fear might not understand the dynamics of school institutional processes.

The Constitution also bequeathed another important constraining factor that inhibited change in education. That is, the guaranteeing of the jobs of senior apartheid-era civil servants. As part of the outcome of the negotiated settlement the Constitution made provision for the protection of jobs of civil servants in order to persuade them to comply with the settlement. This, however, caused endless difficulty in gearing the bureaucracy for a new transformative orientation under the new government. In education the national Education Ministry experienced frustration with old bureaucratic traditions, convoluted line-functions and uncommitted senior civil servants (Chisholm 1994: 8-11). The Gauteng Education Ministry's response to difficulties experienced in bringing together widely divergent bureaucratic cultures from the old departments, was to devised a number of strategies to overcome their problems. These included: cooperation with other parties, an audit of civil servants to ensure compliance with the new policies, the recruitment and training of new personnel for the civil service and a programme of training for civil servants (Chisholm 1994: 8-11). A bureaucratic culture thus had to be developed which could support the implementation of the new policy orientation. The presence of senior old-style civil servants was a constraining factor in the development of a new bureaucratic culture. The national and provincial education ministries were thus faced with the formidable task of developing bureaucratic and administrative structures that would be able to facilitate the implementation of education policy.

4.6.2.3 Instances of conservative challenges to education policy

A number of developments have occurred over the last few years that illustrate the rising prominence of conservative civic forces in contesting and shaping education policy. The role of the mainstream media in determining the education policy centre by focusing attention more on protecting educational privilege rather than equality-based policy, ought not to be underestimated[87]. The media assisted in establishing conservative education interests in a prominent position in the public domain. Judging from the hundreds of representations made in response to the White Papers on school governance and funding[88] a wide-ranging conservative lobby became very active in engaging education policy. This reflects better organisation on the part of conservative constituencies whose vigorous responses are driven by fear of losing their privileged status (see Govender et al. 1995: 5).

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[87]. A gap in education policy research that needs filling is an academic analysis of the role of the media in 'constructing' a conservative education policy agenda.

Two prominent challenges to national policy show the efficacy of conservative groups in lobbying against national education policy. Firstly, a successful challenge against teacher policy was made by an alliance of eighty former Model C (white) schools under the leadership of Grove Primary School in the upmarket area of Claremont in Cape Town. The Grove lobby opposed the teacher redeployment plan on the basis that it infringed on the 'constitutional right' of schools to appoint its own teachers[89]. The plan suggested that teachers who are declared as 'supernumery' at schools, i.e. teachers who are in excess, be redeployed to schools with a shortage of teachers. These teachers had to be selected by the schools from a redeployment list supplied by the Western Cape Education Department (WCED). This would enable the WCED to provide supernumery teachers with alternative teaching jobs in the province and thus prevent large scale retrenchments. The Grove lobby successfully challenged the stipulation that teacher selection be done from the list. The Cape Supreme court ruled this stipulation as unconstitutional and thus supported the position that schools have the right to employ any teacher. Grove's argument was based on what their governing body chairperson, Helen Zille, termed as the 'defence of quality education' (Cape Argus, 12 March 1998). SADTU and the Cape Professional Teachers Association, however, interpreted the Grove challenge as a veiled attempt to retain its privileged position (Chalkline, May 1997).

The second challenge brought by an amalgam of conservative interests revolved around the integration of schools. The National Party, Democratic Party and Freedom Front challenged the Gauteng Schools Education Bill in the Constitutional Court. The Gauteng

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[88]. Govender, Greenstein and Kgobe (1995) comment that the vast majority of respondents to the school governance and funding proposals were white and conservative.

[89]. The eighty schools contributed from school funds to the cost of the case. Ironically, even if poor schools wanted to challenge policy in court, they will not have the financial basis to do so. Thus, the view that the Constitution and the judicial system hold advantage for those who can afford to pay for access to the system has been given credence by the Grove challenge.

Bill sought to prevent former white schools from excluding black children on the basis of language[90] and religion. The Bill outlaws discrimination in determining access to schools. The three parties argued against the Bill's prohibition of language proficiency testing as a means of determining admission to schools and the formulation of religious policy which makes attendance of religious classes and practices voluntary. They based their challenge on point 29 (3) of the Final Constitution which provides that everyone has "the right to establish, where practicable, educational institutions based on common culture, language, or religion, provided there shall be no discrimination on the grounds of race" (Final Constitution 1996: 14). They argued that this constitutional provision creates an obligation on the state to establish and fund schools that are based on a common language and/or religion. The Gauteng government opposed the application by arguing that language proficiency testing would effectively prevent black students from gaining access to Afrikaans-language schools which would be unconstitutional. Voluntary religious participation, the Gauteng government argued, was necessary to develop a democratic culture of respect for the country's cultural and religious diversity (see Chisholm 1995: 6-7 and Chisholm and Vally 1996: 9-10). The Constitutional Court pronounced that the Constitution does not compel the state to establish language or religious schools. The Court found that the disputed clauses in the Gauteng Schools Education Bill did not conflict with the Constitution[91].

This ruling was especially important and timely in the light of conflict that erupted in small rural towns where black children started to attend former whites-only schools. In a situation where the white section of the school population has been decreasing in these towns the many empty seats in schools would logically be made available to black children from the towns. However, many instances of racism were reported around racial integration in rural schools[92]. In many cases the Afrikaans language was used to prevent black children from gaining access to the schools. Some rural schools introduced English medium of instruction classes to accommodate black children. In the highly publicised cases of Potgietersrus, Groblersdal and Vryburg violent clashes occurred between white parents and black students over school access. At these schools conservative parents attempted to bar blacks from the schools on grounds of cultural incompatibility and the use of Afrikaans as a mechanism of exclusion (Chisholm and Vally 1996: 10). The vigorous, but unsuccessful, effort by the National Party to entrench single medium schools in the Final Constitution can be seen as a last ditch attempt to protect racially exclusive schools. What the conflict over the integration of schools highlights is that historically privileged groups were mobilising actively to protect their positions. Constitutional Court challenges, language streaming of classes, establishing cultural-specific private schools (the Constitution makes provision for this), and violence were employed to prevent racial integration in the new context. Racial integration in schools, even where it will be relatively conflict-free, will experience many difficulties and problems in the years ahead.

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[90]. The development of national policy on norms and standards for language in education has been ongoing under the coordination of the state-appointed Pan South African Language Board.

[91]. See Chisholm and Vally (1996) and Mabasa (1996) for a discussion of the ruling by the Constitutional Court with regard to the challenge brought against the Gauteng Education Schools Bill.

What the above two examples of conservative challenges show is that national policy does not enjoy support across the system. Groups who have most to lose by the changes found ways to challenge policy which they perceived to be against their interest. They have the organisational wherewithal and financial resources to challenge changes with persistence and political fervour. Linkages with the mainstream media elevated their opposition to prominence which the government found hard to ignore. The rise of conservative interest groups impacting on education policy is an abiding feature of the post apartheid period. Its impact on education policy meanings and outcomes was severe in limiting the extent to which policy is able to address demands for transformation in education. The process of education policy narrowing over the last few years was achieved in the context of a constellation of conservative education forces that gained prominence in civil society.

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[92]. See Mabasa (1996) for a list of incidents of racial conflict in schools during 1995-1996.

4.6.2.4 Instances of global influence on education policy

It is not easy to analyse the impact of global influences on public policy[93]. The international literature emphasises two theoretical nodal points around which analyses of global influence are made namely, 1) policy borrowing and 2) knowledge transfer. The South African literature on education policy shows a paucity of research on the link between globalisation and education policy. This is an area that deserves to be given greater attention. While I will not provide a systematic analysis of this link, I proffer the following remarks as a potential starting point for debate. As I argued in Chapter Two, I believe globalisation acts as a 'diffuse social movement' in that its influence extends pervasively across the public and education policy environment. The overall impact of globalisation on public and education policy is to actively promote the reconstitution of social relations to service capital accumulation in the global economy (see para 2.5). Its impact is diffuse because while its influence is omniscient it is difficult to ascertain its precise impact on policy. Global influences can only be understood in terms of the interaction between it (globalisation) and national and local policy dynamics. That globalisation plays a big part in shaping education policy is not doubted, but its specific impact depends on the nature and policy dynamics inherent in specific education policy subsections such as curriculum, higher education and school access. In Chapters Five and Six my analysis of school curriculum and school access policy respectively takes the impact of globalisation into account.

Education policy made in South Africa in the 1994 to 1997 period is replete with indications of global influences and trends. The choice of a growth-led conception of education policy is consonant with similar trends in other parts of the world. Education for growth is propagated as the panacea for countries' economic and educational ills. The growth-led path gained international credence on the back of monetary agencies such as the World Bank and the International Monetary Fund's insistence that countries restructure their economies along prescribed lines (see para 2.5). South Africa was said to have chosen a voluntary structural adjustment path in order to gain competitive advantage as an emerging player on the global stage (Kallaway et al. 1997 and Chisholm 1997). South Africa was not coerced, as many countries of the south had been, into following a growth-led path.

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[93]. This section is based on the conceptual elaboration of the link between globalisation and education that I have developed in Chapter Two.

Much of the terminology and conceptual language used in education policy are similar to that in many other countries. Some examples are: user fees, decentralisation of school governance, equity, efficiency, performativity, quality assurance, Outcomes-based education, and universal primary education[94]. Another global influence is revealed in the policy borrowing on which the NQF was based. The qualifications frameworks of countries such as Canada, Scotland and New Zealand were extensively consulted to inform the NQF. Labour consultants from Australia played a leading role in influencing COSATU's HRD policy position.

More evidence of global influence has been the 'lobbying through research' done by the World Bank on South African education. Many prominent leftist education academics including Jonathan Jansen, Mary Metcalfe, Peter Buckland, Punday Pillay, and Ahmed Essop[95] participated in the commissioned research. The World Bank published and disseminated the following three reports with the aim of influencing post apartheid education policy:

1) Approaches to the Construction of School Infrastructure in South Africa (1992)
2) Public Expenditure on Education in South Africa, 1987/8 to 1991/2 (1994)
3) Education Planning and Systems Management: An Appraisal of Needs in South Africa (1993)

The second report was produced collaboratively by the ANC's Centre for Education Policy Development and the World Bank. A final summative report on South Africa was produced in 1995 by the Bank entitled 'South Africa; Education Sector - Strategic Issues and Policy Options'. It states that

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[94]. See World Bank Education Report (1995) for similar terminology.

[95]. Metcalfe became the first Minister of Education in the Gauteng province, Pillay and Essop are senior civil servants and Buckland works for UNESCO. Jansen stayed in academia.

> The report has been written for two reasons. First, it is a means to share with colleagues and management within the World Bank our current thinking regarding education in South Africa. Secondly, we hope that the report will contribute to the rich policy discussion ongoing within the country, and thus will be useful to the Government of National Unity as it addresses a wide range of challenges in the education and training sector (World Bank 1995: 1).

According to Janet Leno, World Bank specialist on education in Southern Africa, the Bank chose to use local research capacity to prepare the reports. She indicated that this was a political strategy on the part of the Bank to establish its legitimacy in South Africa. In countries where little research capacity exists and when governments express a dire need for loans, the Bank appoints its own consultants. These countries have no choice but to comply with the Bank's adjustment stipulations. Leno argued that in a highly politicised country like South Africa the extension of the Bank's influence has to be subtle. Becoming part of the South African academic and policy debating environment has been chosen by the Bank as a more appropriate way of influencing policy[96].

South African education policy was influenced in very direct ways by external forces. One particularly visible example of this was in the area of school funding policy. Funding policy is contained in the South African Schools Act (DoE, 1996) which was the outcome of a long and complicated policy process. A number of recommendations were suggested as potential ways to develop an equitable funding formula which would unify South Africa's widely divergent schooling system[97]. The South African Schools Bill opted for what was termed the 'Middle Class Mandatory Fee Clustering' option (DoE 1996: 57) on the assumption that middle class children should be encouraged to stay within the public system as their parents are most likely to lead advocacy for change and reform. The option establishes the principle that parents who can afford to should pay user fees if they want to have their children attend quality schools. Arguably, this policy position would give rise to widening inequality between former white and black schools instead of a more unified and equitable system. Two points are worth noting with regard to the role globalisational influences played in determining school funding policy. Firstly, the adoption of the middle class option was done at the behest of international consultants to the Department of Education. The influence of Professor Christopher Colclough and Dr Lois Crouch represent a case of knowledge or information transfer within a globalisational context. These consultants developed their proposal against the backdrop of the "GNU's commitment to strong fiscal discipline leaving little room for continuing real increases on spending on education" (DoE:1996: 58). Crouch continues to play an influential role in determining education budgetary policy (Vally and Spreen: 1998). Knowledge transfer or what is also called 'policy borrowing' played a role in shaping school curriculum policy. Secondly, a consequence of the funding proposals has been to deepen divisions in schooling patterns in South Africa which are akin to the stratification of schooling patterns on a global level. Illon (1994: 95-103) suggests that these patterns are no longer constituted within national boundaries but that they are the outcome of global economic processes engulfing the world at the end of the twentieth century.

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[96]. I obtained these views in a personal interview I had with Ms. Leno at the World Bank, Washington DC in October 1996.

[97]. I discuss in greater detail the various school funding proposals in Chapter Six.

From the foregoing description of the influence of globalisation on South African education policy one can conclude that there was active interaction between national policy formulation and global forces. The specificity of this interaction is in need of careful analysis. I would suggest that the accumulation - reproduction contradiction that any state has to mediate (Dale, 1982) is accentuated by the impact of globalisation on public policy. Globalisation forces the state to give more credence to accumulation while it simultaneously has to develop public and social policy in a constrained financial environment. The result is that the state's financial commitment in areas such as education and social welfare is significantly down scaled. Public policy based on a growth-led framework is foregrounded while an equality position becomes sidelined. I thus want to suggest that globalisation played a fundamentally negative role in constructing education policy and ought thus not to be discounted in explaining how the narrowing of the educational agenda has been achieved.

4.7 Conclusion

I have attempted in this chapter to develop an explanatory framework in terms of which I would be able to do further analytical work on education policy made in South Africa between 1994 and 1997. While this chapter has provided a macro-level analysis of broad policy patterns, the next two chapters will focus on two specific policy instances namely school curriculum and school access policy. Analyses of these instances will be made against the analytical backdrop advanced in this chapter.

I have argued that education policy should be evaluated in the context of a moderate political transition that was the outcome of a negotiated settlement. While the transition enabled South Africa to move toward a political democracy it also entrenched a constricting political and ideological framework which limited the extent to which educational transformation could be achieved. Policy making has also been affected by the constricting parameters of the global economic environment which South Africa, like all other LDCs seeking to enter it, has had to face. This has left the government little room for manoeuvre in its attempt to give effect to its vision of reform. Policy, too, has to be understood in the light of having to address the complex apartheid legacy, as well as the moderating effect of governance as opposed to protest politics. The conservative education policy made after 1994 ought thus to be understood as the outcome of a limiting national and international conjunctural context.

Moreover, I have contended that education policy must be understood in the light of a considerable narrowing of the socioeconomic agenda that has emerged in the period. The adoption of GEAR represents a victory for a growth-led macroeconomic framework and the sidelining of equality as a conceptual pivot of reconstruction. Equity would be contingent on economic growth. GEAR also represents the government's preference for supporting capital accumulation while simultaneously downscaling its (the government) commitment to the provision of social and public services. I have argued that GEAR is fundamentally flawed and will not be able to lead to the development of a strong and competitive economy.

Education policy narrowing occurred in a growth-led context. The adoption of the NQF, while constitutive of equality dimensions such as providing access for adult learners and workers, is dominated by the need to develop an appropriate HRD system which would be expected to assist in establishing South Africa as a competitive export-oriented economy. This concern led to the dominance of a human capital theory perspective in education. Education is supposed to provide workers with the requisite skills to rebuild the economy. Because of the failure of GEAR to stimulate economic growth, the untenable situation is created in which education is expected to develop human resource capacity outside of a supportive economic environment. The final straw in the narrowing of the educational agenda was the adoption of an Outcomes-based pedagogical approach which concentrates on measuring performance than on generating a democratic pedagogy.

In turning to the process of policy making, I have concentrated on the manner in which education policy conservatism has been achieved. I have argued that the reconstitution of civil society, which saw the demise of progressive educational forces and the mobilisation of a constellation of right-wing groups, has played a major role in shaping education policy outcomes. The constitutional dispensation gave these groups considerable space to protect their historically acquired privileges. I have also advanced an argument and supportive evidence around the impact of globalisation on education policy.

Education policy in South Africa made during 1994 and 1997 has manifested a very definite vision of educational and social reform. Instead of an emphasis on redistribution and equality, the government has chosen to vigorously target an economic growth first approach. Social amelioration is expected to follow later. Both the government's socioeconomic and education policies target the development of a strong economic framework. I have argued that this vision is fundamentally flawed and thus untenable. It stands very little chance of achieving the self-defined aim of a globally competitive economy.

Chapter 5: School curriculum policy as an aspect of education policy development

5.1 Introduction

> If there is one proposition about curriculum policy that is clear, it is this: that the school curriculum becomes an issue in communities and societies that are undergoing significant change (Boyd 1979: 245).

On 24 March 1997, Prof Bengu, South Africa's Minister of Education and Training, announced the government's intention to adopt policy in the area of school curriculum based on the notion of Outcomes-based education (OBE) and entitled 'Curriculum 2005'. The announcement was made outside the parliament buildings amid great fanfare with the release of 2005 multicoloured balloons (Cape Times 25/3/1997). This signalled the government's attempt to imbue the new curriculum policy with symbolic importance as a sign of the government's willingness to legislate for radical change in education. Until then, policy developments related to schooling were limited to: the rationalisation of teachers and the negative politics in reaction to it (see Fataar 1996: 37-39); inchoate policy in areas such as continuous assessment, abolition of corporal punishment and the purging of racist and sexist elements in school syllabi (Tikly and Motala 1994: 6); and conflict around school governance and funding policy (see para 4.5).

There were two curriculum processes during June 1994 and July 1997, one producing what was termed 'essential alterations' (Jansen 1995a: 1-13) to 'cleanse' the apartheid curriculum, and the other producing Curriculum 2005. The government adopted a strategy of short-term curriculum change which focused on removing offensive content from the then existing apartheid curriculum which violated the letter and spirit of the post apartheid order. A longer term curriculum policy process followed which aimed at producing a completely overhauled curriculum. I discuss both these processes below.

Curriculum 2005 was intended by the Ministry to be a coherent policy initiative that would change the nature of schooling in line with the aim of embarking on the "transformation of learning and teaching in South Africa" (Greenstein 1997: 6). The Director-General of Education, Dr Chabani Manganyi elaborates thus:

> The curriculum is at the heart of the education process. In the past it has perpetuated race, class, gender and ethnic divisions and has emphasised separateness, rather than common citizenship and nationhood. It was therefore imperative that the curriculum be restructured to reflect the values and principles of our new society (DoE 1997b: 2).

Curriculum 2005 makes provision for an outcomes-based learning and assessment method which would replace the extant content-based curriculum (DoE 1997b: 31-37). The changes envisaged by the new curriculum were touted by the DoE as a radical departure from the apartheid school curriculum. OBE focuses learning on the achievement of defined outcomes rather than teacher input based on syllabus content (DoE 1997b:32). Eight new learning areas are to replace the traditional subjects (DoE 1997b: 24-31). Curriculum 2005 gives expression to and is built on the integration of education and training agenda that the Education Ministry has embarked upon after 1994.

Subsequent to the announcement of the new curriculum, a highly charged debate took place in the mainstream media. The most telling criticism was that the radical changes implied by the new curriculum are unrealisable in impoverished school contexts where the majority of teachers are ill-prepared and underqualified[98]. These responses were devoid of serious and substantive analysis. It did succeed in elevating curriculum change to the centre stage of public policy discourse. The acrimony generated by the policy announcement gives credence to Weiler's position, based on his analysis of curriculum change in Germany (1990: 15-28) and France (1988:257-265), that curriculum policy is always highly contested by a diverse range of interests across the societal spectrum. This is because curriculum makes a statement about the nature and type of society the state, through public policy, chooses to imbue with authoritative status. What critical policy sociologists refer to as the authoritative allocation of values finds its most eloquent and focused expression in curriculum policy (see para 2.6). Conflict over curriculum is representative of wider difference of opinion regarding the nature of citizenship within any society (Muller 1997b:181).

Notwithstanding the rhetorical flourish in the media, I attempt in this chapter to provide an analysis of Curriculum 2005 that can be said to employ a 'politics of curriculum' analytical approach. This approach foregrounds an understanding of the vision of social and educational reform embodied in the curriculum and the link between the curriculum policy process and substantive policy meanings. Although no less important in any analysis of curriculum, but backgrounded in this chapter, are those issues that can be said to be internal to curriculum. I refer here to the substance of curriculum which includes analysis of pedagogical modes, approaches to evaluation and testing and academic development. I do not ignore this dimension but will discuss it in relation to my primary concern of uncovering the socio-political and policy dimensions embedded in Curriculum 2005. In pursuing this approach I follow Weiler (1990: 17) who comments that a 'politics of curriculum' approach "should lead the analysis of curriculum policy to pay greater attention to the modalities (as distinct from the substance) of policies and to the nature of the policy process"[99] (Weiler 1990: 17).

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[98]. See Johnson, Benjamin and Cottle ('Curriculum 2005 is regressive', Cape Times 2/6/1997) and Ellis ('School plan is ambitious, but naive', Cape Times 14/4/1997) for examples of strident criticism against Curriculum 2005.

The macro analysis of education policy I provided in Chapter Four forms the generic backdrop for an analysis of curriculum policy in this chapter. Curriculum policy presents a specific instance of education policy development in South Africa. I support an analytical position which considers the particularity of education policy making within macro global context. The specific interplay between global and national dynamics determines policy outcomes. I discuss this interplay as it manifested in the curriculum policy process and which led to the specific nature of policy meanings contained in Curriculum 2005. I thus attempt to demonstrate the relationship between the policy process and policy meanings. I proceed from the view that policy meanings are contingent upon the nature of the policy process within the structural and political environment that obtains in any given political conjuncture. I provided an elaborate argument in Chapter Four around the relationship between education policy narrowing and the narrowing of socioeconomic policy that manifested during the South African transition from 1994 to mid 1997 (see para 4.4.). While the structural level remains influential in delimiting the policy context, the relative autonomy attributed to agency in the policy process plays a decisive role in shaping specific policy.

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[99]. See Jansen (1990a: 29-38; 1993: 58-68; 1995a: 245-261; 1995b) and Weiler (1990:15-28) for apt examples of a 'politics of curriculum' approach.

Methodologically, my analysis is based on a number of extensive interviews I had with curriculum bureaucrats who were at the head of the process, teacher union officials who participated in the process and representatives from interest groups such as publishers and subject associations. My choice of interviewees was based on their proximity to and active participation in the curriculum policy process.

This chapter revolves around five dimensions, to which I devote a section each. Firstly, I advance an analytical framework based on a 'politics of curriculum' approach. 'Compensatory legitimation' is the primary analytical concept in terms of which curriculum policy is understood as a mechanism used by the modern state to retain its legitimacy (Weiler 1990: 5-18).

Secondly, I locate current curriculum policy within its historical context. I discuss the genesis of the curriculum favoured under apartheid and consider the curriculum practices that the apartheid curriculum spawned. This historical dimension establishes the pervasive role the apartheid curriculum philosophy played in constructing the identity of teachers in South Africa. I pursue the view that the efficacy of the new curriculum is influenced by the extent to which the atrophy of the apartheid curriculum is factored into curriculum policy.

Thirdly, I concentrate on the curriculum policy processes. I discuss the short-term curriculum process which took place in the latter half of 1994 and which provided for the 'cleansing' of offensive content from syllabi and textbooks. This is followed by an analysis of the longer term policy process which produced Curriculum 2005. My analysis will suggest that the policy process was subjected to what I term 'managed participation'. This refers to the tension brought about by the state having to demonstrate, for purposes of legitimation, popular participation in the process by legitimate groups in civil society on the one hand, and on the other hand having to have curriculum policy conform to socioeconomic and political parameters determined outside of the curriculum process.

The fourth aspect of this chapter focuses on 'outcomes' as the epistemological foundation of Curriculum 2005. I consider the viability of having the school curriculum based on 'outcomes'. Importantly, this section focuses on the self-defined need of OBE to achieve much closer linkages with the economy and the world of work (see DoE 1997b: 8-11).

The fifth section provides an argument based on the efficacy of Curriculum 2005 in relation to the supportability or otherwise of the level of practice, i.e. the school, teachers and classroom. Drawing on the historical analysis I provide earlier in the chapter and a description of contemporary schooling, I favour the view that Curriculum 2005 will stand little chance of succeeding in giving rise to a "transformed education and training system in a practicable and sustainable way" (DoE 1997b: 5). I then pursue the view that Curriculum 2005 represents an attempt by the government and Education Ministry to seek through curriculum policy to address a 'deficit in legitimacy' brought on by the government's inability to address in any fundamental way the equity-based demands of the majority of its citizens. What legitimacy the government lost in its choice of a narrow public and education policy orientation, it attempted to use the symbolic value inherent in curriculum to regain legitimacy through 'signalling' a willingness to embark on radical change. However, instead of generating legitimacy, curriculum policy has increased the government's deficit in education

5.2 Analytical framework

Before elucidating 'compensatory legitimation' as the central analytical category around which I build a 'politics of curriculum' framework, I will focus in brief on an array of articles that have appeared in reaction to the declaration of Curriculum 2005 as official curriculum policy.

Sieborger (1997) gives a personal account of his participation in the learning area committees that were set up in July 1996 by the National Education Department. At that stage the main outlines of the new curriculum, the framework, learning areas and critical outcomes had already been finalised. The learning area committees were tasked to produce learning area outcomes. Sieborger's paper is essentially concerned with explaining how these outcomes were produced. Kruss (1997) focuses on the participation, or lack of it, by teachers in the curriculum policy process. She argues that the technicist nature of the process alienated teachers from the new curriculum (1997: 9-13). Du Toit (1997: 125-131) addresses the challenges and problems that Outcomes-based evaluation presents to those teachers and institutions that specialise in teaching learners with learning problems. Arjun (1998: 20-33) challenges the notion that Curriculum 2005 can be regarded as a paradigm shift. In describing the constituent features of a paradigm he concludes that Curriculum 2005 does not represent the annihilation of the existing scheme of reference. He argues that the new curriculum, despite the claims to the contrary, has great continuity with the old curriculum (Arjun 1998: 24-26).

Papers by Kallaway (1997b) and Jansen (1997a and 1997b) are instructive in highlighting a number of epistemological and procedural problems with the school curriculum model. Four of Kallaway's are worth raising. Firstly, he questions the epistemological foundations of OBE, by inter alia, raising trenchant critique around the efficacy of defining learning in terms of narrow behaviouristic outcomes, the occlusion of content and the collapse of disciplinary boundaries (Kallaway 1997b: 4-8). He posits that Curriculum 2005 and OBE are based on "a positivistic set of assumptions about the nature of learning and a technicist approach to teaching and learning that has been massively discredited in the educational world - outside of the most conservative establishment" (Kallaway 1997b: 8).

Secondly, Kallaway, in concurrence with criticism raised in the media, points to the level of practices' (i.e. schools and teachers) inability to provide a supporting context to make the implied radical curriculum change succeed (1997b: 10-11). Thirdly, he attributes the genealogy of Curriculum 2005 to global forces who through institutions such as the World Bank prescribe a rigid curriculum pattern for the developing world under the pretext of producing globally competitive citizens (1997b: 2-3). This has rendered curriculum policy ahistorical and a betrayal of the People's Education discourse which emphasised a critical and open-ended curriculum approach (1997b: 4).

Fourthly, and related to the third point, Kallaway levels severe criticism against the curriculum policy process which he describes as "taking place behind the closed doors of the Education Department. ... little consultation has taken place with the educational community in South Africa" (1997b: 3). He maintains that greater participation is needed by those such as teachers centrally involved in the implementation of curriculum. He decries the lack of attention paid by policy makers to the views of practitioners in determining curriculum policy (1997b: 3). Despite this comment about the policy process, Kallaway displays ignorance of the actual process in which Curriculum 2005 was produced. Lack of understanding of the dynamics inherent in policy processes is a major theoretical weakness of education policy analysis in South Africa. Many educational analysts[100], in emphasising the impact of globalisation on education policy, fail adequately to analyse the various local and national educational policy processes. The interaction between global influences and local processes is therefore ignored in favour of analyses which read South African policy off against global influences. Contrary to this type of analytical approach, I will analyse Curriculum 2005 in terms of the interaction between global and local dimensions by 'looking inside' the curriculum policy process in order to uncover how certain policy discourses became dominant and how policy meanings were shaped.

A provocatively titled and wide-ranging critique of Curriculum 2005 was provided by Jansen[101] in May 1997. Jansen's 'Why OBE will fail' (1997a) circulated widely in the media, among academics, teachers and teacher organisations and the bureaucrats in the DoE. Jansen commented in a subsequent paper published in July 1997 that he felt disappointed at the reaction his criticism evoked and that instead of generating a much needed discussion around curriculum policy, his views were dismissed as propaganda and that of an academic out of touch with teachers (Jansen 1997b: 2-5). Jansen, I believe, raises very important problems with OBE and Curriculum 2005.

Jansen supplies ten reasons why he thinks OBE will fail. These can be grouped into four core problem areas. Firstly, like Kallaway, he questions the nature of the policy process. He is dismayed by the absence of a democratic process and that the process has largely been led by white experts. He also questions why the government whose main constituencies valued process has come "to organise its policies on the basis of outcomes" (1997a: 6). He asserts that the rush to implement OBE and thereby flout a democratic process was driven by the political pressure felt by the Education Ministry to demonstrate change in order to reclaim political legitimacy for a Ministry that has had little success in transforming education (1997a: 6).

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[100]. See Chisholm (1997), Vally (1997a and 1997b), Vally and Spreen (1998), McGrath (1997) and Donn (1997) for examples of educational analyses which emphasise the global linkages of policy, but give negligible attention to local education policy processes.

[101]. Jansen has published prolifically on curriculum in Southern African countries since the late-1980s. See Jansen 1989, 1990a, 1990b, 1993, 1995a, 1995b and 1995c.

Secondly, he argues that OBE succumbs to an instrumentalist, means - ends approach to knowledge which violates the epistemological structure of certain forms of knowing. While teaching a child to repair a bicycle can be done by following certain demonstrable performance outcomes, teaching for open-ended enquiry cannot be done according to narrow outcomes. He criticises OBE as based on a narrow behaviouristic approach which would stifle creativity and knowledge as an end in itself rather than a means to predetermined ends. Jansen insists that there is a fundamental contradiction in urging "students to use knowledge creatively only to inform them that the desired learning outcomes are already specified" (1997a: 6).

His third area of criticism revolves around his view that OBE sidesteps the contentious issue of values. Jansen asserts that the critical outcomes and learning area outcomes are bland and decontextualised (1997a: 6-7). The absence in the outcomes of a "commitment to combatting racism and sexism in society, or developing the Pan-African citizen" (1997a: 7), or the vague reference to justice and equity will not engender a curriculum ethos which can underwrite the process of establishing a non racial and non-sexist society. He also comments that the failure to produce outcomes without defining content could lead to varying interpretations by teachers which might have the effect of undermining core values. This raises the debate about the relationship between content and outcomes and whether outcomes can be acquired outside a knowledge base[102].

Jansen's fourth criticism is directly related to the main proposition of my thesis, i.e. the link between education and socioeconomic and political change and development. To quote him at length:

> ... OBE as curriculum policy is lodged in problematic claims and assumptions about the relationship between curriculum and society. Among advocates, OBE policy claims in South Africa are either associated with, stated as prerequisites for,

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[102]. See Meerkotter (1984: 1-18) for an illuminating discussion on the relation between content and creative learning.

> or sometimes offered as a solution to economic growth ... There is not a shred of evidence in almost 80 years of curriculum change literature to suggest that altering the curriculum of schools lead to or is associated with changes in national economies ... To make such connections between curriculum and society has understandable political goals; but they have no foundation given accumulated research on curriculum change (1997a: 3-4).

From the above statement it is clear that Jansen criticises Curriculum 2005 for conceptualising curriculum change in terms of playing a leading role in bringing about socioeconomic change. He favours the view that the curriculum cannot be linked so directly to broader change. The latter is to be sought largely in socioeconomic and development policy. Furthermore, he also suggests that the multiple levels of innovations required in areas such as in service training, new learning resources, parental participation and the retraining of school managers suggest a complete re-engineering of the school system. This, he believes, will be difficult to establish as a result of the lack of a political will to make funding available for such a massive project (1997b: 6). Jansen concludes his criticism by stating that Curriculum 2005 does not take into account years of debate about curriculum change and that because of this will tend to undermine the already fragile learning environment existing in schools and classrooms. 'Curriculum abortion', he believes, would be the appropriate policy strategy "if educational planners are serious about restoring the culture of learning in schools" (1997a: 9).

The commentary pieces by Kallaway and more particularly Jansen, while at times employing emotive language and exaggerated claims, focus the curriculum debate in South Africa on important aspects of what is entailed in curriculum change. They suggested a number of ways in which the curriculum policy is flawed. There are two analytical shortcomings in their criticism. They do not provide an analysis of the policy process in terms of which Curriculum 2005 was generated, and they fail to provide a cogent analytical framework in terms of which curriculum policy can be understood as the outcome of the dialectical interaction between a socioeconomic development vision and the nature of education policy in establishing an overall vision of reconstruction and change in South Africa. My approach is based on an attempt to establish the nature of the interaction between these two dimensions through an analysis of curriculum policy. I now move on to an elucidation of a 'politics of curriculum' analytical approach.

At the centre of a 'politics of curriculum' analytical framework is a conceptualisation of curriculum advanced by Weiler which focuses on an understanding of curriculum as a strategy that addresses the loss of legitimacy experienced by the modern state in the era of late capitalism (Weiler 1990: 16). Weiler coined the phrase 'compensatory legitimation' in reference to the state's continual search for strategies to regain lost credibility and legitimacy. Curriculum policy, as I will elaborate below, is a key strategic site used by the state to attempt to establish its legitimacy. As Weiler puts it:

> ... the emphasis of many curriculum reforms on the symbolism of change and innovation ... reflects the concerns of the decision-makers over the legitimacy of the decision making process, and is designed to contribute, in a compensatory fashion, to the restoration of that legitimacy (1990: 16).

The notion of compensatory legitimation was developed in contexts where the normative basis of the state's political authority was eroded. The state's ability to govern through the expanded provision of social services and material benefit receded. Where the state's normative basis is eroded, it loses it legitimacy and it thus has to find alternative ways of addressing this legitimacy deficit. Weiler argues that the capitalist state has lost its ability to govern on normative grounds as a result of the emergence of contradictions between capitalist forms of economic organisation and democratic forms of political organisation (1990: 16). Weiler elaborates that "as the range and scope of the state's activities increase, there is a corresponding or, indeed, disproportionate increase in the need for legitimation" (1990: 16). The state's attempt to deliver on the demands for expanded social welfare provision becomes harder to satisfy as a result of pressure on the state to decrease its social spending. Put differently, the accumulation - reproduction contradiction (see para 2.4 and 2.5) in a context of globalisation is resolved in favour of accumulation as the state is pushed to limit its activity in reproduction. As a result the state suffers a crisis of legitimacy.

In the realm of education policy the same basic contradictions as referred to above exist. Education reform policies with its associated rhetoric tend to "generate expectations, which, given the limited capacity of the capitalist state for accomplishing genuine change, they (education policies) prove unable to meet" (Weiler 1990: 17). Weiler asserts that the usefulness of the concept 'compensatory legitimation' is that it can be used to understand public and education policy in the light of one of the state's responses to its legitimation crisis (1990: 17). Policy, thus, becomes an instrument for compensatory legitimation, i.e. policy ought to be understood in relation to its strategic value in regaining legitimacy for the state. While the rhetoric of policy signals radical change, contradictions are generated by the inability of such change to be sustained as a consequence of the neo-liberal tendency to cut social spending (see para 2.5.5). The primary concern of a 'politics of curriculum' approach is to analyse curriculum policy in relation to concerns for compensatory legitimation. Curriculum reform holds important symbolic value especially in transitional societies where the direction of educational change is still subject to contestation (Carnoy and Samoff in Jansen 1995b:2).

Weiler argues that the curriculum is one of the most important policy areas the state uses to deal with its legitimacy deficit. He contends that this is because

> ... curricula are the most tangible codification of the objectives a society wants to reach through its educational system, and of the skills and values it wishes to instil in future generations through its schools. Values such as patriotism, filial piety, critical thinking, sharing, competition, religious orthodoxy, tolerance, obedience, respect for life or punctuality all loom large in one curricular system or other (1990: 17).

It is therefore no coincidence that the state invests such a lot of symbolic value in its curriculum policy. Of all education policy decisions, curriculum choices tend to be most explicitly normative and are therefore likely to be the subject of conflict and dispute (1990: 18) which centres around the state's chosen vision of the type of society it seeks to establish. Strategies to manipulate curriculum policy for compensatory legitimation do not address the fundamental problems of the state's legitimation problems. To the contrary, it increases the legitimation problems of the state.

Jansen (1990a: 29-38) brings three important caveats to the way in which 'compensatory legitimation' works in the developing world. Firstly, he introduces the term 'external legitimation' to refer to "policy strategies which mobilise certain participants in the international system in order to bolster the legitimacy of the state in a given individual society" (1990a: 30). External legitimation refers to the state's reference to and support it marshals from external agencies, consultants and experts in mostly northern countries with the view to increasing the legitimacy and acceptability of policy. Of course, as I argued in Chapter Two, external influences, while aimed at giving credibility to state policy, could actually have a negative impact on policy.

Secondly, Jansen refers to 'defensive radicalism' as an instrument employed by states in the developing world to obfuscate the contradictory messages contained in curriculum policy (1990a: 31-32). With 'defensive radicalism' Jansen refers to the state's choice of a radical, even socialist curriculum discourse, but within an overall capitalist political economy. Defensive radicalism is "the propagation of a radical ideology in new states in order to legitimise its rule and activities in the face of unaltered material conditions" (1990a: 32). The ideological direction of the curriculum is thus undermined by a contradictory overall developmental approach. I argue below that South Africa's choice of curriculum policy conforms to this notion of defensive radicalism in that it gives expression to a 'radical' market-led discourse but within the context of an untenable market-led growth path. Curriculum 2005 succumbs to the human capital theory view that education and curriculum policy ought to play a leading role in creating a changed socioeconomic framework.

Thirdly, Jansen suggests that 'participation' as a vital instrument of legitimation of curriculum policy, ought to be central in understanding curriculum (1990a: 31). Participation is driven by the need for the state to obtain legitimation for its curriculum choice. I will show how the Curriculum 2005 policy process gave effect to the need for legitimation through participation while having to subject the policy outcomes to a predetermined agenda. I use the term 'managed participation' to describe the nature of the curriculum policy process.

5.3 School curriculum in context

Curriculum 2005 will be phased in over a number of years. It is intended to operate in all grades throughout the schooling system only by the year 2005[103]. Thus, the apartheid curriculum will de facto still be operational in schools for a long while. Having said this,

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[103]. There was ambiguity about the time schedule for phasing in the new curriculum. Under political pressure from teacher unions and politicians and the lack of resources, the Education Department has extended the implementation timeframe on a number of occasions. Instead of the original plan to implement it in four grades per year over a three year period (DoE 1996a), the curriculum was implemented in only grade one in 1998, and in grade two in 1999. Implementation has thus been delayed considerably.

I do not deny that there has been innovative work done by many teachers over the last two decades to generate a changed pedagogy. But, I am of the view that the apartheid curriculum will continue to have a decisive influence in shaping curriculum practices. This is the result of the impact the apartheid curriculum has had on teachers and schools. Any curriculum change has to contend with the pathology of the preceding approach, and would have to conceptualise curriculum implementation to deal with this pathology (Paterson and Fataar 1997: 6-8). The specific curriculum approach spawned by apartheid education, with its emphasis on a value-free pedagogical approach (van den Berg 1994: 37), trapped teachers into a rigid pedagogical framework from which their emancipation would have to be nurtured over a long period (see Jansen 1990b: 331-334).

The apartheid curriculum should be understood as part of the history of education and society in South Africa which I discussed in Chapter Three of this thesis. The political economy of racial capitalism interacted with and gave shape to education and the curriculum. The segregation of schooling is related to the specific development of South Africa's political economy since the advent of industrialisation in the latter half of the nineteenth century. The antecedents of curriculum are related to explanations which link education to social control and labour requirements. The rise of a racial ideology which governed education and schools found a systematic institutional form under apartheid from 1948. The advent of Bantu Education in 1954 represents the phasing in of mass state education for blacks (see para 3.3). Before then there has never been a coherently formulated education policy integrated into an overall strategy (Molteno 1984: 89). As part of the overall apartheid edifice Bantu Education "was to prepare young Africans 'psycho-ideologically' for the position in which the Bantustans placed them physically and politically" (Molteno 1984: 93).

The ideological origins of the apartheid curriculum can be traced to the doctrine of Christian National Education (CNE) and its more sophisticated successor, Fundamental Pedagogics (van den Berg and Meerkotter 1994: 300). Initially a protest discourse, Christian National Education arose in the context of the Afrikaners' struggle against British Colonialism and especially Milner's policy of anglicisation at the turn of the nineteenth century. The CNE policy adopted in 1948 had far-reaching consequences for all children in South Africa (Enslin 1984: 139-140). The CNE policy was applied differentially for whites than blacks. According to CNE policy, education for blacks should have the following features: mother tongue medium of instruction, it should not be funded at the expense of white education, it should not prepare blacks for equal participation in economic and social life, it should preserve the 'cultural identity' of the blacks, and it must be administered by whites (in Enslin 1984: 140).

CNE paternalistically viewed the christianising and civilizing of blacks within a subordinate position on the racial hierarchy as the sacred duty of Afrikaners in South Africa. van den Berg and Meerkotter provide a powerful summation of the manner in which CNE is a projection of a specific interaction between it (CNE) as a formative ideology and the broader emerging formative institutional segregationism (apartheid) when they state that

> ... CNE reflected the belief that the Afrikaners were the chosen people of God placed in South Africa to civilize and to Christianise the indigenous inhabitants: that this God-bestowed right and responsibility of trusteeship required all the trustees that they educate the indigenous peoples in the life and world view of the Afrikaners: and that the outworking of this trusteeship would be the recognition by the various groups within the country of their own separate nationhood, resulting in the transformation of the land area into a variety of states, one for each nation (1994: 299).

This ideological positioning of blacks intersected with the reproduction of suitable relations of production, i.e. the production and availability of unskilled and semiskilled black labour power to service the requirements of the racially segmented labour market (see para 3.3). The CNE policy, as an expression of the dominant ideology, served the purpose of legitimating a separate and inferior schooling system for blacks (Enslin 1984: 141). To put it in the language of this chapter's analytical framework, the politics of education and the curriculum that is represented by CNE can be described as an attempt to provide political and ideological legitimation for an emerging institutionalised racial hierarchy which served to buttress the attendant racial capitalist social structure that emerged since the late-1940s.

The educational philosophy, Fundamental Pedagogics (FP) was developed in the 1950s and 1960s as an attempt to mask the cruder language of CNE with a 'scientifically' justifiable theory of education. FP did not attempt to displace the inherent racial ideology of CNE (Enslin 1984: 141 and van den Berg and Meerkotter 1994: 300). FP's theoretical origins[104] can be traced to scholarship in Holland in the 1940s, and the employ of the phenomenological method (Beard 1981: 225-244). FP was elaborated into a 'science of education' by Afrikaner academics at the University of South Africa and the University of Pretoria (Enslin: 1984: 141). Most university faculties of education and colleges of education based their training of teachers on the FP educational philosophy (see van den Bergh 1994: 35-41). FP essentially embraced an attempt by the apartheid education planners and their intellectuals to develop a scientific, value-neutral and universally valid educational science (van den Berg 1994: 38)[105]. For its theoreticians, FP guides the educator to "accompany the child on the way to self-realization, but this realization must be in accordance with the demands of the community and in compliance with the philosophy of life of the group to which he (sic) belongs" (Enslin 1984: 142). As Kallaway succinctly puts it, FP has aimed to

> ... 'depoliticise' the field of educational studies - to find a language and a structure that would allow the appearance that the study of things educational had been taken out of the marketplace of ideas - of economic pressures, political conflict and ideological contestation (in van den Berg 1994: 38).

Through presenting FP as a universally valid educational science, apartheid education aimed to authenticate an authoritarian approach to education that fitted with the state's political agenda (van den Berg 1994: 38). Notwithstanding this agenda, FP has been remarkably successful in governing educational practice in most educational institutions in South Africa. FP provided the basis for teacher training at most universities and teacher training colleges. Teachers were immersed into a docile, paternalistic and authoritarian view of teaching (van den Berg and Meerkotter 1994: 302). The pedagogical style was mostly content-based driven and non-critical. There was very little scope for creativity and exploration. Educational success was determined by students' ability to imbibe pre-packaged content measured by a strict examinations-driven assessment mode. Only ideologically appropriate textbooks were prescribed and teachers had to follow a narrow syllabus. The curriculum approach of FP was clearly a 'curriculum as product' one, as opposed to and distinct from a 'curriculum as process' view[106], in terms of which strict control was exercised over schooling by the state.

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[104]. Beard and Morrow's edited collection 'Problems of Pedagogics' (1981) provides a number of philosophical essays on many aspects of Fundamental Pedagogics.

[105]. The descriptive summary of the theory of FP given here draws on the work of Enslin (1984 and 1990), Beard (1981), van den Berg and Meerkotter (1994) and van den Berg (1994).

FP to a large degree succeeded in constituting teachers' identities and school and classroom practices and relations along a narrow behavioural pattern. Teachers, who were trained on the basis of an authoritarian mode and immersed into this mode as teachers over decades, will have difficulty in shifting to a new identity of themselves as teachers. As Enslin puts it: "for in Fundamental Pedagogics we have not merely a false view of education and how to theorize it, but a practice which determines how teachers come to see themselves and their actions as teachers" (1990: 86). While many teachers opposed apartheid education specifically during the 1980s, this opposition was by and large aimed at politically deposing the apartheid state and apartheid education (see para 3.4). The majority of South Africa's teachers still teach on the basis of the traditional rote-learning pedagogical style. Consequently, the old pedagogical mode remains to this day the dominant one in determining classroom practices and relations. Despite the termination of apartheid, its educational and curriculum philosophy will still haunt education for a very long time.

Curriculum change theorists remind us that curriculum change, for reasons that have to do with the constitution of teacher identity, provision of new resources and the setting up of new management and administrative structures, should be conceptualised over a long period of time (see Jansen 1995a: 245-261 and 1995b: 1-12). One needs to ask why the Education Ministry has embarked on a curriculum policy that attempts to radically change the school curriculum and pedagogy over a relative short period. A 'politics of curriculum' analytical approach is appropriate in attempting to understand the underlying political and policy rationale of Curriculum 2005.

5.4 Curriculum and the policy process

There were two school curriculum processes in South Africa between 1994 and 1997. The first process which ran from August 1994 to December 1994 produced a revised curriculum that was implemented in schools from January 1995 (Greenstein and Mabogoane 1994: 17). This process produced what was described as 'essential alterations' which purged the existing textbooks and syllabi of racist and sexist content and attempted to bring the overall curriculum into line with the new constitutional and human rights framework (Tikly and Motala 1994: 6 and Jansen 1995b: 1-2). The second curriculum process ran from August 1995 and culminated in the announcement of Curriculum 2005 as curriculum policy in July 1997. Both processes were done under the auspices of the DoE, but differed markedly with regard to the organisation, control and nature of the policy process. In this section I will discuss the politics of these two processes in order to uncover the way in which the specific curriculum policy outcomes were developed.

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[106]. For an illuminating distinction between curriculum as process and curriculum as product see Meerkotter and van den Berg (1994: 4-6).

An understanding of the curriculum policy process should take into account the manner in which the transition to political democracy conditioned education policy making (see Chapter 4). The negotiated political dispensation procured a settlement that established a new set of conditions for the facilitation of capitalist accumulation in a reconstituted global political economy (see para 4.3). Public and education policy had to be made in this financially circumscribed context in terms of which radical policy positions had been severely compromised (see para 4.3). The constitutional dispensation protected the positions of apartheid-era bureaucrats who remained in control of key aspects of the policy process (see para 4.5.2.2), while conservative forces in civil society became dominant. This is the context in which curriculum policy was made. The government had to mediate among many contradictory and competing interests, and still project its own chosen policy vision. The government is not a neutral arbiter in policy making. Its vision to restructure the education system along global competitive lines had to take account of pressure to give credence to equity-based demands for radical educational transformation. These pressures played themselves out in the curriculum policy processes and it is to an analysis of these processes that I now turn. I first discuss the syllabus revision process and then turn to a longer, more in depth discussion of the Curriculum 2005 policy process.

5.4.1 Curriculum process one: syllabus revision

In August 1994 the Department of Education announced a curriculum process to develop interim core syllabi for all public schools (Tikly and Motala 1994: 6) based on revising and amending the existing school syllabi. The process had to produce syllabi that would serve as a core curriculum reflecting a democratic ethos, but without making radical revisions or incurring major financial expenditure. The important questions I attempt to answer revolve around why the Education Ministry embarked on such an approach, the politics of the process, and the relationship between the policy process and the outcomes of the syllabus process. Important in this regard is the outcome of the substance of the syllabus content as well as what implications the revision process holds for further curriculum policy. The syllabus revision process could be regarded as part of the broader contestation to capture the 'heart' of education policy in the South African transition and specifically the longer term curriculum process.

My analysis here draws primarily on the work of Seliti (1997), Hindle (1996) and Jansen (1995b). I also draw on interviews, especially with senior curriculum bureaucrats who were central in the process. The essential point of focusing on this syllabus review process is to locate the immediate policy antecedents of Curriculum 2005.

The following was the policy brief provided by DoE for the curriculum process:

- to eliminate inaccuracies in subject content, including outdated subject matter and contentious subject content;
- to consolidate a national core syllabus for all school subjects;
- to supply support material where major changes have been made to existing syllabi;
- amendments shall not necessitate new textbooks; and
- to include submissions made by the public (quoted in Seliti 1997:11).

The brief was interpreted by the revision committees to mean that insensitive, inaccurate and outdated material had to be removed from syllabi and textbooks (Jansen 1995b: 3). Despite criticism which questioned the legitimacy and lack of transparency of the process by professional subject associations (Seliti, 1997: 12) and as the sanctioning of cosmetic change (Gallie, interview 12/8/98), the DoE justified the syllabus review in the following manner:

> After the election and the installation of a new government the Ministry of Education was faced with a difficult situation as far as the curriculum was concerned ... The old syllabi were clearly unacceptable and could no longer be allowed to continue unchanged. Nonetheless, redevelopment of the new syllabi

> in a democratic fashion is a lengthy process and it could not be done before the beginning of the 1995 school year. Clearly some sort of interim solution was required (John Samuel, former Deputy Director-General DoE 1995, as quoted in Seliti 1997: 8).

The DoE ran a number of advertisements in the mainstream press which called for submissions and recommendations from the public with regard to the syllabus revisions (Tikly and Motala 1994:6 and Jansen 1995b:5). The then Director-General in charge of curriculum at national level who was centrally involved in curriculum policy since the early 1980s until the beginning of 1997, Dr Gustav Niebuhr, commented that the attempt to involve the public in the syllabus reform was the first such attempt in curriculum policy development in South Africa (Niebuhr, interview 19/8/98). More than eight hundred submissions were received. These came from teachers, students, and academic and professional associations (Seliti 1997: 11 and Hindle 1996: 6). Hindle commented that a substantial number of submissions were made as part of an orchestrated campaign around issues of language and religion. He mentions that over 300 submissions called for the retention of Christianity as a key curriculum focus (1996:7). If nothing else, the diverse nature of the submissions reveals that the syllabus revision process evoked passionate reaction and contestation. While public participation is regarded as an essential element of policy making, the contestation that it elicits provides the government with a challenge to mediate the concerns of the various contending groups in civil society. The submissions were sorted into two categories, those that the revision process could incorporate into its work and those that would be incorporated into the long-term process (Seliti 1997: 11-12 and Hindle 1996:7).

The politics of the process is revealed by locating its origins and control. The process was proposed and coordinated by the National Education and Training Forum (NETF). Established in 1993, the NETF was constituted by a wide-ranging number of education stakeholders that cut across the ideological spectrum. The NETF made decisions on the basis of consensus which rendered it a fractious body with a nebulous ideological identity. It divided its work into two foci, i.e. 1) the resolution of immediate short term educational crises under the aegis of the Short Term Issues Working Group and 2) the long-term restructuring of Education and Training under the Restructuring Working Group (para 4.6.2.1).

The syllabus review emerged from a proposal by the NETF's active Curriculum Technical Sub-Committee (Seliti 1997: 10). The proposal was a compromise decision which mediated between two divergent curriculum restructuring approaches. Debate in the Curriculum Technical Sub-Committee was divided on ideological grounds between those conservative groups who favoured the curriculum to be shaped along the lines proposed by the previous state's Curriculum Model of South Africa (CUMSA, 1991), and those progressive groups who favoured a more transformative and integrative approach (Hindle 1996: 4). The NETF decided on a short term approach to address the "rising imperatives for urgent curriculum changes for the 1995 school year" (Hindle 1996: 4), particularly given that a more fundamental curriculum process would take place over a much longer period.

The syllabus revisions were done in eleven Field and three Phase committees. The Fields centred around broad cognate areas with links to areas of employment (see Hindle 1996: 4). A Phase committee was established for each of the junior primary, senior primary and secondary school phases. Three coordinators were appointed from outside the DoE, two from teacher organisations and one an academic, to oversee the process (Hindle 1996: 5). Each coordinator oversaw the revision work in certain fields and phases. Each revision committee comprised of representatives from teacher organisations, school and tertiary student organisations and the National Education Conference (see para 4.6.2.1). The work of the committees suffered from two constraints namely: that the review had to be done on the basis of existing textbooks, and that the process had to be concluded in a three-month time period ready for implementation in January 1995 (Niebuhr, interview 19/8/1998). These constraints had a limiting influence on the extent and nature of the revisions.

An important consideration that throws light on the politics of the revision process is why the Ministry chose to endorse such a seemingly unorthodox curriculum policy process by placing it under the control of a civic grouping such as the NETF. As part of this consideration one needs to establish the rationale for endorsing a process with a limiting cosmetic brief that involves changing concepts and removing offensive content, in a context where expectations have been for radical curriculum change that goes beyond content to include changes in pedagogical mode. Jansen provides a partial explanation for the Ministry's decision. He asks why a "Minister of the majority party in a Government of National Unity would stake his reputation on, and lend support to, a bland and minimalist reform of the apartheid curriculum?" (Jansen 1995b: 3). While I believe this is the correct question I am of the opinion that his answer provides only a partial explanation which issues into a boycotting approach to policy. With this I mean that the logical consequence of Jansen's position would lead to a stance of non-participation in policy processes. This position does not take into consideration the specificity of the transition as essentially one dominated by a diffusive ideological direction. Policy contestation, in regard of the syllabus review process, represents an attempt by the Ministry to reconfigure the policy terrain away from the control of conservative bureaucratic forces that have maintained an influence after the 1994 election.

To make his argument Jansen points to two sets of pressure that the Ministry faced prior to the announcement of the revision process in September 1994. Firstly, he highlights a series of negative media publicity and damaging criticism by the NECC against the Ministry. The Ministry was criticised for its lack of leadership in resolving education crises and the lack of progress on the transformation of the system (Jansen 1995b: 6). Secondly, Jansen refers to the disabling effect on the delivery of educational transformation brought about by factors such as a conservative bureaucracy, the politics of reconciliation, the relative autonomy of provinces and lobbying by white groups. Jansen concludes that because of these pressures the Ministry chose to embark on the syllabus revision process in order to "legitimize a vulnerable Ministry of Education which lacked the political will to redirect educational and curriculum policies to reflect a broader vision for an alternative" (1995b: 10). Thus, according to Jansen, the process was not so much about curriculum change as it was an attempt to bring legitimacy to a malfunctioning and unpopular Ministry. Ostensibly, the control of the syllabus revision process by the widely representative NETF would lend the Ministry greater acceptance and legitimacy with an expectant educational community.

While Jansen gives a plausible analysis, and while I support the broad political rationale Jansen advances, he ignores the constraints that the transition placed on the Ministry's ability to initiate a qualitatively different policy approach. The biggest constraining factor that the sunset clause and the politics of reconciliation (see para 4.3) imposed on the transition was to entrench the positions of the senior apartheid-era bureaucrats. They had considerable control over the education policy process during the first years of the post apartheid period. They influenced the process in two ways: 1) by marshalling their expert curriculum knowledge to dominate the curriculum debates (Gallie, interview 12/8/1998), and 2) by vetoing or amending policy suggestions which they believed would be unviable to operationalise within existing bureaucratic structures and processes (Niebuhr, interview 19/8/98). They had a conservative influence on the curriculum process.

The administrative control of education after the election continued to reside under the Interim Committee of Heads of Education which comprised of all the heads of the old relinquishing departments and the new heads of newly constituted provincial departments. While it was necessary to keep on the outgoing heads to ensure bureaucratic continuity they too had a conserving influence on education (Hindle 1996:17). The conservative bureaucratic influence was at odds with the Ministry's intentions to develop a different educational agenda. This policy incongruence between the Ministry of Education and the Department of Education propelled the Ministry, who had political but not bureaucratic control, to seek ways to circumvent the influence of the bureaucrats in the DoE. Moreover, at that stage neither the White Paper on Education and Training (1995), nor the National Education Policy Act (1996) which provided a legislative framework that would determine the locus of policy control, were enacted. This meant that the Education Ministry still had to make policy in terms of the old apartheid policy structures. The NETF syllabus revision process provided the Ministry with a method to break the bureaucrats' stranglehold over curriculum policy. Thus, the representative nature of the NETF, incorporating teachers, students and other stakeholders, would be able to derive a reasonably legitimate process which could simultaneously address the criticism levelled at the Ministry for not delivering, while it would be in a position to neutralise the influence of the bureaucracy on the policy process. These bureaucrats still played a key role in the process but their influence was now subjected to the scrutiny of the NETF's constituencies.

However, the choice of the NETF by the Ministry was made on the naive assumption that the outcome of the syllabus revision would be universally acceptable and unproblematic. As I have mentioned above, the NETF was a body that had to develop, on the basis of a limiting brief, a consensus position on the syllabus. The process had to contend with a number of divergent policy influences and positions. Thus, the outcome of the syllabus revision process was ambiguous.

The process enabled participants and especially teachers to build capacity and expertise in curriculum development (Jansen 1995b: 8 and Gallie, interview 12/8/1998). Previously marginalised teacher unions were immersed into the centre of curriculum debates. Their representatives were introduced to the process via what Hindle terms a 'crash course' on curriculum (Hindle 1996: 23). However, due to time constraints the process suffered from a lack of consultation between the stakeholders and their constituencies. For example, teacher unions did not report back, nor discuss the revision process with their membership. Teachers in the classroom were thus kept in the dark until the product was announced. The process made no provision for broader consultation (Gallie, interview 12/8/1998).

The process was at first dominated by bureaucrats from the DoE whose curriculum expertise put them in an advantageous position to influence the process (Gallie, interview 12/8/1998). However, the active participation and vigilance of stakeholder representatives in the various committees diminished the influence of the bureaucrats. An example of an attempt by the bureaucrats to establish control was around the secretaries they provided for all the committees (Jansen 1995b: 6, Hindle 1996: 17 and Gallie, interview 12/8/98). These secretaries were senior subject specialists. Initially they actively participated in 'guiding' the committees' discussions. The teacher organisations were quick to question the 'inappropriate space' (Hindle 1996: 17) they occupied and from which they could influence discussions. A crisis meeting to address the secretaries' role resolved that they were strictly observers and recorders and that they could only participate on invitation.

Another area of active contestation centred around interpreting the brief that was meant to guide the process (Seliti 1997:11). The various committees gave differing interpretations to the brief given the nature of contestation in specific subjects and phases. Some subjects such as History, English and Geography were heavily contested. The History committee, predictably given the political and ideological contestation about what should constitute a core syllabus, witnessed vigorous contestation (Gallie, interview 12/8/1998). Other subjects such as Engineering and Home Economics were less contested (Hindle 1996: 8). These subjects were regarded as having relatively uncontentious content. A limiting feature of the review process was that it mainly concentrated on content. Issues of teaching approach and the infusion of critical thinking did not feature in the brief. However, some field committees did raise the issue of teaching pedagogy, the emphasis on content-based rote-learning and traditional assessment methodology as significant problems with the current curriculum framework. It was hoped that the longer term curriculum process would address these issues. Many of the content-oriented subjects were given flexibility with regard to cutting content (Hindle 1996:11).

Significant gains were made in areas such as religion, art and languages despite intense disputes. In religion, the multi-faith approach, i.e. where all major world religions are taught, was introduced alongside the existing single-faith approach. Pupils would thus be in a position to choose to attend classes in either of the two approaches. The overall religious education syllabus was now guided by principles such as tolerance and freedom of conscience. The arts syllabus was broadened by the inclusion of indigenous art forms. Language policy was altered in line with the Constitution, multilingual approaches were encouraged and the adoption of a communicative teaching style was promoted (Hindle: 1996: 12-14).

While the various subject and field committees prepared wide-ranging recommendations, these were watered down by the bureaucrats who had final control of the editorial process. Their influence caused much of the syllabus revision process to lapse into a narrow technical interpretation of the brief despite the type of challenges I described above (Jansen 1995b:8). While the process had subjected the bureaucrats to a participatory process in which they were unable to dominate proceedings, they still managed to leave an imprint on the outcome of the process (Gallie, interview 12/8/98 and Niebuhr, interview 19/8/1998). Another criticism of the process was that in opting for representative and organised stakeholder participation it ignored professional expertise especially of subject associations (Seliti 1997: 13). This omission, largely caused by the unresponsiveness of the subject associations than by political omission by the DoE (Seliti:

1997: 13), left the process devoid of very valuable curriculum and academic expertise.

The outcome of the process was limited to editorial adjustments that attempted to align the syllabi and textbooks with the new non racial and non-sexist political dispensation. Concretely this meant that schools would receive instructions to omit offensive language and concepts from the syllabi. (Jansen 1995b: 8 and Seliti 1997: 14) Many topics were reshuffled to integrate linkages to the African context. These were mostly done in an add-on manner (Gallie, interview 12/8/98). Many of the changes were based on the existing syllabi of the ex House of Assembly (white education) which meant that the former white department's syllabi had huge sway in the process. A weakness of the process was that in the absence of national legislation, curriculum policy remained a provincial competency. The provinces were thus not bound to implement the outcome of this national curriculum process (Hindle 1996:8). This led to a varied interpretation of the revision recommendations across the provinces (Faasen, interview 13/8/1998). Despite these criticisms, the changes amounted to the first concrete proposal to put forward a consolidated core syllabus that could be applied in all schools in South Africa (Hindle 1996: 9). This in itself was a major advance over the fragmented syllabi that had existed across the nineteen different education departments during apartheid.

The merits and demerits of the syllabus review process notwithstanding, my main concern is with the manner in which this process constructed the terrain for the second curriculum policy process, i.e. the Curriculum 2005 process. Hindle, as a then representative of SADTU on the revision process commented that

> ... this syllabus revision project has in no way hindered the move towards fundamental change, and has helped to purge some of the worst aspects of education under apartheid. In addition, progressive forces are now far better prepared to contest the real match than they would have been without this warm-up stage (Hindle 1996: 15).

The syllabus review process gave progressive educational forces some space within a limiting political environment to establish an open and participatory process to engage curriculum policy. They pinned their hopes from the start on a more long-term process which would give credence to the fundamental restructuring of the curriculum along the lines of an integrative approach as proposed by the ANC (Gallie, interview 12/8/1998 and

Hindle 1996: 27).

The Ministry sought to achieve increased legitimacy by endorsing the NETF syllabus process through which to circumvent the control of the old bureaucrats over curriculum policy processes. The Ministry has by and large attained legitimacy through the process's participatory approach, but the attempt to neutralise the bureaucrats have been less successful. The bureaucrats, partly by adopting a sophisticated non-confrontational style (Gallie, interview 12/9/1998), were still able to play a decisive role in the outcome of the syllabus review process. The process which produced Curriculum 2005 should be understood in the light of the outcome of the first curriculum policy process. However, more important, Curriculum 2005 should be viewed as a distinctive process which has its roots in the integration discourse advanced by the National Qualifications Framework (see Chapter Four). It is to an analysis of the production of Curriculum 2005, the main focus of this chapter, that I now turn.

5.4.2 Curriculum process two: the production of Curriculum 2005

I put forward the view that the development of Curriculum 2005 should be understood in relation to two main processes in which it was developed. The first process, between July 1995 and June 1996, centred around the adoption of the essential curriculum framework upon which Curriculum 2005 would be based. The second process ran from July 1996 to March 1997. This involved the production of learning area outcomes by learning area committees and the subsequent rationalisation of the learning area outcomes by a departmentally appointed technical committee. These processes reveal a 'managed participation' approach to the development of the curriculum which were driven politically by the need to signal on the one hand broad policy participation, while on the other hand having to deliver curriculum policy for the purposes of addressing the Education Ministry's legitimacy deficit.

5.4.2.1 Outcomes-based education as the essential curriculum framework

During July 1995 and June 1996 the curriculum process produced the essential conceptual framework on which Curriculum 2005 would be based. Outcomes-based education (OBE) was endorsed as the curriculum framework. As I have indicated in Chapter Four, OBE has its origins in a training discourse which was developed as a central part of the Education Ministry's preference for an integrated approach to education and training (see para 4.5.5). The other radical departure from the old apartheid-based curriculum is the integration of subjects into eight newly constituted learning areas. I will show that the genealogy of the learning areas is to be found in the curriculum restructuring thinking of the old apartheid-era National Department of Education's attempt to rationalise the curriculum across the fragmented education system since 1984 and which was contained in the 'Curriculum Model for Education in South Africa' (CUMSA 1991). I will elaborate below on the policy development process in order to illustrate how curriculum policy has come to acquire its specific policy meanings.

During 1995 and 1996 the Ministry of Education produced an array of legislation which impacted on curriculum policy. The WPET committed the Ministry to a

> ... fully participatory approach of curriculum development and trialing, in which the teaching profession, teacher educators, subjects advisors and other learning practitioners play a leading role, along with academic subject specialists and researchers. The process must be open and transparent, with proposals and critique being requested from any person or bodies with interests in the learning process and learning outcomes (DoE: 1995a: 27).

The WPET supported a transparent and inclusive participatory curriculum development process. However, as I show below, this type of participation was flouted in the curriculum process. The WPET endorsed the NETF syllabus review process and further supported the necessity of developing a progressive approach to curriculum change (DoE 1995a: 27) within an overall integration of education and training orientation under the NQF (DoE 1995a:15-16). The National Education Policy Act, promulgated in 1996, (DoE 1996f) removed the lack of clarity with regard to the level of government which has the legislative power to make curriculum policy. Until then the provinces could veto any curriculum policy made by the National DoE (see Jansen 1995b:8-10). The National Education Policy Act declares that the National Minister "may determine ... curriculum frameworks, core syllabi and educational programmes, learning standards, examinations and the certification of qualifications, subject to the provisions of any law establishing a National Qualifications Framework" (DoE 1996f:4). This gave the Ministry the capacity to develop national policy on curriculum which would be uniformly applied across all the provinces. Provinces retained control over matters relating to the implementation of the curriculum such as pilot programmes and the development of learning programmes and support materials (DoE 1997b: 42).

In August 1995 the National Department of Education established the Consultative Forum on Curriculum (CFC) which launched the school curriculum development process (DoE 1997b: 13). The CFC was not established without dispute. In early 1995 the DoE proposed that the curriculum policy process be located under a departmental committee. Through this proposal the bureaucrats in the DoE attempted to undercut the NETF's influence, acquired in the syllabus revision process, over the curriculum process. The Heads of Education Departments Committee's (HEDCOM)[107] initial acceptance of the proposal led to furious objection by the NETF who interpreted the proposal as a throwback to a bureaucracy-led process which the earlier syllabus revision process had attempted to neutralise (Seliti 1997: 16-17). At the centre of the dispute, once again, was an ideological battle over curriculum discourse. The bureaucrats favoured the curriculum model developed under the former state, the so-called CUMSA, while the NETF came to favour a transformative approach as suggested by ANC pre-election education policy documents such as the 'Implementation Plan for Education and Training' (Greenstein 1995: 9). The NETF rejected what they interpreted to be HEDCOM's narrow technical approach (Greenstein 1995: 9). The NETF succeeded in persuading the DoE to withdraw its proposal (Seliti 1997: 17). The DoE accepted a compromise position which led to the establishment of the Consultative Forum on Curriculum (CFC). This was seen as an interim measure until the curriculum policy development could be taken over by the National Institute for Curriculum Development (NICD). The White Paper on Education and Training (1995:27) makes provision for the establishment of an NICD. This body, however, has only recently (late-1998) been put in place and is not yet fully functioning. The reason for this delay is said to have been caused by a shortage of money and the lack of planning and development capacity (Botha, interview 20/8/1998). Thus, curriculum development was initially coordinated by the CFC which in turn was replaced by the National Curriculum Development Committee (NCDC) in late-1995 (DoE 1997b:

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[107]. HEDCOM was established by the Ministry of Education in 1995 as the main body for overseeing the development of education policy and structures. It consists of all the provincial Heads of Education and the national Director-General of Education. HEDCOM replaced the Interim Committee of Heads of Education Departments (ICHED).

13). Another body under the NCDC namely the Curriculum Management Committee (CMC) comprising of the national and provincial Heads of Curriculum was established in early 1996 with a brief of operationalising curriculum development (DoE 1997c: 15). The NETF hoped that a body such as the NICD would completely displace the apartheid-era bureaucrats. However, the CFC, NCDC and CMC, established as interim curriculum structures, managed to entrench the position and influence of the bureaucrats. A peculiar alliance between these (white) bureaucrats and the newly appointed (black) bureaucrats played a decisive role in the outcome of curriculum policy.

The first CFC meeting in August 1995 was attended by representatives from the national and provincial education departments as well as a range of education and training stakeholders. The stakeholders included teacher organisations, civic organisations and education providers such as Business South Africa, Publishers Association of South Africa, South African Board of Jewish Education, Joint Education Trust and the Independent Schools Trust (DoE 1997b: 13). There were no professional subject associations, student organisations or academics present at the meeting (Seliti 1997: 17-18). The meeting resolved to launch an investigative and consultative process around the curriculum framework. The CFC, thus, commissioned two investigations to consider: 1) the appropriate structures and processes for the establishment of National and Provincial Institutes for Lifelong Learning and 2) curriculum frameworks outlining the broad implications of the NQF and an outcomes-based approach for the General and Further Education Bands (DoE 1997c: 7-8). Two documents were produced for discussion[108]. All interested parties were invited to respond to these documents by March 1996. Responses were received from various civic, professional and other bodies (Niebuhr, interview 19/8/1998). The responses were considered by the National Curriculum Development Committee (NCDC), the body that replaced the CFC in October 1995. However, these responses did not seem to have much influence on the curriculum framework proposals (Botha, interview 20/8/1998). This suggests that the substance of the curriculum framework had already been predetermined, and that the stakeholder process would be used to elaborate on, modify and ratify it. An examination of the favoured curriculum discourse, which I will discuss below, shows that the main conceptual pillars of the curriculum have been imported from outside the curriculum process. Nevertheless, in June 1996 the NCDC felt confident enough with the participatory nature of the stakeholder process to declare that "consensus was reached on an Outcomes-Based Lifelong Learning Development Framework for South Africa" (DoE 1997c: 8).

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[108]. The document which focused on curriculum structures was put on the backburner and would later inform the establishment of curriculum structures such as the NICD. The document on 'curriculum frameworks' became the key one that informed the curriculum discourse.

The pedagogical underpinnings of Curriculum 2005 are the outcome of a number of complex antecedent developments which had already started in the mid-1980s. Curriculum 2005 has its discursive roots in the integration agenda that dominates the NQF. As I argued in Chapter Four, the NQF is the result of a convergence in thinking by business, labour and the state in support of the integration of education and training. The essential thinking of the NQF was developed by the National Training Board and elaborated upon by the Inter-Ministerial Working group in 1995 (see para 4.5.3). The concerns of training workers for occupational mobility trumped the pedagogical concerns of education (see para 4.5.3). Supporters of the NQF see integration as giving effect to education as a lifelong process which allows all citizens to participate in the formal education and training system. However, objections from the education sector such as that by the Committee of University Principals regard the integration discourse as an attempt to stifle academic freedom and as failing to "reconcile the differences between students with manual training, and those with formal academic training who are working towards the same qualification" (Greenstein 1995: 8). Notwithstanding these type of objections, the NQF[109] supplied the essential principles, based on the imperatives of a narrow training agenda, for school curriculum development.

The NQF endorses an Outcomes-based pedagogical approach as the key defining feature of an integrated education and training system (DoE June 1995: 11). An important NQF document released by the inter-ministerial working group in June 1995 and which played a fundamental role in shaping school curriculum thinking (Botha, interview 20/8/1998) declares that "the NQF hinges on an outcomes-based approach to education and training" (DoE 1995f: 11) The document emphasises that OBE would be the basis for all curriculum development processes (DoE 1995f:11). OBE takes as its starting point the intended culminating outputs of learning. This is different from a model which grounds the organisation of learning on defining teacher input in terms of syllabus content. Thus, OBE requires a shift from focusing on teacher input to the outcomes of the learning process. Curriculum documents announced OBE as representing a paradigm shift in curriculum pedagogy (see DoE 1995f: 11, DoE 1997b: 32, HSRC: 1995: 34 and DoE 1997c:5). The NQF document contends that in OBE a learner's progress would be measured against criteria which have been stipulated prior to the learning process. Criterion referencing would replace norm referencing. This implies that learning would be assessed in terms of the learner's individual development and not as in norm referencing where the learner's performance is assessed in comparison to other learners (DoE 1995f).

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[109]. I gave an analysis of the NQF in Chapter Four. I will here only provide an account of those elements of the NQF that relate to Curriculum 2005. I am here concerned to show where the central concepts of Curriculum 2005 have been derived from and the impact this has had on the curriculum policy process. I discuss the epistemological basis of OBE in the next section.

The OBE discourse depended heavily on 'policy borrowing' from different international contexts especially from New Zealand and Australia (DoE 1995f), but also from countries such as Canada, Scotland and the United States of America (Niebuhr, interview 19/8/1998). The influence from Australia and New Zealand came via the active interaction between those countries' labour movements and COSATU during the late 1980s and early 1990s. Under their influence COSATU developed a preference for a 'high skill-high participation' human resource development model which favours a curriculum approach with greater linkages to skills training (NECC 1993b). The integration of education and training became embedded in current curriculum discourse through the active lobbying of the trade union movement. The ANC's pre-election document 'A Policy Framework for Education and Training' (ANC 1994) and the government's White Paper on Education and Training (DoE 1995a) underscored labour's approach (see para 4.5).

Policy borrowing is particularly apparent in the NQF's approach to defining outcomes. The NQF's essential outcomes, which later came to be called critical cross-field outcomes, are based on an adaptation from the outcomes approach developed in Australia's Mayer Committee Report published in 1992 (DoE 1995f: 12). The Australian outcomes approach suggests that essential outcomes should be cross-curricular, essential and generic to work, be developed for application in a variety of education and training settings and should focus on application (from the Mayer Report quoted in DoE 1995f: 13). A strong training discourse is prevalent in the Australian approach which had a considerable influence on the development of OBE in South Africa. However, South Africa attempted to develop a broader notion of essential outcomes in order to address the fear that narrow outcomes "could emasculate the profound meaning and power of effective education" (DoE 1995g:29). The attempt to broaden the conception of outcomes was probably done in reaction to criticism by educationists that OBE is narrow and technicist (see HSRC 1995). The NQF document prescribed that essential outcomes be developed by curriculum processes on the basis that they have to inform all other levels of outcome and that outcomes should reflect the South African context (DoE 1995f:13).

The NQF document proposed eleven outcomes (DoE 1995f: 13) which were later re-ordered by the South African Qualifications Authority (SAQA) into seven critical cross-field outcomes and five developmental criteria (DoE 1997b: 34-35). The critical cross-field outcomes are:

- Identify and solve problems in which responses display that responsible decisions using critical and creative thinking have been made;
- Work effectively with others as a member of a team, group, organisation, community;
- Organise and manage oneself and one's activities responsibly and effectively;
- Collect, analyse, organise and critically evaluate information;
- Communicate effectively using visual, mathematical and / or language skills in the models of oral and / or written presentation;
- Use science and technology effectively and critically, showing responsibility towards the environment and health of others;
- Demonstrate an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation (DoE 1997b:34).

The five developmental criteria are intended to serve as 'pedagogical guides' for classroom practice (Gallie, interview 12/8/1998 and Botha, interview 20/8/1998). These five criteria are regarded as additional regulations for the attainment of the critical cross-field outcomes (DoE 1996c: 11). These are:

- reflecting on and exploring a variety of strategies to learn more effectively;
- participating as responsible citizens in the life of local, national and global

communities;

- being culturally and aesthetically sensitive across a range of social contexts;
- exploring education and career opportunities;
- developing entrepreneurial abilities (DoE 1996c: 10).

Critical cross-field outcomes are regarded as working principles, and as such should direct teaching, training and education practices and the development of learning programmes and materials. All curriculum development should thus be based on these outcomes. Thus, the critical cross-field outcomes would underpin the learning process in all its facets (DoE 1997b: 34).

The second level of outcomes which the NQF established is what has been termed as 'specific outcomes'. These outcomes are contextually demonstrated knowledge, skills and attitudes that reflect the critical cross-field outcomes (DoE 1995f: 13). The specific outcomes would guide assessment of the progress of learners. Specific outcomes are regarded as the building blocks which enable learners to achieve overall competence in a field at a given level or degree of sophistication (DoE 1995f: 13, DoE 1997b: 35-36).

The introduction of learning areas is the other fundamental departure from the old curriculum. The idea of learning areas did not feature in the curriculum principles laid down by the inter-ministerial NQF working group (the group that developed the NQF framework). Learning areas make their first appearance in post apartheid education policy documents in the CFC mandated discussion document entitled 'Curriculum Framework for General and Further Education and Training' (DoE 1995g). I referred to this document earlier in my discussion of outcomes. The curriculum framework as outlined in this document was approved by the Council of Ministers (CEM) in February 1996 as official curriculum policy (DoE 1997c: 22) after a curriculum consultation process which involved all stakeholders.

'Learning areas' are informed conceptually by the idea that the compartmentalisation of knowledge into narrow subject boundaries prevents learners from seeing the interconnectedness of knowledge (Seliti 1997). Learning areas are regarded as an attempt to present knowledge in an integrated manner around broad cognate areas such as the natural sciences or the economic sciences. Most criticism about the move to learning areas came from old subject based professional bodies who feared that their subjects would be marginalised (Seliti 1997: 31-36). My focus on learning areas here does not touch on the merits or otherwise of moving to learning areas. I am concerned to show from where the discourse of learning areas was imported into Curriculum 2005. My view is that learning areas were brought into policy by the apartheid-era curriculum bureaucrats who drew on the CUMSA, the apartheid state's curriculum model. This illustrates the influence the apartheid- bureaucrats had on the curriculum policy process.

The policy antecedents of the CUMSA can be traced to as far back as 1984 when the then National Department of Education set out to rationalise and unify curricula across the different racially based education departments. This was in line with the De Lange Commission's proposal that a single education ministry be established based on a strong vocationally orientated education system (Kallaway 1984: 26). Attempts at curriculum rationalisation occurred throughout the 1980s. The process was hampered by bureaucratic inertia and a political unwillingness by the then racially and ethnically based education departments to subject themselves to the DNE for fear of a loss of autonomy (Niebuhr 19/8/1998). Dr Gustav Niebuhr, one of the main architects of CUMSA and also regarded as the 'father of the learning areas' (Gallie, interview 12/8/1998 and Faasen, interview 13/8/1998) in Curriculum 2005, commented that the CUMSA could not be implemented then because of a political unwillingness to unify the curriculum. The apartheid state, however, resurrected the CUMSA in 1991 by advancing it as its preferred curriculum proposal. The CUMSA was released together with the Educational Renewal Strategy (1991) to form the apartheid state's education policy proposals in the negotiation period during 1990 and 1994 (see Christie 1993 and para 3.4). Progressive education organisations were keen to sideline the education policy package of the apartheid state on the grounds that it attempted to entrench racial privilege. During the syllabus revision process in 1994 the NETF's subcommittee on curriculum actively attempted to sideline the CUMSA document. However, the presence of the apartheid-era bureaucrats meant that much of the thinking that underpinned CUMSA was taken up in Curriculum 2005 (Niebuhr, interview 19/8/1998).

The CUMSA proposals came out of the broader reformist attempts by the apartheid state during the 1980s to align the education and training system with the world of work. One of the main underlying principles of the CUMSA is

> ... that the provision of education shall be directed in an educationally responsible manner at the needs of the individual and those of society, and the demands of economic development, and shall take into account the person power needs of South Africa (DoE 1991: 7).

The CUMSA suggested that this would require "a paradigm shift from predominantly university-oriented education toward more vocationally-oriented education" (DoE 1991: vi-vii). The two main pillars of the CUMSA proposal which sought to give effect to achieving demands for greater relevance with life outside schooling, were: 1) the identification of seven fields of study namely languages, mathematics, natural sciences, social sciences, arts, technology and lifestyle education (DoE 1991: 19) and 2) the identification of six broad vocational fields namely: engineering, business, arts, agriculture, utility industries and social services, in order to make provision for vocational education (DoE 1991: 20). While the seven fields of learning would form the basis of the broad curriculum, the six vocational fields would be given prominence in each of the fields of learning in order to prepare learners for the transfer to vocational education, apprenticeships or in service training programmes (DoE 1991: 20-22) which would follow in the post compulsory schooling phase. Dr Niebuhr suggested that there is a strong chance that the idea of fields of learning might have been brought into CUMSA by departmental curriculum experts who studied the vocationalisation of education in Britain during the 1980s (Niebuhr, interview 19/8/1998).

The idea of fields of learning was taken up directly in the 'Curriculum Framework for General and Further Education and Training' document commissioned by the CFC and accepted as policy by the Council of Ministers. 'Fields of learning' were called 'areas of learning' in the Curriculum Framework document. This document proposed ten areas of learning (see DoE 1995g: 37) which were eventually reduced to the following eight: 1) Language, Literacy and Communication; 2) Mathematical Literacy, Mathematics, and Mathematical Sciences; 3) Human and Social Sciences; 4) Natural Sciences; 5) Technology; 6) Arts and Culture; 7) Economic and Management Sciences; and 8) Life Orientation. The only difference between Curriculum 2005's eight learning areas and the CUMSA document of 1991 is that the former added Economic and Management Sciences as another learning area. The other seven learning areas are the same as the seven CUMSA fields of learning.

The Curriculum Framework document elaborates that learning areas, while they may be reminiscent of knowledge areas in past curricula, were deliberately chosen to suggest the tentative boundaries of knowledge (DoE 1995g: 35). The approach seeks to adopt as integrated an approach to knowledge as possible. The attempt in March 1997 to cluster specific outcomes from the different learning areas into learning programmes was aimed at integrating knowledge across the learning areas (DoE 1997c: 30). Thus, the fact that learning areas have been constituted does not imply that learning programmes will be based on discrete entities. On the contrary, the approach followed is that it should be "possible to integrate some or all of these areas into a single, integrated project" (DoE 1995g: 35-36).

In sum, the development of the underlying curriculum framework of Curriculum 2005 has been shaped by the importation into the curriculum policy process of its two pivotal conceptual features, i.e. OBE and learning areas. Learning areas were brought into the curriculum from the international context via the CUMSA document, and OBE was brought into the curriculum process via the training-led agenda of the NQF. The curriculum process, which produced the policy framework on which Curriculum 2005 would be based, being stakeholder driven, in which the apartheid-era bureaucrats had a big influence, served essentially to ratify a predetermined curriculum discourse. This curriculum framework was shaped between July 1995 and June 1996. I will now go on to an analysis of the next curriculum process during which the learning area outcomes, range statements and assessment criteria, among others, were produced.

5.4.2.2 The politics of curriculum and managed participation

The second phase of the curriculum policy process ran between July 1996 and March 1997. Greater participation in the process was effected through the establishment of eight learning area committees (LACs) which were tasked by the DoE to develop certain key features of the OBE framework within the learning areas. The LACs' work was 'rationalised' by a ministerially appointed technical committee. The process was coordinated by the National DoE. I will focus in this section on the nature of the policy process in this period in order to understand the relationship between the process and curriculum policy outcomes. I use the term 'managed participation' to refer to the way in which the participation process was managed by the DoE in order to have the curriculum policy conform to two political imperatives namely: 1) the political pressure brought onto the process by the Education Ministry to use curriculum policy as a means of 'signalling' radical change and 2) the need to have the school curriculum conform to a training-led curriculum discourse. While curriculum participation was accommodated (the WPET decreed the need for participation), the nature of the participatory process turned into a technicist one in which political imperatives played the major role.

The DoE commenced with the policy process at the end of July 1996 with a view of implementing the new curriculum in the General Education and Training phase of schooling in 1998 (DoE 1997b:28). As I have argued in the previous section of this chapter, the main features of the new curriculum were imported from outside the curriculum process and presented as non-negotiable at the next phase. OBE as the curriculum approach and adoption of the eight learning areas have been declared as the cornerstones of the curriculum. The process from July 1996 onwards did not allow participants to raise critical objections to the new approach. Sieborger, a participant in the Human and Social Studies Learning Area, comments that questions regarding the removal of subjects were forbidden in discussion (Sieborger 1997: 2). Participants in the LACs complained that they came into the process 'blind' without knowledge of the curriculum framework process that went before (Bam, interview 11/8/1998). Many commented that they had to undergo a 'crash course' in OBE in order to make meaningful contributions in the LACs (Gallie, interview 12/8/1998). The LACs were given very little guidance about the basis and direction of their work. Initial discussions in the Human and Social Studies LAC, for example, was only based on a Dutch book on OBE (Sieborger 1997: 5).

The process was controlled by the Curriculum Management Committee (CMC) of the DoE. Sieborger describes the make up of the LACs as having been based on a "strict adherence to stakeholder representation" (Sieborger 1997: 2, see also DoE 1997a: 27 for a list of the stakeholders). The stakeholder process operated at three hierarchical levels (Sieborger 1997: 2) which determined the influence and sway the different stakeholders had over the process. The process was meant to be based on discussion, persuasion and consensus. The primary stakeholders were the representatives of provincial and national education departments. Provincial bureaucrats influenced the direction of discussion in the LACs when they raised implementation problems which certain proposals might cause (Sieborger, interview 7/8/1998). The national bureaucrats' influence was derived from the curriculum expertise they could muster and the knowledge of bureaucratic line-functioning (Bam, interview 11/8/1998). The National DoE, unlike the other groups, always had more than two representatives in the LACs (Sieborger 1997: 2). The secondary stakeholders were the teacher organisations which had two representatives each per LAC. Their representatives participated vigorously throughout the process, but their lack of curriculum development expertise often put them at a disadvantage in sophisticated curriculum debates. Gallie, a senior SADTU official, commented that SADTU representatives were unprepared for participation in the curriculum process. He attributes this to the lack of a culture of policy engagement among black teachers. SADTU's representatives participated without a clear idea of the direction of the process (Gallie, interview 12/8/1998). The third level of stakeholder participation was made up by non-governmental organisations, professional associations and colleges, universities and technikons, which had one representative each. These groups provided much needed curriculum development knowledge and expertise, but their views were "sidelined in certain crucial decisions on the basis that they did not represent teachers, and that they speak only for themselves" (Lotz, interview 18/8/1998).

The stakeholder process of curriculum development collapsed into a consensus-making model dominated by the convergent interests of the more powerful stakeholders. Having to deliver a curriculum product in a very limited time period proved to be the most powerful political imperative which shaped the LACs work. Each LAC had to produce between September and November 1996 the following: a learning area rationale, the learning area outcomes and the specific outcomes[110], assessment criteria and the focus rationales (DoE 1997c: 29). The LACs met over two week-long sessions. The format of the sessions was made up of a combination of plenary and LAC working group sessions.

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[110]. Learning area outcomes are broad statements about the outcomes that relate to learning areas, while the specific outcomes are derived from these outcomes and are context specific (DoE 1997b: 27).

At the plenaries, usually held in the mornings, the members of all the LACs would come together to be briefed by DoE officials about the overall process. The sessions were characterised by hard work and intensive deliberation that often went on late into the night (Bam, interview 11/8/1998). The learning area curriculum process started off with a strong commitment to democracy and representation (Sieborger 1997: 2 and Kruss 1997:6-7). A good working atmosphere was created and LAC participants seemed pleased to be able to contribute to the curriculum process (Lotz, interview 18/8/1998). LAC members initially got to know each other, lists of outcomes were generated and rigorous work was done in small group discussions. Members had the sense that they were involved in something important and meaningful which would determine the future of education in South Africa (Sieborger 1997: 4). The process, however, became frayed the longer it went on, with Sieborger claiming that it suffered from the "progressive diminution of broad representivity as time went on" (Sieborger 1997: 2). Under pressure to produce, discussion became much more contested and antagonistic (Lotz, interview 18/8/1998). By the end of November 1996 the LAC process had produced over five hundred learning area outcomes (DoE 1997c: 29).

The process suffered from a lack of democratic consultation by the stakeholders with their constituencies. Participation was supposed to be based on representative democracy which would have meant that participants in the process had to represent the interests of their constituencies. Participants were meant to report back to and consult with their constituencies to receive fresh mandates about the nature and direction of the curriculum process. However, time constraints and a political unwillingness by the DoE to broaden participation prevented the stakeholders from consulting with their constituencies (Gallie, interview 12/8/1998 and Bam, interview 11/8/1998). The stakeholder participation thus deteriorated into a curriculum process that took place within smoke-filled committee rooms (Bam, interview 11/8/1998), delinked from broader teacher and public participation. Kruss suggests that this process has rendered teacher stakeholder representatives "as mere rubber stamps for decisions made elsewhere" (Kruss 1997: 13). This had the effect of marginalising teachers from the new curriculum policy.

The most important factor in determining the outcome of the curriculum process was the role played by the national DoE bureaucrats. By mid-1996 the DoE began to employ black, politically acceptable bureaucrats in senior departmental positions. The apartheid-era bureaucrats were kept in their positions with the declared task of inducting the new bureaucrats into their jobs (Niebuhr, interview 19/8/1998). Many of the apartheid-era bureaucrats who had resigned from the DoE were re-employed on contract to facilitate the transfer of control to the new incumbents. (Gallie, interview 12/8/1998). Thus, from about mid-1996 to about mid-1997 the DoE's senior management was made up of a number of new incoming officials and outgoing officials.

The new bureaucrats in the curriculum section were appointed more for their political commitment to educational change rather than curriculum expertise. For example, the newly appointed Senior Director in charge of curriculum in the DoE, was a union activist with a strong commitment to the integration of education and training and the development of workers' skills. He had little expertise in school curriculum (Gallie, interview 12/8/1998). Other appointees had a similar lack of curriculum expertise. These new bureaucrats brought a strong political commitment to the curriculum process which resulted in their passionately exhorting LAC participants to finish the process within the specified time limit (Bam, interview 11/8/1998). Nicol Faasen, former Director of Curriculum Services in the Western Cape Education Department recalls the impassioned plea made by the Senior Director of Curriculum for commitment to the process at the first plenary of the LAC process thus: "this process must be an answer to all the lives of my comrades lost in the struggle for justice in South Africa" (Faasen, interview 13/8/1998). While this person's lack of curriculum knowledge often led to embarrassment, he was effective in "mustering the troops and cracking the political whip" (Faasen, interview 13/8/1998). The Senior Director of Curriculum was under political pressure from the Education Ministry to produce the school curriculum policy (Niebuhr, interview 19/8/1998, Botha, interview 20/8/1998 and Faasen, interview 13/8/1998).

The outgoing and incoming bureaucrats had very early on in the LAC process come to an understanding about their different, but complementary roles in the curriculum process. The incoming bureaucrats would drive the process politically and imbue it with the necessary political legitimacy, while the outgoing bureaucrats would be the technical managers of the process (Niebuhr, interview 19/8/1998 and Botha, interview 20/8/1998). All my other interviewees concurred with this view (anonymous incoming bureaucrat, interview 2/9/1998; Gallie, interview 12/8/1998; Lotz, interview 18/8/1998; Bam, interview 11/8/1998).

There were two important consequences that resulted from this managed participation approach. The first revolves around the political pressure on the process. This led to endless complaints by LAC participants that the quality of their work was being compromised (Lotz, interview 18/8/1998), as well as criticism from SADTU who decried the lack of consultation with ordinary teachers as a major weakness. SADTU commented in November 1996 that "currently the process is driven by the bureaucracy but there should be greater involvement of teachers and students. SADTU argued for better planning and participation to be possible the deadlines should be shifted to allow more time for the process to unfold" (quoted in Kgobe 1996:7). Needless to say the call for extension of time deadlines was ignored. The time constraints had all but destroyed the need expressed by the WPET to develop the new curriculum on the basis of a transparent participatory process.

The second consequence of the managed participation approach was that the outgoing apartheid-era bureaucrats retained influence over the curriculum policy process. In their newly acquired sophisticated and non-confrontational style they managed to influence the substance of the curriculum debate. They acted as scribes in many of the LACs, provided required information on curriculum issues, and clarified the functioning of the bureaucracy. While they did not have control over the structure and timing of the process, their 'technical' control influenced the nature of the curriculum discourse and thus had a major impact on the outcome of curriculum policy (Bam, interview 11/8/1998 and Gallie, interview 12/8/1998).

The intensive work done by the LACs under tremendous constraints of time and a lack of broader consultation was narrowed down substantially by a technical committee appointed through legislation by the DoE. The Technical Committee on Standards and Frameworks for Learning Programmes (TC) was established with the job description of ensuring that "the new learning programmes to be implemented are in compliance with the outcomes-based approach of the NQF" (DoE 1997c: 29). The TC was made up of fourteen members, five from the provinces, one from the national DoE and one representative from each of the LACs (Govender et al. 1997: 12). The TC was actively assisted in its work by international consultants (Govender et al 1997: 12).

There was much objection from LAC representatives at the establishment of the TC which they felt would undermine their work. Botha, the senior outgoing bureaucrat in charge of the technical functioning of the curriculum process was opposed to the TC on the grounds that the LACs would feel aggrieved at this interference and that the sense of genuine participation would be destroyed. Botha claims to have relayed his and the LACs' objections of the establishment of the TC to the CMC and DoE (Botha, interview 20/8/1998) and that this had pressurised the DoE to address the objections. Subsequently a Reference Group was established in late January 1997. This body consisted of LAC representatives and practising teachers nominated by the learning areas (DoE 1997c: 30). The Reference Group had to act as an advisory group to the TC. The TC did its work during February and March 1997. The TC reported back periodically to the Reference Group to 'take advice' from the latter (Bam, interview 11/8/1998). The Reference Group was established primarily with the view to legitimise the rationalising work of the TC without which the new curriculum might have been stillborn (Bam, interview 11/8/1998 and Botha, interview 20/8/1998).

The TC was established unilaterally by the DoE on the 'advice' of the newly constituted SAQA in order to bring the school curriculum process in line with the NQF (Botha, interview 20/8/1998). The SAQA had in turn taken advice from Canadian consultants (Sieborger, interview 7/8/1998 and Vally and Spreen 1998: 5) which influenced them to reduce the LAC generated outcomes. Legislation for the establishment of the SAQA was passed in 1995 but it only began to function as a fully constituted body by mid-1996 (Govender et al. 1997: 11). School curriculum development started before the SAQA became operational. Senior curriculum bureaucrats such as Niebuhr, Botha and Faasen all concur that the curriculum development process, while deriving its principled basis from the NQF and while it was generally aligned with NQF thinking, ran parallel to the NQF developmental structures that emerged out of the inter- ministerial working group (Botha, interview 20/8/1998, Niebuhr, interview 19/8/1998 and Faasen, interview 13/8/1998). The school curriculum was developed under the Curriculum Section of the DoE. The establishment of the TC thus represents an attempt by the SAQA to bring the curriculum development process under the aegis of the training-dominated discourse of the NQF. This is regarded by the SAQA as a crucial element in ensuring that the school curriculum is commensurate with the integration of education and training (see para 4.6). While the establishment of the TC was an attempt to enact the SAQA's imprint over the school curriculum, it caused the curriculum process to be narrowed down considerably in the interest of achieving integration of the curriculum within a training dominated discourse.

The TC rationalised the LAC generated outcomes from over five hundred to sixty-six learning area and specific outcomes (Sieborger, interview 1997: 4-5). The LACs felt aggrieved at this because they were at the outset of their process never given any limitations with regard to the number of outcomes they would be required to develop. LACs felt that had they been given a limitation they would have been able to devise much better and more comprehensive outcomes (Lotz, interview 18/8/1998 and Sieborger 1997: 5). The TC thus had acquired much influence over the determination of what could count as an outcome. However, in the process of rationalising the outcomes the TC lost much of the "texture and richness" (Sieborger 1997: 5) that characterised the LACs' outcomes. In search of simplicity and uniformity the TC developed assessment criteria, performance indicators and learning programmes. The TC thus closed down flexibility and space for teachers to develop their own outcomes and learning programmes. As a result of this Sieborger felt that "South Africa had elected to follow the example of countries which laid down a national set of outcomes for teachers and learners to 'achieve'" (1997: 5). Thus, the TC process gave definitive meaning to OBE. It had conclusively derived a particular model of OBE, one which narrowly circumscribed the achievement of predetermined outcomes as the pivot of classroom pedagogy. Through the TC process the training discourse trumped any notion of an open democratic pedagogy for the school curriculum.

The newly proposed school curriculum policy was publicised for comment in March 1997. The document entitled 'Outcomes-based education in South Africa: Background Information for Educators' (DoE 1997b) provided a detailed elaboration of the conceptual underpinnings of Curriculum 2005 including explanation regarding the NQF, OBE, critical cross-field outcomes and learning areas. Another document entitled 'Call for Comments on the Draft Statement on the National Curriculum for Grades 1-9' (DoE 1997e) published in June 1997, provided the rationales, specific outcomes, assessment criteria and range statements for all the learning areas. Curriculum 2005 was adopted as state policy in July 1997 for implementation in 1998 (Botha, interview 20/8/1998).

Curriculum 2005 was produced during two interrelated processes which were governed by a managed participatory approach in which predetermined political imperatives played the major role in shaping curriculum policy. The process was managed to conform to the Ministry of Education's twin objective of delivering a curriculum policy that would 'signal' educational change on the one hand, while having to bring the school curriculum in line with the narrow training discourse of the NQF on the other hand. I now move on to a consideration of the epistemology of OBE. I argue that its human capital theory view of curriculum and knowledge is anti-educational and therefore provides an untenable basis for school curriculum and pedagogy in South Africa.

5.5 Questioning 'outcomes' as the epistemological foundation of Curriculum 2005

There are many epistemological issues embedded in Curriculum 2005 which are in need of robust theoretical analysis. One such issue is the integration of subjects into learning areas. Many countries have gone back to subjects after experimentation with learning areas (see Boyd 1979). Another prominent feature in the new curriculum in need of careful analysis is 'child-centred learning'. This pedagogical approach has been subjected to a long history of experimentation and research. Curriculum 2005 endorses a simplistic notion of this concept (see DoE 1997b: 8). Two other epistemological issues that deserve theoretical analysis are: the relationship between content and outcomes, and the role of values and ideology in curriculum. I, however, will in this section focus on OBE as the foundation of Curriculum 2005. I consider the extent to which OBE is constitutive of an attempt to find a curriculum approach that gives effect in the classroom to a closer fit between education and the world of work. In other words, I consider OBE in relation to a re-emergent human capital theory (HCT) discourse that has characterised the 'globalisation' of education during the last two decades (see para 2.5.7). The main claim I make in this section is that the OBE model favoured by South African policy makers embodies a very constricting understanding of outcomes which runs contrary to the nurturing of democratic classroom practice.

OBE's originated in three different international and comparative contexts namely North America, Australia and New Zealand (Killan 1996: 2). In Australia and New Zealand OBE was part of a broader package of aligning these countries' education systems with the need to achieve economic integration in the global economy (Killan 1996: 3). South Africa' s adoption of the NQF and OBE was largely based on these countries' educational models (see para 4.5.4). OBE in South Africa could be said to have found 'external legitimation' (Jansen 1990: 29) through curriculum policy borrowing from the international context. The OBE curriculum discourse in the USA and Canada emerged in response to the pervasive demands there during the 1980s for the qualitative improvement of their education systems. The infamous 1983 report of the National Commission on Excellence in Education declared the USA to be a "nation at risk ... whose educational foundations ... are presently being eroded by a rising tide of mediocrity that threatens our very future" (quoted in Manno 1994: 4). A contentious debate focused on the need to address the cause of weak educational achievement. The political context for the prominence of OBE was the need to demonstrate greater accountability with regard to educational achievement to parents as 'educational consumers' (Boyd et al. 1996: 351). A powerful influence in OBE was the need to imbue schooling with the capacity to produce students that could face "stiff competition from workers in the rest of the world, which means we must educate ourselves and our children as we have never seen before" (Manno 1994: 6). Furthermore, in the USA, OBE has been subjected to a vicious political war of words between the religious right and supporters of OBE[111]. The religious right accused OBE supporters of focusing on "outcomes that concern attitudes, values, beliefs and emotions rather than academic achievement" (Manno 1994: 7). For the religious right OBE represents an attempt by the state to impose thinking that negates family values in favour of values that support "the need for students to be taught that alternative lifestyles, homosexuality and lesbianism were acceptable" (Boyd et al. 1996: 352).

Under the influence of Bloom's notion of mastery learning which stresses the employ of different pedagogical strategies to attain successful learning outcomes, Spady's view that learning ought to emphasise knowledge, skills and values and not just content in discreet boundaries, and the Coleman report's accent on the demonstration of learning competencies, OBE began to form the cornerstone of many countries' school curriculum policy (see Manno 1994 5-8). The departure point for learning and classroom pedagogy is to define clearly the outcomes students are expected to achieve at the end of a lesson or learning programme. Teachers must describe in detail the knowledge, skills and values that students have to develop in order to achieve these outcomes. Teachers have to consider alternative ways of helping students achieve the outcomes. They have to factor into their planning the different pace at which learning takes place for different students (Killan: 1996: 9). The preferred mode of assessment is criterion-based whereby assessment is individualised according to the varying pace of learning among the different students. OBE is undergirded by the idea that every student has the ability to learn and therefore could acquire the specified competencies or outcomes. Proponents of OBE view content as providing a support base for addressing and facilitating students' achievement of the outcomes, rather than as an end in itself (Killan 1996: 9)[112]. Nevertheless, OBE represents an attempt to achieve greater accountability by focusing on the end results of education (outputs), as well as the need to demonstrate the achievement of measurable competencies which is required to link education to economic considerations.

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[111]. For an account of the 'politics of OBE' in Pennsylvania (USA) between protagonists of OBE and the religious fundamentalist opposition to OBE see Boyd et al. (1996: 347-365).

Throughout the Curriculum 2005 documentation reference is made to the importance of the linkages between education and the need for greater economic efficiency. The idea that the school curriculum has to lay a strong foundation among citizens which would allow them to move flexibly between occupations and to work cooperatively features prominently (DoE 1996c). That human resource development appears prominently as a first principle relating to the curriculum design which underpinned Curriculum 2005 is explained thus:

> ...lifelong learning development, organised in South Africa in terms of the NQF, is

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[112]. The efficacy of OBE as curriculum approach stands in need of theoretical analysis by curriculum theorists. In line with the 'politics of curriculum' analytical approach I employ in this chapter I now go on to provide a discussion of the nature of OBE within the context of South African education policy development.

> incorporated in the human resources development strategy of the Government's Reconstruction and Development Programme (displaced by GEAR in 1996) and, as such, should be a major thrust of a new curriculum" (DoE 1997b: 8) (my insertion).

Another prominent principle which informed curriculum design has been the need to align the integration of education and training under the NQF with the development of a successful modern economy. In rejecting a rigid division between academic and applied knowledge an integrated education and training system is regarded as a "prerequisite for successful human resource development which will consequently be making a significant contribution to the reconstruction and development of our society" (DoE 1996c: 6). In terms of the need for the curriculum to be relevant the following statement made in 'Curriculum 2005: Lifelong Learning for the 21st Century' is instructive with regard to the link between education and the economy:

> Ever-increasing evidence suggests that economic growth in a competitive international economy depends fundamentally on a generally well-educated population equipped with the relevant competencies and skills required in the economy at any point in time but also with the capacity to continue learning and developing new skills, and acquiring new competencies (DoE 1997b: 8).

Thus, from the above excerpts, it is apparent that the discourse that emerges as the prominent one in Curriculum 2005, despite the presence of People's Education concepts (see para 4.5.5), is strongly characteristic of what has been labelled a HCT notion of education. HCT asserts that economic growth is dependent on the ability of a country's education system to produce the requisite human resources. The school curriculum has to target the production of a globally competitive and skilled workforce without which, it is said, a country would not be able to establish a strong economy. Thus, the curriculum's predominant focus would have to be on producing technologically literate workers. The curriculum should focus on the inculcation of broad-banded skills and technological literacy which would enable workers to operate with the necessary flexibility to enhance the quality and scope of production (see para 2.5.7).

The pivotal feature of HCT revolves around its view of the relationship between education and the economy. It propagates the view that education should play a leading role in creating a globally competitive economy. Curriculum 2005, in its eagerness to align the school curriculum with the building of a sound economy, also succumbs to this view which is untenable in at least two respects. Firstly, I agree with Jansen (1997a: 3-4) that changes in education and the curriculum would not lead to changes in the economic structure. Economic change mainly has to be sought in changes to a country's economic structure. Secondly, South Africa's macroeconomic strategy as embraced in GEAR provides an insupportable and unworkable framework to sustain the chosen educational and curriculum policy approach. I argued in Chapter Four that there is a dissonance between the NQF and South Africa's emerging political economy (see para 4.5.6). I maintained that the relationship between education and socioeconomic development resembles the flawed HCT position in terms of which socioeconomic development is contingent on the 'productive' role of education. As a result of the unsustainability and internal inconsistency of both the NQF and GEAR, the contingent relationship between the two will not be achieved (see. para 4.5.6). Thus, the government's vision of an integrated education and training system that would spearhead economic growth is untenable.

South Africa's chosen school curriculum policy exhibits an attempt to give credence to the HCT view of curriculum which links education to the world of work. OBE has been chosen by the NQF and SAQA to achieve equivalence between training and education which would enable individuals to move between these two sectors in pursuit of lifelong learning. In vocational training the classroom pedagogical relationship revolves around the acquisition of skills and competencies which most often involve a narrow instrumentalist pedagogy. The need in training for measurement of skill acquisition is facilitated though an outcomes-based curriculum and pedagogical approach. The NQF advanced a notion of pedagogy in which the concerns of training (which strives for measurability) trumped an educational pedagogy (which emphasises an open democratic approach).

Through OBE a technicist school curriculum approach has been spawned. The curriculum policy process was managed by the DoE to conform to a narrow OBE approach. The Technical Committee's rationalisation of the LACs' production of learning area outcomes and specific outcomes was motivated by the need to bring the curriculum firmly in line with the NQF (Botha, interview 20/8/1998 and Gallie 12/8/1998). The TC's intervention amounted to closing down of space for teacher innovation and creativity.

Their production of specific outcomes, range statements, performance indicators and learning programmes (DoE 1997c) resulted in a constricting curriculum approach. Teachers will have little space for manoeuvre in their attempt to achieve narrow outcomes. With outcomes it is implied that successful learning is determined by the achievement of predetermined outcomes. OBE expects all learners to behave similarly in attempting to achieve an outcome. Thus, it assumes that homogeneity in behaviour is a desirable outcome of learning. A democratic pedagogy that is constituted by openness, critical thinking, creativity and innovation is thus sidelined. Curriculum 2005, therefore, is based on a narrow OBE pedagogy which is contrary to the development of democratic classroom practices. I will now move on to consider the relationship between Curriculum 2005, the level of implementation and the 'politics of curriculum' that underpins the Ministry's curriculum choice.

5.6 Curriculum 2005, the level of practice and compensatory legitimation

In this section I tie the various strands I advanced in the previous sections together into providing a plausible response to the main issue around which this chapter revolves, which is to understand why the Education Ministry adopted a curriculum policy that would require radical curriculum and pedagogical change over a very short period despite popular curriculum wisdom that the implementation of curriculum change ought to take place over many years. I argue that the level of practice (schools, teachers and resources) is unable to provide a supportive environment for the implementation of the new curriculum. This is the result of the incongruence that exists between curriculum policy that has come to favour a radical overhaul in pedagogy, and the current policy trend in South Africa to cut spending on education. The inability to establish a sound learning culture in the majority of schools in South Africa will severely compromise the successful implementation of Curriculum 2005. In response to addressing the issue, then, of the rationale for radical curriculum change, despite the unpreparedness of the level of practice, I put forward below an argument based on the notion of compensatory legitimation in which I seek to understand the Education Ministry's actions as driven by the need to address its legitimacy deficit and thereby establish for itself much needed credibility which, until then, the Ministry had severely lacked.

5.6.1 Curriculum 2005 and the level of practice

Curriculum 2005 seeks to occasion a shift in classroom pedagogy and teacher identity that is radically different from the apartheid curriculum and pedagogical approach. The existing classroom pedagogy had been established over many decades under apartheid education and had come to constitute the way in which teachers work. Therefore, teachers will be expected to change their pedagogy dramatically in order to give impetus to the new curriculum. I argued in section 5.3 of this chapter that the official apartheid teacher education and curriculum philosophy was based on the narrow discourses of Christian National Education and Fundamental Pedagogics which shaped classroom pedagogy. The majority of teachers still teach in terms of a traditional content-based style. Curriculum 2005 demands that teachers assume a new identity to give effect to a learner-centred approach (DoE 1997b: 8) in which the teacher is expected to be a facilitator of learning rather than the sole repository of knowledge. Teachers are expected to individualise learning and assessment in order to allow each learner to acquire the learning outcomes (DoE 1996c: 4). Teachers who previously taught on the basis of subject disciplines would now be expected to develop competence to teach on the basis of learning areas. In order to teach the new integrated learning areas most teachers would have to engage in one or other academic area for which they had no academic or professional training. They are expected to provide activity-based learning, which would aim at integrating theory and practice and mental and manual learning (DoE 1996c: 22). Moreover, teachers are expected to internalise many complex concepts that constitute the new curriculum approach, some of which even curriculum bureaucrats have difficulty explaining (see Jansen 1997a:8).

Paterson and Fataar (1997: 3-10) argue that the pedagogical changes envisaged by the new curriculum would lead to nothing less that an identity crisis for teachers. Having acquired an identity under apartheid education which circumscribed the range of their pedagogical expression, teachers do not currently have the conceptual resources to shift to the new pedagogy. In this context teachers at best, would assume a defence reaction whereby they might change the form of their classroom pedagogy by, for example, doing group work and encouraging children to talk, but the substance of the old pedagogy would remain the same. That is, content-based teaching and norm referenced assessment would still be dominant.

One would have expected that the new curriculum would be accompanied by an intensive inservice training programme for teachers in order to prepare them for the new curriculum. While the DoE had committed itself to a national in service training programme for teachers, who will implement the curriculum in January 1998 (DoE 1997b: 41), the programme amounted to a few information workshops that focused on the new curriculum, its approach to outcomes, learning programmes and assessment (Kruss 1997: 11). Thus, the kind of ongoing rigorous preparation that teachers require in order to give them some chance of implementing the new curriculum is not forthcoming.

Implementation of Curriculum 2005 would also be compromised by the policy incongruence between curriculum policy and other school policy. The need to stabilise schools and establish a learning culture would have had to enjoy priority if Curriculum 2005 is to be implemented successfully. Apartheid education and the resistance to it in schools have bequeathed to South Africa a situation in which the moral authority of teachers and learning has been severely corroded (see Paterson and Fataar 1998). Black schooling is suffering from what is ubiquitously termed as a 'collapsed culture of learning and teaching' (Paterson and Fataar 1998 and Chisholm and Vally 1996: 4). A necessary, if not sufficient, priority for establishing a functional learning culture, is to address the physical deficits that most black schools inherited. It stands to reason that a new curriculum can only succeed if the necessary minimal physical environment exists. However, the Education Ministry has adopted a set of policies relating to schooling which compromises the generation of a learning culture. The policy of rationalising teachers through offering ill-conceived voluntary severance packages has led to many teachers leaving public schools (see Chapter Six)[113]. Many of these teachers had competencies in areas such as mathematics, science and language. Teacher rationalisation was based on the need to bring about equity in Teacher-Pupil Ratios across the public school sector. As a result, class sizes had increased considerably in many parts of the schooling system in order to conform to the new Teacher- Pupil Ratios of 35 to 1 and 40 to 1 in high schools and primary schools respectively. Moreover, schools' recurrent budgets have been cut which make it difficult for schools to pay for certain consumable items. The government's school funding policies entrenched a system of parental fees which in most black schools, because of the class base of parents, will not generate enough revenue to augment a school's operational budget deficit (see para 6.4.2). Many teachers have become demoralised by the new teaching context. This impacts negatively on teachers' capacity to be innovative in regard to the requirements of the new curriculum (see Paterson and Fataar 1997). In such a context, any new policy, especially those such as Curriculum 2005 which requires radical change, will be subjected to what policy sociologists calls 'policy recreation' (see para 2.6). This refers to the meaning given to policy in practice which is determined by the material conditions that obtain in a particular context. Despite the intentions of the policy makers, a particular interpretation would be given to policy at the level of practice which might be very different from the policy makers' intentions. Thus, Curriculum 2005 would be subjected to what Ball labels 'creative non-implementation' in which policy would be partially or wholly undermined in practice (1994: 20)[114].

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[113]. For views on the rationalisation and retrenchment of teachers see Fataar (1996), Vally and Spreen (1998), Motala (1997), Greenstein (1997) and Chapter Six of this thesis.

5.6.2 Curriculum 2005 and compensatory legitimation

In response to addressing the issue of the rationale for 'radical' curriculum change, despite the unpreparedness of the level of practice, I put forward an argument based on the notion of compensatory legitimation in which I seek to understand the Education Ministry's actions as driven by the need to address its legitimacy deficit and thereby establish for itself much needed credibility which, until then, the Ministry had severely lacked. Instead of delivering in education and all other social welfare sectors on the popular demands of an expectant electorate, the government has adopted a growth-first approach to social change and development. The narrowing of both the macroeconomic and educational agenda which I discussed at length in Chapter Four is the result of the government's commitment to a very constricting approach to fiscal discipline, driven by the desire to become a global economic player. The education budget, without any growth in real terms[115], had to be spread among more people who, having been excluded under apartheid, now have claim to equity in the provision of educational infrastructure. The Ministry chose to develop its public and educational policies with a view to effecting greater equity but within financial constraints. Financial cutbacks and financial and service re-prioritisation have occurred in the provision of health, social services, policing and education. According to Weiler (1990), when this happens a government loses its normative basis for governing because of its inability to provide social services which give it acceptability and legitimacy in the eyes of the electorate. The government's loss of normative authority is caused by its inability to satisfy the demands of an expanded polity. This aptly applies to South Africa after the 1994 election when the demands for social delivery increased manifold, while the ability of the government to satisfy the demands, given the circumscribed transitional context, was limited.

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[114]. In an article in the Cape Argus (28/5/1999) entitled 'Teacher problems have negative outcome on education' it is reported that a study of teachers and classroom practices shows that teachers do not know how to interpret Curriculum 2005 or how to ensure that students develop the conceptual frameworks of the new curriculum. The study concludes that reform initiatives must come to grips with the upgrading of teachers' conceptual knowledge and skills.

Thus, the government, facing a legitimacy crisis, began to look for other ways to establish its credibility and legitimacy. Education policy, especially in the area of curriculum has been deemed to be ideally suited to regain credibility for the government. This is not to suggest that the Ministry of Education has wilfully set about to use curriculum policy for political ends despite knowing that it does not stand a chance of succeeding in practice. While the primary purpose of curriculum policy is to direct change at the educational level, it also holds political value in its ability to signal particular political commitments. Curriculum policy is thus targeted for its strategic symbolic importance in that it embodies a statement of the kind of values that would dominate in society. Until the time the Minister of Education announced Curriculum 2005 as impending policy in March 1997, the Education Ministry has had to live with a negative image caused by it making contradictory policies, firefighting of crises, an inept Minister, endless Commissions of Inquiry into various aspects of educational reform, and unspectacular results in transforming education[116]. The Ministry was always very keen to impress upon the curriculum policy process the urgency of sticking to deadlines. It became an open secret among policy participants that the curriculum process was governed by the need to deliver a new curriculum for implementation in 1998 (Sieborger 1997 and Bam 11/8/1998). Curriculum 2005 was meant to signal the Education Ministry's seriousness and willingness to introduce significant policy change to achieve transformation in schooling (Sieborger 1997, Jansen 1997a and Gallie, interview 12/8/1998).

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[115]. Greenstein (1997: 2-6) convincingly shows that in real terms the budget has grown at an average per year of about 4% under the inflation rate which constitutes a sizeable reduction in the education budget. Over and above this, historically well-endowed provinces such as the Western Cape, Northern Cape and Gauteng would have to slash their budgets over the next three years to conform to equity criteria which will bring them in line with budgetary allocations to the lesser well-off provinces (Vally and Spreen 1998: 6-7).

[116]. See the useful 'Quarterly Review of Education' series published between 1994 and 1998 by the Education Policy Unit of the University of the Witwatersrand, for a listing of the

The use in Curriculum 2005 of the People's Education conceptual language in the official explanatory booklets obfuscated its underlying outcomes-based philosophy. It could be argued that the People's Education language was an attempt to endow the new curriculum with credibility and legitimacy. Thus, the radical rhetoric that accompanied Curriculum 2005's popular introduction in the media, despite the real possibility that it could flounder at the implementation level at schools, was an attempt to use curriculum policy for the purpose of symbolising the Education Ministry's commitment to the transformation of schooling. The concept 'defensive radicalism' used by Jansen (see section 5.2) aptly captures the contradictory usage of a radical curriculum change language employed to 'sell' the new curriculum. Curriculum 2005, in spite of the use of such language, is underpinned by a closed pedagogical approach which, as I showed in section 5.5, is dominated by the need to narrowly align education and the school curriculum to the dictates of a growth-led economic development path. However, in using the school curriculum as a means of compensating for the loss of political legitimacy as a result of its narrow education policy choices, the Education Ministry's legitimacy problems in curriculum policy will increase (Weiler 1990: 18). Curriculum policy will be dumped into crisis as a result of teachers' and schools' failure, unwillingness, or inability to implement the new curriculum policy in their curriculum and classroom practices.

Education Ministry's actions during this period. Of course, in supporting the view that the Ministry has been inept, I am not unsympathetic to the enormity and complexity of the task of educational reconstruction given the deep legacy of inequality that stifles attempts at change.

5.7 Conclusion

School curriculum policy in South Africa is an illustration of the complexity of education policy development in the post apartheid period. Curriculum 2005 embraces an instrumentalist OBE framework that strives to align the curriculum with economic development. An analysis of the policy process has shown how, through managed participation, the conceptual underpinnings of the new curriculum have been authorised. While the socioeconomic and transitional context has provided the structural delimitations of policy development, the specific policy dynamics within the curriculum process have given definitive meaning to school curriculum policy. This chapter has provided an analysis of the way in which the specific political and policy dynamics inherent in the policy processes have shaped the outcome of school curriculum policy.

In Chapter Six I analyse school access policy. This is a suitable policy area to understand a country's commitment to human rights. Whilst Chapter Four has given a generic macro education policy analysis, and Chapter Five an analysis of policy processes, Chapter Six will concentrate on the direct connection between policy and material context. I will assess whether, and how much school access policy provides the foundation for the development of a unified schooling system over the medium and long term.

Chapter 6: School access policy as an aspect of education policy development

6.1 Introduction

> If South Africa is to have an open, democratic and just society then schooling of quality is not a luxury but an absolute requirement. Without it, it will, of course, be possible to create democratic structures, but the essence of democracy, the full, informed participation of the people and the exercise of the democratic spirit in everyday affairs, will be missing. To that extent South Africa will be poorer in every way, and the new state will be democratic in name but not in substance (Hartshorne 1992: 38).

In an attempt to ascertain the specificity of the relationship between education, development and the extension of human rights to all South Africa's citizens, I focus in this chapter on the issue of access to schooling. If one of the defining features of any underdeveloped and undemocratic society is the withholding of primary education from its citizens, then a yardstick of a society's commitment to equity is its undertaking to provide all its children with quality primary education. A human rights perspective holds that the quality of citizenship in the modern world is contingent upon a society's ability to provide a sound primary education as a basis for human flourishing (Harthorne 1992: 39). Policy and practice with regard to the provision of equitable access to schooling in South Africa provide a suitable arena to assess the government's favoured approach to socioeconomic development generally and educational development specifically. This is congruent with Jonathan's view that education (in this case school access) presents a prime site to uncover a state's vision of broader reform as well as educational reform (see Jonathan 1997: 15-32).

One of the biggest tragedies bequeathed by the legacy of apartheid was the inequitable provision of schooling to blacks in South Africa. In quantitative terms there is a sizeable population of children of school age not in school, while qualitatively the schooling system fails to provide any meaningful educational benefit to the majority of students. The ubiquitous phenomenon of an absence of a culture of learning in schools bears testimony to the poor quality of existing schooling. The South African schooling system is characterised by unevenness and inequality. There are vast differences between historically privileged former white schools and the majority of deprived black schools. Notwithstanding variations in the general pattern, one can say that South Africa has a deeply entrenched dual schooling system which has been constituted along racial lines, but is now increasingly also taking shape along class lines (Tikly 1997: 177-188). The project to build an equitable schooling system presents itself as an obvious target for high prioritisation on the South African government's development agenda.

The importance of the provision of equitable access is acknowledged in the White Paper on Education and Training (DoE 1995a). It allotted an entire chapter to the issue in which a broad approach to school access is suggested. As a product of the early post election period in which RDP thinking held sway, the WPET attempts to hold equality and development in tension (see para 4.3). The WPET argues for a phased approach to the implementation of equitable access to schooling. Free and compulsory schooling of acceptable quality would be provided in relation to the country's capacity to grow economically[117]. In this chapter I will use the WPET conceptualisation of 'equitable access' as an analytical benchmark in order to assess a range of subsequent policy and practice with regard to school access. A key factor in understanding the unfolding of access policy is the shifting macro economic and education policy trajectory (see Chapter Four).

The main aim of this chapter is to understand to what extent school access during 1994 and mid-1997 conformed to the government's self-defined priority of phasing in a unified and equitable schooling system in South Africa. Unlike curriculum policy discussed in the previous chapter which has a specifically designated policy area for its operationalisation (i.e. Curriculum 2005), school access policy can only be assessed by means of looking at related policy issues. There is no specifically demarcated policy area to assess school access policy. I will therefore isolate some policy issues that are tangential to schooling access in order to understand the government's enactment of its commitment to equitable access. The chapter is argumentative rather than strictly empirical. I attempt to build an argument by drawing on a range of schooling policy and practice related to the provision of a quality schooling system for all. The central organising question is: how did access policy and practice during the period under discussion give expression to the stated policy commitment (see WPET 1995: 73-78) of providing a platform for the operationalisation of equitable access to schooling in South Africa?

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[117]. I argued in Chapter Four (para 4.5.2) that the WPET has an ambivalent position on the relationship between equity and quality. In the first twenty pages an undifferentiated commitment to both equity and quality is displayed. This, I argued, could lead to an ambivalent development approach. But, in the later section on access to schooling, the WPET has a more nuanced understanding of the relationship.

I start by developing an analytical framework in terms of which I am able to assess the government's commitment to equitable access. I outline Fuller's (1991) theoretical work on school access, especially his key analytical concepts namely 'fragile state' and 'bureaucratic tightening'. I proceed to locate school access within its policy context. I provide a cursory picture of the nature and extent of the existing inequitable access to schooling within historical and political economy context. Following on this is a discussion of the conceptual development of access. I discuss school access policy in the post election period with a specific focus on the WPET. I also locate access within the narrowing context of macro economic and educational reform between mid-1994 and mid-1997. I then go on to analyse the policy and practice that have had a shaping effect on school access. I chose to analyse the following areas: school funding policy, teacher rationalisation policy and the RDP's Culture of Learning Programme. I argue that an analysis of these three issues would reveal the government's policy trajectory with regard to school access. I show that in its choice of a particular access policy path, the government, in conformity with its narrow macro education policy, gave limited effect to school access. This represents a decisive down scaling in the government's commitment to equitable access to schooling. Arguably, schooling would become more divisive and inequitable.

6.2 Theorising school access

Equitable access to schooling in the developing world has been subjected to much theoretical development over the last four decades. The three main ways in which school access have been theorised are: the technical-functional, class-conflict and world institution model. The technical-functionalists hold that school access develops in relation to the economic modernisation of society. The class-conflict model views mass schooling as a very powerful mechanism through which dominant groups attempt to reproduce economic, social and educational structures in their interest. World institution theorists argue against viewing schooling access in functional terms as either facilitating entry into modern society or reproducing social and educational inequality (see Fuller 1991). They posit that "mass schooling represents a higher level of collective authority - really, a worldwide social movement that is linked to the ideals of western progress than to any specific economic or political organisation" (Fuller and Rubinson 1992: 11). Elites and the state appropriate the symbolism inherent in mass schooling to signal their commitment to progress and modernity.

Using world institution theory as a starting point, Fuller (1991) develops a useful framework to analyse school access. The 'fragile state' is at the centre of his framework. This concept refers to states in the developing world that are faced with enormous challenges to deliver on popular expectations for transformation and modern progress. The fragile state is, however, severely constrained because it lacks sufficient material resources, organisational infrastructure and technical know-how to deliver concrete improvements in economic and social well-being (Fuller 1991: xvii). In the context of mediating an array of interests within a limited resource base, Fuller contends that the "institutions of mass schooling hold enormous political utility" (Fuller 1991: xvii). He argues that over decades schooling has become the most powerful and unquestioned device for entry into the modern polity. People value the school as an effective medicine to cure social ills and economic backwardness. Mass schooling is a key strategy for denoting modern institutional change, the coming of western ideals and the arrival of mass opportunity (Fuller 1991: xviii). Building more schools symbolises the state's commitment to modern change and social improvement. Rapid construction of schools is meant to serve a range of expectations including: nation-building, improving quality of life, bringing citizens into the wage economy and boosting economic productivity and growth. The status of schooling as a signifier of modern progress and equity is unparalleled despite its failure often to satisfy these expectations.

The fragile state is caught in a dilemma of having on the one hand to expand schooling and to provide resources to service an expanded schooling system in cases where countries have achieved widespread schooling coverage, while on the other hand having to deepen the effects of schooling in a financially austere environment. A balance has to be found between the contradictory demands of providing access versus improving school quality (Fuller 1991: 5). The issue thus revolves around how to give effect to both in order to derive maximum symbolic value for the state. States make strategic choices, given limited financial resources, about which specific aspects of schooling they wish to support and strengthen. These choices are informed by the state's perceptions of the specific policy area that holds most symbolic value and signalling potential.

The twin agendas of expanding and deepening mass schooling present the fragile, resource-poor state with a contradictory tension (Fuller 1991: 7). Popular association of mass schooling with mass opportunity and modern change can only be sustained if minimal levels of school quality are achieved. Often, however, money for educational quality is undercut in an attempt by the state to spread its resources to cater for the increased expansion of schooling. Where citizens realise that schooling is only used as a signalling device, they tend to withdraw from schooling. This causes the state's legitimacy to recede. In order to address this political dilemma states usually employ what Fuller terms 'bureaucratic tightening' which refers to the establishment of strong forms of bureaucratic procedures and structures that would attempt to vigorously pursue improvement in schooling quality.

These states use highly centralised agencies to "catch up, to hurry up development" (1991: 20). Rationalised, nationwide organisation of firms and state bureaucracies are set up to achieve school development targets. These structures have to penetrate very different social formations which make the outcomes of the projects uneven and contradictory. In this context bureaucratisation is reinforced as the principal means through which the state attempts to signal its commitment to school expansion and quality schooling. The fragile state is more motivated by the signalling potential of its school development efforts than by whether actual improvement occurs in the quality of schooling.

In sum, Fuller's theoretical framework, while not without problems (it plays down the role of class), allows one to analyse the state's policy and practice apropos the policy commitment to equitable access to schooling. It supplies a useful theoretical framework to interpret the state's functioning in addressing the contradictory demands of expanded mass schooling and improving educational quality within a financially limiting macroeconomic environment. Fuller's concept of 'bureaucratic tightening' provides theoretical guidance to understand the South African government's RDP school development programme as a way of signalling, rather than effecting, equitable access to schooling.

6.3 School access in context

In this section I locate school access within socio-historical context. This will allow for a more informed analysis of access in the post apartheid period. In sketching the legacy which schooling access policy has to address, I attempt to show how the policy terrain has been constructed and come to be understood. This has played a fundamental role in informing the way in which policy makers has chosen to address access. I will show that a central feature of this policy discourse is the use of the concept 'culture of learning and teaching' which has attained widespread popular appeal. School access policy in the period that I am reviewing has come to be defined by this concept. Drawing on Fuller (1991), I contend that the 'culture of learning and teaching' has become a defining feature of access policy as a result of its inherent symbolic and signalling value.

6.3.1 School access in historical context

The existing pattern of provision of schooling in South Africa is the outcome of a history of colonialism, segregation and apartheid. The brief description of apartheid education that follows here should be read in conjunction with Chapter Three which gives a historical contextualisation of education. The apartheid state's provision of mass schooling for Africans under Bantu Education went through a number of significant shifts between the 1950s and 1990. These shifts impacted on the nature and extent of school expansion. Unterhalter (1991) posits that Bantu Education was driven by two factors, firstly, its authoritarian, unequal and repressive nature, and secondly, a fluid discourse of reformism. The first two decades of Bantu Education, the 1950s and 1960s, saw an incremental increase in African enrolments in tandem with the separate development notion of grand apartheid. The 1970s and 1980s, however, saw massive increases in African enrolments as a response to the need to achieve economic growth and political stability. State reform generally and also in education was aimed at the modernisation of apartheid in order to mediate new economic realities and political demands for the scrapping of apartheid (see para 3.3 and 3.4).

Tables 1 and 2 depict the growth in African schooling and funding from the 1950s to the late 1980s. After initial tardiness, black schooling grew exponentially during the late 1970s and 1980s.

Table 1: African pupils enrolled in Bantu Education schools 1953-1988 (thousand pupils)

	Primary	Secondary	Total
1953	852,0	30,7	882,7
1955	970,2	35,0	1 005,2
1960	1 452,3	47,6	1 499,9
1965	1 833,0	65,6	1 898,6
1970	2 615,4	122,5	2 737,9
1975	3 378,9	318,5	3 697,4
1980	4 063,9	774,0	4 837,9
1985	4 820,1	1 192,9	6 012,9
1988	5 365,6	1 662,0	7 027,6

(Source: Unterhalter 1991:37)

Table 2: Spending on African education 1953-88 (millions of rands)

	Total expenditure	**Expenditure at constant 1975 value of the Rand**
1953	16,0	32,8
1955	15,8	36,0
1960	19,5	38,8
1965	24,9	46,6
1970	66,3	86,2
1975	160,2	160,2
1980	553,0	302,8
1985	1 816,0	533,6
1988	4 096,0	not available

(Source: Unterhalter, 1991: 48)

There has been a debate in policy circles about the number of children of school age currently out of school in South Africa. Projection about this number has a direct impact on school access policy. For example, if it is accepted that there is a sizeable number of children not in school then policy would have to target the physical (quantitative) expansion of the schooling system. In a context of limited resources this would divert money from addressing the enhancement of quality. The imprecise census statistics available on population size has made it difficult to make conclusive pronouncements on the issue[118]. Policy analysts such as Hartshorne (1992a and 1992b) and Fataar (1997b), drawing on statistical projections, put the figure at between 1,5 and 2 million children out of school children between the ages of seven and fifteen years old. Using this figure as a basis, they advocated the massive quantitative expansion of schooling.

However, within policy circles, especially in influential education statistical units such as the Research Institute for Education Planning (RIEP) at the University of the Free State and Edusource[119], the accepted position is that school coverage is not as problematic as initially thought. Crouch and Mabogoane suggest, based on the statistical information available in 1997, that there are only between 250 000 and 300 000 children out of school and that comparatively this is acceptable, even favourable, for a developing country like South Africa (1997:7). South Africa currently has 12 000 183 pupils in school. This number is projected to grow to 15 846 355 pupils by 2008 at an annual growth rate of 2,43 percent for primary schools and 3,9 percent for secondary school (RIEP 1998: 15). Crouch and Mabogoane state that " ... given the historical discourse, the surprising thing about South Africa is the nearly universal coverage in most grades, and the large number of years children attend school" (1997: 5). Left leaning education policy academics, such as Chisholm and Motala from the Education Policy Unit at the University of the Witwatersrand who have done work on school access, concur with Edusource and the RIEP that the lack of school coverage is not as widespread as initially accepted (Motala 1997 and Chisholm 1998)[120]. Rather, problems with regard to school access is projected to be more about the quality of schooling. However, if the schooling system is expected to grow as rapidly as suggested by the above projections, education resources will be spread much thinner in order to incorporate increasing numbers. Following Fuller (1991: 5), this would have the effect of decreasing the amount of money available to deepen the effects of schooling (i.e. quality).

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[118]. The 1996 census statistics were finally published in October 1998. We should have a more accurate baseline of the number of children of school age not in school when the census statistics are worked into the current statistics on education.

[119]. The RIEP and Edusource have been appointed as the official educational statistics providers of the National Department of Education.

[120]. I have taken the current projection by Edusource and the RIEP of between 250 000 and 300 000 children of school age out of school as authoritative.

The rapid quantitative expansion of schooling that started in the mid-1970s, is by no means an indication of the outcomes of that schooling. Expanded provision of schooling did not translate into quality schooling. In fact, a study focusing on literacy suggests that despite the expansion depicted in the tables above, little improvement of the quality of schooling had occurred (see Fuller, Pillay and Sirur 1995). As an indication of the lack of quality schooling, Unterhalter shows that the percentage of Africans who passed the matriculation examination (high school exit exam) steadily declined from 55 percent in 1975 to 24 percent in 1989 (1991: 46).

Educational planning for the creation of a single education system has to contend with a fundamentally distorted legacy. The new dispensation inherited a highly differentiated education system. Nineteen subsystems catered for the various ethnic and race groups. Great disparities existed amongst these subsystems. Schooling for Whites and Indians was generally well-endowed. Coloured schooling was in a parlous state while African schooling was by far worst off (see Hofmeyr and Buckland 1992: 15-59). In the various schooling subsystems there thus still exists a racial hierarchy of unequal provision to which *in-school* children are subjected. Most of the *out-of-school* children are African. According to Hofmeyr and Buckland (1992:15-59) regional inequalities are very striking. Seventy percent of all African children are schooled in the former Homelands[121] and rural areas. This forms the most disadvantaged schooling sector. Twenty four percent of African schooling takes place in massively under-resourced farm schools. Gordon convincingly argues that current policy, suffused with an urban bias, will widen, rather than decrease inequalities in rural schools (Gordon 1996: 3). Regional disparities are thus a very important dimension of expanding equitable access to schooling. Urban provinces such as the Western Cape and Gauteng are generally more well endowed than predominantly rural provinces such as Kwazulu Natal, the Northern and North-West Provinces and the Eastern Cape (see Strauss, Van Der Linde, Plekker and Strauss 1994, 1995, 1996 and 1997).

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[121]. The Homelands were composed of what was referred to as the Independent TBVC States (consisting of Transkei, Boputhatswana, Venda and Ciskei) and six Self-Governing Territories.

6.3.2 A picture of inequitable access: inputs, outputs and throughputs

The poor quality of formal schooling offered to blacks in South Africa is stark, whether seen from the vantage point of *inputs* such as teachers, textbooks, physical facilities, or *outputs* such as promotion rates and matric results, or *throughputs* such as what goes on in the school (i.e. quality).

With regard to *inputs*, very important information on the nature of schooling has been accumulated in the School Register of Needs Survey commissioned by the National DoE. The Survey was decreed by the WPET (DoE 1995a: 75) in order to locate and catalogue the physical resources and conditions of schools. The three institutions that did the Survey on behalf of the DoE were: the Human Science Research Council, the Research Institute for Educational Planning and Edusource. A geographical information system was utilised which spatially mapped the resource distribution. It is expected that the Survey would have an important role in providing a baseline for monitoring the equity of resource distribution and the quality of physical inputs into schools (Riddell 1997: 6).

In order to illustrate the extent of inequities in the South African schooling system I provide below a few results from the summary finding report of the School Register of Needs Survey (DoE 1997d).

With regard to electricity availability, power supply is highest in schools in Gauteng, Western Cape and Northern Cape, while the Eastern Cape has the lowest rate with 4 505 out of 6 545 schools without power.

School buildings in the Western Cape and Gauteng are in the best state of repair. The provinces with the most dilapidated buildings are the Eastern Cape, Kwazulu-Natal and the Northern Province.

The following are the percentages of schools with telephones in some of the provinces: Western Cape - 88%, Gauteng - 85%, Northern Cape - 77%, Kwazulu-Natal 34%, Free State - 25% and the Eastern Cape - 19%.

For toilet shortages in certain provinces the following figures are given: Western Cape -

15 139, Kwazulu Natal - 66 921 and the Eastern Cape - 46 785.

The Pupil-Teacher Ratio in the Western Cape, Northern Cape and Gauteng is on average 28 to 1, while in the Eastern Cape it is 51 to1, in Kwazulu-Natal it is 40 to 1, in Mpumalanga it is 41 to 1, and in the Northern Province it is 44 to 1.

Percentages for schools that have media centres are: Western Cape - 60%, Gauteng - 52%, Free State - 50%, Northern Cape - 43%, North West - 26%, Kwazulu-Natal - 21%, Mpumalanga - 18%, Eastern Cape - 15%, and Northern Province - 5%.

The pupil to laboratories ratios in some provinces are: 1 laboratory to 223 pupils in the Western Cape, 1 to 334 in Gauteng, 1 to 911 in the Eastern Cape, and a staggering 1 to 2291 in the Northern Province (see DoE 1997d: 4-12).

With regard to the key input of teachers and their qualifications, Hofmeyr and Hall (1995: 33-36) state in the National Teacher Education Audit that two thirds of all African teachers are under or unqualified, and that those who are qualified have received very low quality teacher training and development. The number of underqualified teachers stands at 122 459, 64% of whom are African (Motala 1997b: 2). By 1994 the average annual teacher's salary per race group was as follows: African - R30 000, Coloured - R40 000, Indian teachers - R39 000, and White - R49 000. As a crude measure of the quality of teachers[122], it can be deduced from these figures that the best teachers are to be found in former White schools while the lowest quality teachers are in African schools. What is surprising is the level of efficiency attained by Indian teachers. While the Indian schooling system has had a high throughput and output rate, it has accomplished this on a comparatively low teacher cost[123].

The statistics above show that there is gross physical resource deprivation across the entire schooling system. The task of providing equitable access to schooling is enormous. The complexity of schooling provision, the result of a pernicious and sad historical legacy, should not be underestimated. Also apparent, however, are the regional and racial disparities in schooling provision. The more urban provinces, such as Gauteng and the Western Cape, with the least African and most White pupils enrolled, are comparatively well-endowed. The former White and Indian sectors appear to be qualitatively superior to the former Coloured and Black schools. The very complex patterns of racial integration that have manifested in the last decade, especially accelerating in the last five years are taking place on the basis of class financial affordability. However, for the majority school participation is still determined on the basis of race. Children, from specific race groups, by and large, still attend schools that were designated for those groups under apartheid. It is clear from the School Register of Needs Survey that policies of equity and redress in schooling have to target those schools that have been most deprived under apartheid, while it will at the same time be faced with pressure not to erode the quality of well-functioning schools. This would necessitate from the government a very complex balancing act in mediating the many contradictory demands that impact on school policy.

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[122]. Not all qualified teachers turn out to be good teachers, while not all under-qualified teachers are bad teachers.

[123]. Attempting to understand the reasons for the efficacy of Indian teachers would make for an interesting research study.

As far as *outputs* are concerned, three issues are worth highlighting. Firstly, the matriculation pass rates average per race group from 1988 to 1993 are: Whites - 96%, Indians - 93%, Coloureds - 70%, and Africans - 39% (Strauss et al. 1994:12-13). The most popular subjects taken by Whites and Indians are Mathematics, Accounting, Physical Science and Biology, while Blacks and Coloureds prefer rote-learning subjects such as History, Geography, Business Economics and Biology (Strauss et al. 1993:12). Thus, not only have the pass rates been skewed racially, the tertiary educational prospects and occupational possibilities of Coloureds and Africans have been severely circumscribed as a result of their being limited to low-status subjects.

Secondly, Crouch and Mabogoane (1997: 4-6) show that there is very high coverage in grades one to five while enrolment reduces drastically from grade six. They conclude from their statistical analysis of the latest available data that there is considerable over-enrolment as well as a high failure rate in grade one. This they conclusively show is the result of massive underage enrolment by working parents who send their children to school before they reach the age of six. This over-coverage has led to a high level of inefficiency in the schooling system. It was in reaction to these findings that the National

DoE announced a new age and admissions policy in October 1998 which stipulates that a child can only enter grade one in the year in which she or he turns seven (Cape Times 20/10/1998). Through this measure the Department envisages a saving of R1,4 billion per year. Thirdly, pupils who stay in the system remain on average 12,5 years in school, but due to a high failure rate do not go through the system. From this it can be deduced that on average the in-school level of quality is appallingly low. Crouch[124] and Mobogoane conclude that getting learners into the system, and keeping them there, is not the problem; the problem is with the quality of learning they get (1997:5). The view that has gained currency in policy circles with regard to school access policy is captured in the following quotation:

> The task that now appears is a less dramatic but more difficult one: that of managing the flow of learners through the system, rather than the simpler (managerially) but depressing (financially) task of throwing resources (building schools, hiring educators) at a major under-enrolment problem ... The analysis of indicators reveals a deep quality problem, as opposed to a raw access problem. The real tragedy is not one of out-of school youth, but the fact that youth are in school, investing more than 12 years of their lives, to achieve only a 1:4 or 1:3 chance of entering adulthood with a matric pass (Crouch and Mabogoane 1995:25).

Turning to *throughputs*, i.e. the vexing question of educational quality within the school and classroom, it is clear from the picture of schooling provided above that the majority of black schools suffer from a very low quality. This is attributed to the apartheid state's failure to pay sufficient attention to in-school physical resourcing, teacher development and pedagogical relationships. In targeting the rapid quantitative expansion of black schooling, the state neglected the quality dimensions[125]. During the 1970s and 1980s the issue of a lack of quality schooling as a result of resource deprivation, among others, became a rallying point around which high school pupils mobilised (see para 3.4). A resistance culture took root in black schools across the country. The ubiquitous 'collapse of a culture of learning' gained popular currency in this period. Initially associated with romantic notions of insurrection and revolution, pupil militancy, as a reaction against what pupils viewed as the narrow ideological objectives inherent in apartheid education, played a decisive role in causing the collapse of authority and the already tenuous semblances of systematic learning in black schools. The collapse of a culture of learning refers to the situation where a systematic, routinised and orderly learning and teaching environment in schools does not obtain (Paterson and Fataar 1998). As I show later-on, it is a specific interpretation of 'culture of learning' which informed school access policy and practice.

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[124] Crouch, a US academic, has become the National DOE's de facto main advisor on funding and statistical analyses. His statistical projections have become very authoritative.

[125] School quality is under-theorised in South Africa. Tentative forays into quality have been made by Kissack and Meyer (1996), Jansen (1995c) and Motala (1995, 1997a, 1997b). Kissack and Meyer contend that the concept of quality operating within policy circles is diffuse and overshadowed by concerns over formal access (1996:234-235). Jansen (1995c: 181-200) provides a very useful literature review, synthesis and critique of school effectiveness research. Motala argues that there is a need for consensus on quality, to accept it has a normative and descriptive agenda, and to extend the notion of quality as adding value, as empowerment, and as epistemological access (Motala 1997a: 15).

I have attempted in this section to locate school access policy in historical context in order to show the complexities involved in extending equitable access to schooling for all in South Africa. I also showed how certain conceptualisations of the issue evolved. I now move on to an analysis of school access policy and practice between 1994 and 1997.

6.4 School access policy in the post apartheid period

The second half of this chapter provides an analysis of school access policy in South Africa in the post apartheid period until mid-1997. In locating access within the historical context of the unequal provision of schooling, specifically with regard to quality, I attempt to understand how the government has begun to give effect to redressing the situation. Those areas in need of equity are schooling in African, Coloured and Indian urban and peri-urban townships and rural areas. I firstly focus on the conceptual evolution of 'school access' and specifically highlight the meaning the WPET (DoE 1995a) gives to the concept. A central defining feature that impacted on the conceptualisation of access is the narrowing political economy context of the period under review (see Chapter Four). I use the WPET's view on 'equitable access' as an analytical benchmark against which I measure the extent to which the government's policy and practice have given effect to redress and equity in schooling. Secondly, my analysis turns to policy on school funding in order to assess the government's commitment to financial inputs in attempting to give effect to equitable access. While financial inputs are not a sufficient condition to achieve a reconstructed schooling system, it provides an emphatic indication of the government's commitment to redistributing resources to areas of greatest need. Thirdly, I focus on the much vaunted teacher rationalisation and redeployment plan, in order to highlight the meaning given by the government to 'equity' in schooling. Instead of achieving equity, the plan led to the departure of many of the most valued teachers from the system which, I believe, undermined attempts to achieve equity in schooling. Finally, I assess the government's RDP Culture of Learning Project which represents an attempt to set up flexible bureaucratic processes in order to improve learning conditions at impoverished schools. I also show how the government utilises the symbolism inherent in the 'culture of learning' as a means of signalling, rather than effecting change within schools.

6.4.1 Conceptual evolution of 'access to schooling'

The WPET prioritises access to schooling for all children as one of two specific policy initiatives central in developing a new school system[126]. The antecedents of the WPET's view on access to schooling can be traced to a very strong human rights current which emanated from the protest politics of the pre-1990 era. The WPET's position on schooling access represents an attempt to balance the competing demands of equality and economic growth.

The global project which endeavoured to provide quality schooling to all the world's children was firmly entrenched as a major international concern at the end of the 1940s. The Universal Declaration of Human Rights (1948) and the Declaration of the Rights of the Child (1959) call for free and compulsory education of a minimally accepted level of quality for all. Expanded access to schooling grew rapidly in the developing countries during the 1950s and 1960s (see para 2.3.2). However, as a result of rapid population growth and stagnant economies, the growth of schooling slowed down, while school quality began to erode. In fact Graham-Brown notes that "the prospects for achieving primary schooling for all by the year 2000 ... seem remote" (Graham Brown 1991:2). In the context of a receding commitment to primary schooling, the Jomtien conference on school access set in train an educational development agenda that had the global role players and southern countries recommit themselves to achieving universal primary education (see World Declaration on Education for All, Jomtien, Thailand 1990). South Africa participated in the mid-decade review of the Jomtien Declaration held in Jordan which assessed the progress made since the conference in 1990 (Obura 1996: 14). Its participation in the review signalled a policy commitment to achieving equitable access to primary schooling. South Africa formed part of the Southern African regional response to schooling access (Obura 1996:14-15).

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[126]. The other priority area targeted by the WPET is the organisation, governance and funding of schools (see DOE 1995a: 67-72).

The demand in South Africa for the provision of free and compulsory schooling was already prominent in the Freedom Charter adopted by the Congress Alliance in 1955. The Freedom Charter states that "the doors of learning and culture shall be opened! Education shall be free, compulsory, universal and equal for all children" (quoted in Wolpe 1991: 6-7). This demand found resonance in the mass student and worker uprisings of the 1980s. In the context of the emergence of the People's Education discourse propagated by the liberation forces which gained currency as the antithesis of apartheid education (see para 3.4), the NECC pronounced in a declaration adopted in 1989, that "education is a basic human right, schooling should be free and compulsory for all children" (NECC 1989). The struggle for liberation from apartheid thus placed the demand for the provision of quality primary schooling firmly on the post apartheid development agenda. The hegemonic conceptualisation in the protest phase was largely an undifferentiated one, which failed to distinguish between competing conceptual positions embedded in schooling access. For example, it ignored the tension between providing equitable access and considerations of financial affordability which would have an impact on the policy choices to be made in giving effect to school access.

The National Education Policy Investigation (NEPI) produced by left education academics under the aegis of the NECC, is the first attempt by the liberation movement to develop policy by drawing on the abstract People's Education philosophy. While its conceptualisation of schooling access is driven by a strong notion of equity and redress, it took into consideration the impact of the limitations placed on it by the need for economic growth and development. The NEPI expresses its commitment to the provision of a quality basic education thus:

> Educational entitlements in South Africa are more unequal in respect of basic primary education than any other level, and this underpins inequalities of achievement elsewhere in the education system. Revitalization of basic schooling is the central core of educational development (NECC 1993: 50).

In this light, NEPI considers the upgrading of depressed schools' conditions as a high priority. It regards the qualitative renewal of primary schooling as the key to reducing wastage, over-enrolment and repetition. It favours a strong interventionist state to achieve a qualitatively enhanced schooling system. It argues that leaving schooling provision up to local initiative and community participation would not provide a galvanising platform to achieve rapid results. A wide-ranging catalogue of state-driven projects is proposed to upgrade basic education. This includes: physical improvement of buildings and maintenance of classrooms, curriculum change, provision of books, teaching material, laboratories, preschool facilities, school health services and special and adult education needs (NECC 1993: 52). This list clearly illustrates an equity thrust in the NEPI position. Because of apprehension over bureaucratic inertia, the NEPI recommends that the challenge of the renewal of schooling "requires a dynamic, flexible, innovative, 'development' approach, backed up by public funds but operating outside the bounds of bureaucratic procedure" (NECC 1993: 53).

On the financing of basic schooling, the NEPI supports financial reprioritisation from white to black schools, and more evolutionary approaches (NECC 1993: 55). Noting that the government would be faced with competing demands from other areas in need of reconstruction, it posits that increases on current educational spending would be unlikely. The NEPI makes a number of innovative suggestions to finance schooling. It argues that temporary increases in domestic state spending on schooling might be justified, as well as international aid. Improving the efficiency of the system is also a strong option with the goal of improved schooling having to be "to seek system change that reduces, rather than increases, the recurrent cost of delivering good quality education in schools" (NECC 1993: 56). Because of the comparatively high cost of white and urban education, it suggests that state spending for urban white schools be cut. Desegregation of schools, subsidized school transport, and doubling enrolment in under-enrolled schools through increased Pupil-Teacher Ratios all feature prominently in an attempt to shift money to the improvement of quality in deprived schools. The NEPI commented that these are "evolutionary approaches to financial redistribution which would reduce state subsidization of privileged schooling and increase resources available to townships and rural schools" (NECC 1993: 57). While the NEPI's understanding is imbued with a strong redistributional thrust, its policy prescriptions are subjected to a limiting financial environment. The WPET's immediate antecedent document, the ANC's Policy

Framework for Education and Training (APET) endorses the NEPI position on access to schooling (see ANCb 1994: 109-112).

The position developed in the WPET on access to schooling has to be understood in the light of the government's overall socioeconomic development plan as contained in the RDP White Paper (RDPWP 1994). I discussed at length the discursive underpinnings of the RDP in Chapter Four (see para 4.4.2). I argued that it embodies an uneasy equilibrium between equality and growth. The GEAR policy, which displaced the RDP (see para 4.4.3) resolved this instability by positioning socioeconomic policy firmly within a growth-led agenda. Concomitant to the RDP's balancing act between equality and growth, the WPET's position on schooling access, in being committed to the phased provision of 'equitable access', attempts to provide a principled, yet realistic, policy position[127]. However, ultimately, school access in the WPET also succumbs to an uneasy equilibrium between equity and growth, specifically within the context of a growth-led development discourse adopted in 1996 by the acceptance of GEAR as macroeconomic framework in 1996 (see para 4.4.3).

The WPET has a wide-ranging chapter on access entitled 'Meeting the Commitment to Free and Compulsory General Education'. It consists of a set of broad policy principles which outline the scope and approach of extending school access, and a set of operational principles which provide guidance on the implementation of access policy. The WPET is located within the ambit of the Interim and Final Constitutions accepted in 1993 and 1996 respectively. The Interim Constitution underscores a human rights position, stating in its Chapter One, clause 32, that "every person shall have the right to basic education" (RSA 1993: 8). The WPET elaborates on this clause thus:

> The government is committed to the goal of providing access to general education for all children from a reception year up to Grade 9 (Standard 7), fully funded by the state at an acceptable level of quality, and to achieve this goal in the shortest possible time (DoE 1995a:73).

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[127]. The WPET's position on school access, I believe, is out of step with the overall tendency of the WPET to veer in the direction of favouring fiscal discipline and growth (though not conclusively so) (see para 4.5.1). Contradictions like these might be the result of different authors penning different sections of the WPET, which could have given rise to the internal inconsistencies in the document.

On the question of fundamental rights to and within education and training the WPET states that:

> Basic education is thus a legal entitlement to which every person has a legal claim. For children, the right would be satisfied by the availability of schooling facilities sufficient to enable every child to begin and complete a basic education of acceptable quality. ... Attaining this level of availability of opportunity for basic education will be an immense achievement in the reconstruction and development of the country (DoE 1995a: 40).

The WPET establishes a pragmatic policy approach to the realisation of ideals expressed in the above statements. Informed by an imprecise statistical picture that emphasised a high school coverage deficit, the WPET committed itself to the physical expansion of the schooling system in order to incorporate the projected large amount of out-of-school children. At the time of writing of the WPET the accepted figure on the number of children of school age not in school was estimated to be about 1,5 million children. Thus, in response to eradicating the backlog, the WPET made a commitment to building more schools and classrooms and training of more teachers (DoE 1995a:73). While this issue does not recede in importance, the currently accepted view that school coverage is relatively universal in the first five grades, and drops of from grade six, suggests that physical school expansion is not the most important priority in school access policy. Rather, statistical analyses to which I referred earlier (see 6.3.1), show that the pressing policy problem is the low level of the quality of schooling.

Achieving quality schooling is viewed in the WPET as a high priority. It supports the view that basic education provision should go beyond increasing the number of children in school, to improving the nature and quality of schooling on offer. Improving quality would mean having to ensure that the "material and human resources be made available to schools from state funds sufficient to allow an acceptable quality of learning to proceed" (DoE 1995a: 74). To achieve this, the upgrading of teachers, the supply of textbooks and instructional materials, and the provision of physical facilities such as basic furniture, electricity, water supply, libraries, laboratories and recreational facilities are highlighted as crucial inputs which would secure a learning environment that would enhance the quality of schooling. In the WPET it is suggested that a national school campaign to facilitate school development be launched that would be linked to the RDP Presidential Lead Programme on the Culture of Learning. I evaluate in the last section of this chapter the government's initiatives in this regard.

Educational financing policies, according to the WPET, must direct the limited public resources (given the emphasis on the government's emphasis on fiscal discipline in order to reduce the budget deficit) to attaining a universal and equal schooling system. Affirmative action is adopted as a guiding principle to redress inequalities in provision. This means that funding would be prioritised for those sectors that have been discriminated against in the past. In this regard, the WPET states that "to achieve equity, it may be necessary to pursue policies that treat different groups of people in somewhat different ways" (DoE 1995a: 74). The WPET targets the schooling system for achieving greater efficiency and sustainability. This would, for example, require repetition and drop out rates to be reduced, and thereby increase the quantity and quality of output from the system (DoE 1995a: 75). It cautions that the provision of equitable access to schooling could only be sustained if South Africa is able to achieve the requisite annual growth (DoE 1995a: 75). It states that "restructuring, expansion and qualitative improvement of the school system must be handled in a manner that ensures its financial sustainability" (DoE 1995a:75).

The impact of the limiting financial context on achieving quality school access is illustrated in its operational principles which is expected to facilitate the implementation of access policy. The WPET states that the reception year (pre-primary year) which is the first year of the stipulated ten years of compulsory schooling, would be phased in on the basis of a partnership between the state, non-governmental organisations and communities, with priority given to under-resourced areas. With regard to the nine years of public schooling, it is understood that this has to be paid for from public funds. But, due to financial constraints, the WPET adopts an approach of phasing in free and compulsory schooling over a number of years. In making a distinction between compulsory provision and compulsory attendance, it argues that compulsory attendance can only be enforced when the capacity for absorption has been created. In effect, free and compulsory schooling will only be achieved, and will be enforceable, once the capacity to absorb all children has been created. To achieve free and compulsory schooling the WPET commits the government to the setting of a clear implementation programme with targets, target dates and monitoring and reporting mechanisms, in partnership with provincial departments of education. The WPET obligates the government to provide a teachers policy based on negotiated Teacher-Pupil Ratios and basic physical facilities and equipment at all state schools (DoE 1995a: 75-78).

The WPET adopts a wide-ranging and ambitious policy approach to achieving equitable access to quality schooling. Conceptual elaboration in the WPET is carefully crafted in relation to the magnitude of the project, given the historical backlogs and the constraining financial environment. The WPET binds the government to effecting equitable access, i.e. to schooling of a minimum level of quality to all children. A weakness of the WPET is that there is a lack of clarity on financial allocation among competing priorities within school access. Overall, the WPET's commitment to phasing in equitable access holds promise for the construction of a unified equitable schooling system. It achieves balance between competing demands for quantitative expansion and the qualitative enhancement of the system. It provides a very clear operational approach, the lack of detail notwithstanding, to giving effect to its policy vision. However, the major difficulty lurking in the wings is the impact on school access policy by an emerging macroeconomic framework which would have a limiting effect on achieving its targets. The WPET's vision on achieving school access stood to be compromised in practice by the negative effects of the GEAR macroeconomic policy on its operationalisation. It is to an analysis of the operationalisation of school access policy that I now turn.

6.4.2 The 'fragile state', financial constraints and school funding

School funding policy refers to the guidelines the government has enacted to allocate funding of schools' recurrent or operational costs which is usually a small proportion (about 10%) of the overall financial allocation to schooling. School funding policy is an appropriate yardstick to measure a government's commitment to achieving equitable access[128]. Operational costs involve money for the following: textbooks and other learning and teaching resources, school maintenance such as the repair and upkeep of buildings and sport fields, and recurrent expenditure for electricity, water and telephone.

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[128]. The biggest proportion of the schooling budget is for teachers' salaries. This is being targeted for reduction in the wake of arguments that spending money on school efficiency inputs and other quality enhancing factors is more cost-effective (Crouch 1997). Savings on the teachers bill would presumably be directed to textbooks and other learning resources. However, pressure from teacher organisations has ensured that the current teachers bill remains disproportionately high at 90% of overall school expenditure.

The enactment of school funding policy illustrates the government's approach to achieving equitable access. This is based on the acceptability of moving resources from historically well endowed to under-resourced schools, given the need expressed in the WPET to reach a balance between achieving equity and redress within circumscribed financial parameters. I concur with Motala that in order to address the demand for a qualitatively enhanced schooling system "an immediate challenge to the government is ... to release and redistribute funds towards the most disadvantaged people and to previously marginalised areas, and to ensure an equitable distribution of resources at provincial level so that the process of redress and transformation can take place" (Motala 1997b: 3). School funding is a key input towards establishing necessary, though not sufficient, conditions to realising a unified and equitable schooling system.

The school funding norms were embraced as state policy with the acceptance of the South African Schools Act in November 1996, after a long and intense period of policy development and consultation. The Act provides for the establishment of a uniform system of organisation, governance and funding of schools (DoE 1996d: 5). The funding norms should be understood as part of a broader budgetary trend established from 1994 to 1997, especially the implications for a reduction in the 'real' (as opposed to the raw increase) size of the allocation to education. Motivated by the need for fiscal discipline in order to reduce the budget deficit in conformity with the GEAR macro economic policy, the reduction in the education budget has led to a circumscribed policy environment driven by a 'culture of cutbacks' akin to structural adjustment strategies in other parts of the developing world (see para 2.5).

I have stated earlier that the conceptualisation of equitable school access as expressed in the WPET ought to be understood in the macro context of the RDP's commitment to achieving a balance between equality and an economic growth path. This tenuous position was destabilised in favour of a growth-first development position with the acceptance of GEAR as macroeconomic policy. GEAR has been described as voluntary structural adjustment and as emblematic of South Africa's inability to meet equity objectives (Kallaway et al. 1997: 1-3, Chisholm 1997 and Chisholm et al. 1998). School funding policy was shaped within this narrowing economic and budgetary context.

I have argued in Chapter Four (see para 4.4) that the government has through GEAR embarked upon a macroeconomic path based on a growth-first approach. GEAR adopted a number of mechanisms to enable the economy to achieve higher growth levels. A rapid fiscal reduction programme, the stimulation of foreign investment and the restructuring of state assets are some of the pivotal features of the government's growth strategy. The adoption of a 'smaller state' approach has given rise to policies based on financial cutbacks and shrinking consumption spending. Consequently, social sectors such as health, welfare and education have been subjected to financial stringency. I have argued that this approach has especially pernicious consequences for a country like South Africa which is faced with having to address demands for social equity to overturn deep structural inequality and poverty. Instead of overturning this legacy, GEAR would result in deepening the poverty cycle in South Africa (see para 4.4).

Fuller's conception of the 'fragile state' (see para 6.2) is apposite in describing the nature of the current South African government's position on school funding. The policy trajectory the government has followed has been to closely tie its legitimacy and credibility to the delivery of modern progress through establishing equitable social institutions and practices. Educational reconstruction is one of the most prominent features of the government's commitment to the overall reconstruction of society. Reconstruction language gained prominence, not just as a rallying cry that galvanised popular resistance against apartheid, but also through pre- and post election Reconstruction and Development rhetoric. All public policy was to be imbued with RDP discourse, with the RDPWP declaring that the "RDP is the policy instrument which will direct the progress of the transformation strategy" (RDPWP 1994: 6). However, with the negative consequences of the displacement of the RDP with GEAR becoming clear, the government has become increasingly vulnerable as a result of its legitimacy becoming delinked from the delivery of social equality.

As an indication of the functioning of the fragile state, school funding ought to be seen in the light of the size of educational budgetary allocations between 1994 and 1997. After the election in 1994 the government proceeded with the complex task of providing a unified education budgetary framework based on new norms which would achieve equity among the nine provinces (Chisholm and Vally 1996: 2-3). The budgets of the nineteen different education departments that existed until mid-1994 had to be amalgamated into one system with nine provincial subsystems. The previous nineteen departments had very uneven funding systems. Generally, the former white departments had the highest funding and the former African urban-based departments (ex- Department of Education and Training) the lowest, while some homelands had higher per capita funding than others. The new education funding regime had to develop a consolidated budgetary approach which would be able to target equity among provinces. This meant that historically well endowed provinces would receive less funding than what they were used to, while more funding would be shifted to those provinces, mainly rural and with mostly African pupils, in order to achieve an equitable redistribution of resources[129].

Equity has meant that financial allocations would be reprioritised, but within a smaller overall education budget. Between 1994 and 1997 education continued to receive the highest proportion of the budget. During this period an average 21% of the budget was allocated to education. This constitutes a 6,4% annual average percent of the GDP (see Abedian 1995: 12). This is considered to be relatively high for a developing country. The total expenditure in Rands for the period is: 1994/5 - 30,8 billion Rand; 1995/6 - 31,8 billion Rand; and 1996/7 - 34,1 billion Rand (Motala 1997: 7). This represents a year on year increase in the amount allotted to education, but as Vally (1998: 6) and Greenstein (1997: 3) argue, when inflation for these years is calculated at a conservative estimate of 7%, then there have been sharp reductions for education between 1994 and 1997 in real terms. This downward trend is likely to continue for at least the foreseeable future (Greenstein 1997)[130]. Thus, financial policy targeting equity has been done within a smaller overall budgetary framework. This meant that financial redistribution, especially from richer to poorer provinces, could be brought about, but that redress would be ruled out. Attempts to address the inequalities in schooling ought to go beyond the redistribution of limited financial resources. It has to include dimensions such as the need to address backlogs in provision, the rehabilitation of the basic infrastructure of schools and the restoration of a culture of learning (see Greenstein 1997: 4 and Motala

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[129]. Subsequent to the adoption of GEAR the government started to develop a new decentralised budgetary approach under what has been termed the Medium Term Expenditure Framework (METF). The MTEF attempts to achieve consistency between the government's macroeconomic and developmental commitments. A principal concern of the METF is to bring about equity in spending between provinces (see the Report of the METF Education Sectoral Team, DoEf 1997).

[130]. The Hunter Commission Report takes the view that unless inflation decreases the education budget will not increase (DoE 1995h:65).

1997: 15). A reduced budget is unable to fund these demands.

The school funding norms adopted in the South African Schools Act (DoE 1996d) should be understood in the light of the financial constraints of a limited educational budget, the effect of which has been to delink equity from redress. The norms would lead to a situation where schooling inequalities are reproduced, rather than the development of an equitable schooling system. The origins of the proposal can be traced to the National DoE's appointment of the Hunter Commission to do an investigation into the organisation, governance and financing of schools (DoE 1995d). Subsequent to the release of the Hunter Commission Report two White Papers were published, the first one in November 1995 (DoE 1995e), followed by the second one in February 1996 (DOE 1996a). The South African Schools Bill was released in April 1996 (DoE 1996b). The South African Schools Act was finally adopted in October 1996 (DoE 1996d). It was the outcome of an intensive and contested policy process. As I have stated in Chapter Four, this process saw vigorous participation from especially, but not exclusively, conservative civic groupings who resisted the potentially strong equity and redress thrust of the norms on the basis that it would threaten the quality of education in former privileged schools (see para 4.6). The substance of the school funding norms was determined by external consultants who convinced the DoE that the need to keep middle class children within the public schooling sector should be a key concern.

On presenting options on school funding for consideration by policy makers, the Hunter Commission argued that "there can be no justification for continuing to spend more on learners from wealthier families, and since the Constitution can be interpreted as requiring movement in the opposite direction, the necessity of reducing the levels of per capita expenditure in some parts of the system is real" (DoE 1995d: 67-68). In striving towards a system of financing schools that would facilitate movement to greater equity the Hunter Commission presented three options for consideration. Option One, the so-called minimalist-gradualist approach adopts a gradual phasing-in approach to equalising financing over a number of years. The Hunter Commission viewed this approach negatively in the light of its inability to redistribute resources sufficiently to make a "real difference to the majority of under-resourced schools, which would be 'further ghetto-ised' in an unequal bipolar system" (DoE 1996a: 31).

Option Two, the equitable school-based formula approach, lays heavy emphasis on equity and redress and is directed at raising quality and efficiency in the poorest schools. It suggests an equitable school-based approach which proposes the equitable distribution of resources among all public schools with no fee charges to be allowed, while redress funds are targeted for poor schools. All schools would be able to raise school development funds, but no compulsory fees would be permitted.

Option Three suggests a partnership funding approach which calls for an equal per capita spending where the state's financial contribution would be reduced depending on parental contribution. This approach seeks to balance the principles of equity, redress, quality and efficiency within a framework for partnership funding between government and communities. It accepts that the provision of a quality education is not possible without parental contributions. The Department's contribution to the school's operating costs would be in inverse relation to the income of the parents (DoE 1995d). In other words, the more parents contribute in fees to schools the less funding those schools would receive from the Department. By reducing the funding to those schools more money could be targeted for poorer schools. The Hunter Commission favoured the partnership approach on the grounds of equity, transparency and flexibility (DoE 1995d: 68).

The South African Schools Bill, however, rejected all three recommendations and opted for a fourth one, what was termed the Middle Class Mandatory Fee Clustering (MCMF) option, on the assumption that middle class children should be encouraged to stay within the public system as their parents are most likely to lead advocacy for school change and reform (DoE 1996b: 57). The MCMF option was made at the behest of Professors Colclough and Crouch (DoE 1996a: 33), international consultants to the DoE, after they reviewed the Hunter Commission's Report. The consultants argued that if there is to be a decline of public funds from previously privileged schools, middle class parents would leave the public school sector for independent schools. This has to be prevented in order to retain the lobbying potential of the middle class to compel the government to improve public schooling. The middle class's exodus would also result in a loss of financial and managerial expertise. School funding norms should take into account that the commitment of the middle class to public school education is a prerequisite for maintaining adequate levels of public and private funding in the public school system (DoE 1996a: 34). The MCMF option thus allows school governing bodies to decide on targets for raising revenue to fund expenditure beyond what the DoE would allocate. While all students in public schools will have equal per capita funding, schools would be allowed to set compulsory user fees for which defaulting parents could be sued. User fees would ensure that the middle class does not flee from public schools as this would enable them to retain quality education by augmenting the government's contribution. The MCMF option was upheld as the basis of school funding policy by the South African Schools Act legislated in November 1996 (DoE 1996d)[131].

The assumptions of the MCMF option are highly questionable. Sayed raises doubt about keeping the middle class in public schools simply because they would be advocates for school change. He argues that the middle class would tend to represent narrow self-seeking interests, rather than that of the impoverished schools (Sayed 1997: 729). It is also debatable whether the middle class would in any case stay in public schools given the burgeoning independent school sector in South Africa. Mandatory user fees would have the effect of being exclusionary, despite assurances by the Schools Act that no-one would be disqualified from attending any school if she is unable to pay fees. Exorbitant fees would prevent working class parents from sending their children to middle class schools. With racial integration of any sort occurring on the basis of class, the only black children who could afford to attend these former white fee-charging schools would be from the black middle class. A constraint in this regard is the still rigid racial demarcation of living areas. Black children, by and large, will continue to attend low quality schools in black townships. User fees thus sets up a market mechanism (Sayed 1997: 729) which determines school attendance patterns. Only a small number of black middle class parents can afford the fees to attend former white schools. Anomalously, the black middle class' flight from township schools will deprive these schools of valuable financial, administrative and technical expertise.

The acid test for school funding policy is whether it would lead to equity and redress for township schools and whether it would lay the basis for an equitable schooling system to emerge. The funding norms introduce equal per capita spending for all children. This is an improvement over the situation under apartheid which had a racially differentiated per capita rate. However, Sayed argues that the funding formula is "a further illustration of the tendency towards a dilution of equity and redress in education" (Sayed 1997: 729). The meaning that has been given to equity is to make things equal without building in mechanisms to redress schooling in the impoverished sectors of the system. Given budgetary stringency, the amount is not much higher than that of the former African urban schools (ex-DET). The Hunter Commission suggests that, given financial constraints, per capita expenditure would be somewhere between the current levels of the former DET schools and those in the former House of Representatives (ex-Coloured) schools (quoted in DoE 1996a: 30). Thus, despite the equalisation of per capita spending not much more resources would come into township schools. The silence of the school norms on financial prioritisation for redress is a major down scaling of the government's commitment to phasing in equitable access to schooling.

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[131]. New school funding norms have been promulgated in the DoE's National Norms and Standards for School Funding (DoE 1998a). The new policy attempts to give greater effect to equity and redress, but it still suffers from the constraints of a limited budget (Vally 1998: 8). I do not discuss the new school funding policy as I limit my analysis in this thesis to the period between mid-1994 and mid-1997.

The school funding norms, enacted in October 1996, do not provide a platform to develop a unified and equitable schooling system of a minimally accepted level of quality. It has led to the entrenchment of the privileged schooling sector. This sector has become deracialised through the growth in enrolment of a black middle class who seeks a quality education through the payment of user fees. The position of the existing and emerging middle class, similar to international trends (see para 2 .6), has informed the outcome of school funding policy. However, schooling conditions for the overwhelming majority of black children in South Africa remain deeply impoverished. I now move on to a discussion of the teacher rationalisation process which has been a concrete attempt by the government to give effect to equity in South African schools.

6.4.3 Teacher rationalisation: the equity paradox

I have argued in the previous section that the school funding policy has established a policy approach that has delinked equity from redress as a result of the decrease in educational financing and the inability of the policy to redirect funding to improving township schools. I will now go on to show that the teacher rationalisation process represents a policy approach that is aimed at achieving equity within an overall cost cutting framework. While the policy was meant to achieve significant redistribution of teachers from previously advantaged to impoverished schools and thereby contribute to the improvement of schooling conditions in the latter, the input mathematical approach which has characterised teacher rationalisation failed to achieve the desired results. On the contrary, as it has played out at the level of practice, the policy has led to the further entrenchment of inequality in the schooling system.

The antecedents of the teacher rationalisation policy in the post apartheid period can be traced to the unequal per capita expenditure for the different races under apartheid. The Pupil-Teacher Ratio (PTR) varied significantly from group to group. By 1990 the PTRs for the four race groups were: African - 49:1; Coloured - 22:1; Indian - 20:1; and White - 17:1 (NECC 1993a: 24). As an input these PTRs are indicative of the vast racial disparities of schooling under apartheid. These are compounded when other resource inputs, such as teacher qualifications, school funding, school buildings, learning resources and voluntary parental contributions, are taken into account. The White, Coloured and Indian schooling sectors had gone through a teacher reduction process in the early 1990s in order to increase their low PTRs. This, though, was not tied to shifting teachers to African schools, as has been the intention with the current rationalisation process. Teachers received lucrative retirement packages as a means of enticing them to leave the service of the Department. The policy was severely resisted in Coloured schools by many teachers, pupils, parents and SADTU (see Fataar 1996: 37-39). Chisholm and Vally suggest that the post election rationalisation policy is based on the apartheid state's teacher rationalisation model which was informed by the Education Renewal Strategy (Chisholm and Vally 1996: 5). The link with the teacher rationalisation process of the early 1990s points to the confluence of education policy in the pre and post election period.

The rationalisation policy was underpinned by the restrictions of a limited budget. The WPET called for budgetary reforms based on equity in order to overcome the racial disparities in the schooling system (DoE 1995a: 62). One of two principal means to achieve this is to introduce equitable PTRs. The other strategy is to address the skewed racial profile of teacher qualifications which perpetuates a skewed distribution of teacher costs because of white teachers being better qualified than their black counterparts (DoE 1995a: 62). The WPET suggested that the new PTRs would be higher than the Indian, Coloured and White norms but significantly lower than in African schools. The target would be to reduce class size in African schooling and thereby engender improved quality in the majority of schools (DoE 1995a: 63).

The newly established provinces became the basis around which the rationalisation plan would be implemented. Previously well endowed provinces, so regarded because of their low percentage of African pupils relative to other race groups, would be expected to bear the brunt of the plan. In accepting a three-year plan to shift resources between provinces in conformity with equity targets (Financial and Fiscal Commission 1996 quoted in Chisholm et al. 1998: 6), the National DoE established new PTRs of 40:1 in primary schools and 35:1 in secondary schools. The new PTRs would be phased in over a three-year period. These ratios were agreed to in the newly constituted Education Labour Relations Council (ELRC), in which all officially recognised teacher organisations participated (Govender et al: 1997: 9). Unions such as SADTU and the National Professional Teachers Organisation of South Africa (NAPTOSA) agreed to these ratios in support of equity as a political principle. These organisations later withdrew their support after it became clear that the agreement to redistributing teachers had effectively led to down scaling of the number of posts (Govender et al 1997: 10).

The ELRC agreement reached in April 1996 concurred on a 'Three Year Conditions of Service Adjustment Package for Educators' (as cited in Chisholm and Vally 1996: 4). Two rationalisation strategies were decided upon in order to achieve equal PTRs between and within provinces. Firstly, a severance package was offered to enable teachers to leave the profession voluntarily. The cost of the packages was projected to be R600 million. This would be raised from foreign countries by President Mandela who committed himself to ensuring that no teachers would be retrenched. The second strategy would be to redeploy teachers from schools where they are in excess to either schools within the provinces that have shortages, or to other provinces that require more teachers (Motala 1996: 9). An important point to note about the ELRC agreement is that the redeployment of teachers would take precedence over the granting of the voluntary severance package. Severance packages were presented as an alternative to redeployment only if teachers who have been declared in excess, could provide a persuasive motivation for why they should not be redeployed (Motala 1996: 9). Provinces were required to set up right-sizing committees in order to identify and operationalise a coherent approach to implement the rationalisation process. Individual schools too were required to set up right-sizing committees. The rationalisation plan elicited much conflict and anger between teachers and school communities at working class Coloured schools in the Western Cape. They feared that the already tenuous levels of quality would be further eroded by the reduction of teacher numbers in their schools (Fataar 1996: 39).

Initially it was expected that discretion would be applied in offering the severance package to teachers. The teacher organisations wanted to ensure that only those teachers who were deemed in excess in regard to under-enrolment in specific subjects would be required to leave. Protecting teachers who taught valued subjects such as mathematics and science was also a key consideration (Mokgalane and Vally 1996: 13). Thus, teachers who would be declared as 'supernumery', i.e. those teachers in excess because of under-enrolment in their subjects, would be granted the severance package. However, there was reluctance on the part of teachers to apply for the severance package because of the resistance that the policy elicited (Fataar 1996: 38). In an attempt to depoliticise the issue and thereby entice teachers to leave the system, the DoE decided to make the severance package available to any teacher who applied (Motala 1996: 9). Arguably, it was this impetuous decision that threw the rationalisation plan into complete disarray.

With the way now open for any teacher to apply for the voluntary package, the DoE had by March 1997 approved about 15 000 packages at a cost of R1 billion. This was R400 million above the R600 million initially projected to fund the packages (Govender et al 1997: 9-10). Most of these were granted in the Gauteng and Western Cape Provinces at an average of R66 000 per package. This figure excludes the pension and leave amounts that were added to each package. The severance packages have made a severe dent on the country's fiscus which is ostensibly in the grip of tightened financial control. The South African taxpayer had to foot most of the bill, as the government's attempt to get money from foreign countries had not achieved major success (Govender et al 1997:10). Thus, having been presented as a major financial reprioritisation exercise, the teacher rationalisation plan had increased the financial burden for the National DoE. Most of the teachers who left the employ of the DoE were either in positions of senior management, or had skills which would allow them to find employment outside public schools (Govender et al 1997:9). Many of these teachers took jobs in the independent schools sector. Crucially, policy enunciated in many policy documents as to the importance of subjects like Mathematics, Science and English (see WPET 1995a: 30) have been undermined by the departure of many teachers who could offer these subjects (Govender et al 1997).

The attendant policy of redeployment suffered a severe blow when a group of eighty schools in Cape Town under the leadership of Grove Primary School successfully challenged the redeployment policy in the Cape High Court. The Court ruled that teacher appointments to schools could only be made through a process of consultation between the provincial education department and a school's governing body. The National DoE is not allowed to make decisions with regard to appointments. Because the ELRC process that decided on the redeployment policy was concluded at a national level, the Court's ruling meant that the policy was now null and void (see Motala 1997: 8).

The kernel of Grove Primary School's case revolved around the policy prescription that schools with teacher shortages had to choose from a list of teachers given to it by the provincial department. This list was made up of teachers who have been declared in excess. The Grove lobby resisted this on the basis that it should not be restricted to the prescribed list and that it should have the right to employ any teacher (Jansen 1998: 5-12). The National DoE's position was that it had to provide work for these excess teachers within the public system. The success of the redeployment plan depended on the efficacy of reappointing the teachers in other public schools. The Court in effect ruled that schools are not compelled to employ teachers from the redeployment list. This caused much racialised discontent among black teachers and organisations such as SADTU and the Cape Professional Teachers Association, who saw the court challenge as a veiled attempt to protect 'white privilege'. Most teachers that were up for redeployment were black. Jansen in an incisive paper shows convincingly that the Grove challenge is much more complex than the attempt to portray it as motivated merely by the protection of racial privilege (1998: 9).

A damaging outcome of the court ruling was that it stopped the redeployment process. The much-vaunted equitable redeployment of teachers to schools with high PTRs has thus not taken place. Many temporary teachers therefore had to be employed in black schools in order to achieve lower PTRs, which in turn led to an increase in the teachers wage bill, instead of a projected decrease (see Chisholm 1998: 8). The DoE admitted in

December 1997 in an internal memorandum that its rationalisation plan was in crisis (quoted in Chisholm 1998). After extensive negotiation and policy development the DoE adopted a new approach and procedure to get the redeployment of teachers off the ground[132].

The implementation of the equity-driven teacher rationalisation and redeployment plan has further entrenched the educational disparities in the schooling system (Govender et al. 1997: 10). The input mathematical approach to shifting teachers around has run aground in the context of a complex set of responses that was not anticipated by policy makers. The simplistic input approach of moving teachers around to achieve equity in PTRs has been criticised for not factoring in quality in education outcomes. Motala argues that the redeployment of teachers would not necessarily achieve educational quality if it is not linked to other in-school redress strategies (Motala 1996: 9). Instead of improving schooling in poor black townships, the failure of the teacher rationalisation plan meant that the government failed to put township schools onto a path of qualitative improvement. On the contrary, it has generally contributed to demoralisation among teachers at black schools which did not have a high level of quality to start with. Most former white schools could on the basis of charging user fees (see the previous section on school funding) appoint teachers from their school budgets in order to replace the teachers who took the package. Because of not having the necessary parental user fee base, township schools cannot afford extra teachers. Paterson and Fataar (1997) compared the different types of response to teacher rationalisation by township and former white schools. They concluded that the latter schools have the managerial capacity and financial wherewithal to adapt in order to protect their schools' quality, though not without pain and stress. The township schools, however, do not possess the managerial flexibility or material base to respond creatively to budgetary cuts (see Paterson and Fataar 1997: 8-12)). The attempt at achieving equity through the teacher rationalisation policy has had the paradoxical outcome of reproducing existing and new patterns of privilege in the new context. The poor predominantly black schooling sector remains trapped in a perpetual cycle of dysfunctionality and low quality.

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[132]. See the memorandum released by the DoE on 17 November 1998 (DoE 1998b) for an outline of the new procedures for the rationalisation and redeployment of teachers. These procedures are not discussed here.

6.4.4 'Signalling' and the RDP Culture of Learning Programme (COLP)

The complexity of educational change and transformation in South Africa is borne out by the RDP's Culture of Learning Programme that was operationalised over a period of two years. The COLP represents a significant attempt to circumvent entrenched bureaucratic procedures and line functions such as financial disbursement and project approval. The COLP also had to contend with the new provincial bureaucratic structures that were being set up. The two RDP projects connected to education were the primary school nutrition programme run by the Ministry of Health in conjunction with the Ministry of Education, and the COLP (Govender et al. 1995: 7) which included physical school refurbishment and developing school managerial capacity. I focus in this section on the COLP with reference to school refurbishment, with the view to understanding the government's endeavour to implement policies based on improving the capacity of township schools to deliver equitable access. I attempt to show how a fragile state like South Africa went about demonstrating its seriousness in delivering a transformed schooling system.

In a recent article Christie describes what is meant by the breakdown of the culture of learning and teaching thus:

> What this refers to is the poor functioning of a large number of previously black schools in South Africa. These schools, generally secondary schools located in the poor and disrupted communities spawned by apartheid, share a number of common features. These include: disputed and disrupted authority relations between principals, teachers and students, sporadic and broken attendance by students and often teachers; general demotivation and low morale of students and teachers; poor school results, conflict and often violence in and around schools; vandalism, criminality, gangsterism, rape and substance abuse; and school facilities in a generally poor state of repair (1998: 283).

It is widely accepted that the catch phrase 'the collapse of a culture of learning and teaching' refers to black township schools (see Chisholm and Vally 1996). The notion received formal sanction by the government at various levels. Reference to 'culture of learning' has been enshrined in legislative enactments (see DoE 1995a, DoE 1996a, DoE 1997c). The Gauteng Department of Education's Schools Act underlined the role of teachers in promoting the key issue of a culture of learning and teaching in schools (Gauteng Department of Education 1995: 29). Editorials, articles and advertisements in the media further entrenched the widespread currency of the phrase. It is widely accepted that this impoverished culture should be addressed as a high priority (Chisholm and Vally 1996). But, as Christie points out, "what is less clear, however, is what may be done about it, particularly given the continued shortages of resources for schooling" (Christie 1998:284).

Part of the problem with the COLP , which ran between late 1994 and late 1996[133], was one of definition. The concept 'culture of learning' is too nebulous to suggest any clear consensual understanding of how school improvement is to be addressed. The popular understanding of the concept is linked with issues relating to establishing a stable learning environment. However, the use of the concept in legislation captures a broad symbolic vision of change without any clear implementation strategies or operational mechanisms (Christie 1996: 76 and Fleisch 1995: 8). By stating that the COLP would focus on physical improvement of school buildings without clarifying how this might be related to restoring the culture of learning in the classroom (see WPET 1995a), it has been open to the criticism that the transformation of school pedagogical relations and educational quality would not be addressed. As I show below, the implementation of the COLP further reinforced this view.

Paterson and Fataar hold that the usage of the term 'culture of learning and teaching' emphasises an understanding that there is something lacking in schools which they refer to as "a deficit model of the culture of learning" (1998: 4). They identify three types of deficit: behavioural deficits which suggest that the problem lies in a lack of discipline and order; productivity deficits which refer to the lack of a work ethic of pupils and teachers; and finally physical deficits which focus on physical deprivation of schools. Presumably all three aspects have to be addressed in a coherent approach to reestablishing appropriate learning conditions[134]. I will argue below that the government has through the

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[133]. A new DoE-driven initiave came into being in July 1997. This initiative is not included in this analysis. The so-called Culture of Learning, Teaching and Service Campaign (COLTS), under the leadership of Deputy Minister of Education, Father Smangaliso Makatswa, would now focus on providing learning resources, capacity building for school governing bodies, developing an education charter and combatting violence in schools. Unlike the RDP COLP, the Education Ministry hopes to fully integrate the new COLTS campaign into the National and Provincial Department of Education (Govender et al. 1997: 6)

[134]. Many would argue that the task is not about 'reestablishing' old apartheid pedagogical structures and institutions, but that a school development discourse ought rather to be guided by the transformation of teaching and learning (see Christie 1998: 293-297).

COLP given credence to addressing only the physical deficits of schooling. This was done within the following parameters: the RDP's attempt to signal delivery of progress in the transformation of schooling, attempts to circumvent old bureaucratic line functions, and the new bureaucratic structures associated with provincialisation. The COLP amounted to a strategic intervention by a fragile state, operating within huge resource constraints, to signal its commitment to educational transformation. The symbolism inherent in the term 'culture of learning and teaching' was marshalled to signal this commitment.

The COLP was one of twenty-two Presidential Lead Projects announced by President Mandela in his opening address to the parliament on 10 May 1994 (Christie 1996: 65). These Projects constituted an attempt by the government to give maximum visibility to the RDP's commitment to changing the way the government would function in order to meet demands for social transformation. Some of the criteria for these Projects were: to attain a high impact on communities, community empowerment, job creation, visibility, financial leveraging, have departments change their developmental priorities, and economic and political viability (RDPWP 1994: 15). While Lead Projects such as the COLP started off as high profile once-off projects separate from existing bureaucratic line functions, they were meant to be fully integrated into their respective departments. Through these projects the RDP concept was to be infused into the entire state system. The COLP had to avoid becoming an add-on programme that might be sidelined from the DoE's priorities. Thus, the Presidential Projects were not primarily about delivery of basic services. Their key function was to provide leverage and pressure on the normal functioning of the state and bureaucracy. State structures had to be reorientated to service the RDP objectives (RDPWP 1994:6-7).

As outlined in the RDPWP the aim of the COLP was to restore a culture of learning in educational institutions. The programme would cater for physical improvement of school buildings as well as quality of learning by targeting the improvement of school guidance[135]. The scope of the programme would involve the rehabilitation of damaged schools and the construction of new schools (RDPWP 1994: 46). The latter never actually became part of the COLP programme. Two phases were identified for the implementation of the programme. The initial planning would take place between September and December 1994 and the implementation phase would be from November 1994 until 1999. But, by late 1996 the COLP had been winded down. The RDPWP omits to spell out what the connections might be between school refurbishment and restoring the culture of learning. While this omission is in part the result of unclarity about the definition of 'culture of learning' (Fleisch 1995: 8), the lack of clarity about this connection has given rise to the perception that the COLP is merely an ameliorative mechanism to placate expectant school communities instead of providing genuine improvements in the conditions of learning at schools.

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[135]. The drafters of the RDPWP were not sure what was meant with the term 'school guidance'. One drafter commented that many people had at the time spoken about the concept and that it seemed like a good idea to put it in (Christie 1996: 66).

The COLP was coordinated nationally by the National Coordinating Office set up in January 1995 as an agency of the National DoE. The National Office played the role of coordinating and providing guidance to provinces, while the provinces were responsible for implementation. The main brief of the Office was to assist the provinces in drawing up their business, financial and implementation plans. The National and Provincial Offices were required to monitor and report monthly on the progress of the COLP which had to be based on a credible set of Key Performance Indicators. New management processes had to be instituted in order to facilitate the effective functioning of the COLP. It required the national and provincial DoE's to undertake a process of strategic thinking to incorporate the work of the COLP (RDP COLP 1995a: 3).

RDP Project funding came from a number of sources. The biggest allocation came from state departments who had their budgets top sliced. Substantial contributions came from international and domestic grant aid, interest earned from investments made from RDP funds and a tax levy (Christie 1996: 65). The possibility of extra revenue from lotteries and gambling was also considered but has yet to be implemented. In line with the need to have the RDP Lead Projects incorporated into the mainline functioning of Departments, once-off funding was given to kick-start projects. All recurrent and carry-over costs following after the initial project had to be carried by the respective Departments. R100 million was allocated to the COLP for the 1994/5 financial year but by the end of 1995 only R40 million had been spent (DoE 1996e: 47). For the 1996/7 financial year an amount of R300 million was made available to the COLP, but only R110 million was spent by the end of 1996. The inability by provinces to spend their allocated amounts has to do with problems associated with the transition. Two of these were: the lack of personnel due to delays in staff appointments, and inadequate financial and administrative skills which affected the smooth running of the project. The lack of managerial skills affected the provinces' capacity to develop business plans which were a precondition for the release of funds (DoE 1996e: 47). Frank Meintjies, the then chief director, Human Resource Development in the RDP Office (which was closed in 1996), commented that the inability to spend RDP allocations was the result of the provinces' lack of capacity to absorb and allocate money (in Chisholm 1995: 5).

Tight controls were placed on COLP spending. Provinces had to supply rigorous business plans which included monitoring and monthly reporting. The business plans had to include a list of Key Performance Indicators for the purpose of evaluating progress. Some of these indicators prescribed by the COLP National Office were: dates for commencement of work, actual dates when work started, percentage of jobs completed at the end of each month, number of days on the job, which workers were employed (e.g. women, youth, the unemployed), number of new jobs created, training provided, size of contractors employed (small, medium), amount of money allocated to the job, additional costs incurred, amount of money expended (at the end of each month) and the total spent on each school (COLP National Coordinating Office 1995: 6). The indicators conformed with the general RDP criteria which emphasised empowerment, savings and efficiency, and job creation.

The COLP had to establish its operational mechanisms within the constraints of existing bureaucratic and organisational structures and procedures on the one hand, and the formation of new provincial structures on the other. While the political transition brought about changes in political and legislative control from a minority to a majority government, there was not a concomitant shift throughout the bureaucracy and civil service. Conservative influences were still prevalent in state structures and procedures such as in the appointment of public servants, financial control, tendering and processes for government contracts (Fleisch 1995: 9). While the RDP was meant to develop a strategy to circumvent the then existing bureaucracy, the COLP was forced to operate within very rigid bureaucratic lines. For example, the access to disbursement of funds proved to be a delaying factor in many provinces. Largely because of the lack of bureaucratic flexibility, difficulty with the flow of funds was experienced in Mpumalanga, Gauteng, Northern Cape and the North West (see Chanza 1995: 3-11). This caused a delay in the implementation of RDP school programmes. The Gauteng Project Manager expressed great relief when a process to "rapidly turn around cheques awarded to schools" (Bloch 1996: 149) was put in place. He observed that "financial backlogs could have sunk the programme" (1996: 149). He commented that instead of being hamstrung by the inability or unwillingness of the bureaucracy to support the COLP's work, the setting of a climate of cooperation rather than hostility, ensured that diverse forces could work together to achieve results. When old practices and relationships were "shaken up the bureaucracy showed itself to be a resource and have the capacity to change" (1996:153). However, Christie commented that in general, the bureaucrats from the old order who did not support the new initiative used their power to block it[136].

The initiation of the COLP coincided with the enormously complex processes involved in establishing the nine new provinces. During this period the provinces concentrated almost exclusively on setting up new line functions and developing organograms. An intensely political process, the provinces established a number of task teams to give effect to provincialisation[137]. The COLP was built into the line functioning of some provinces, but was left out by most. Fleisch (1995: 10) comments that the first months of the new government had been consumed by crisis management and that the inability of the COLP to be incorporated into the bureaucracy meant that it became part of the process of crisis management. This had the effect of the COLP becoming a marginalised add-on project instead of being infused into the mainstream of the provincial education departments.

The impact of old bureaucratic structures and setting up of new provincial structures had the cumulative effect of delaying and eventually marginalising the work of the COLP. Fuller's conception of the role of bureaucracies in achieving improved schooling provides an important frame to understand the COLP (see 6.2). He contends that fragile states, i.e. states who have to effect redress with limited resources, set up elaborate centralised bureaucracies in an attempt to deepen the effects of schooling. Drawing on Fuller, I contend that in aiming to give effect to the objectives of the RDP, the COLP programme amounted to an attempt at circumventing fortified patterns of state power. It also had to contend with the newly emerging provincial bureaucratic structures. In order to achieve its objective, the COLP in turn set up a national bureaucracy to give effect to the improvement of schools. However, the COLP, having been marginalised by the provincialisation process, failed to reorientate the functioning of the educational bureaucracy to service the needs of providing improvement in the quality of schooling.

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[136]. This seems like a highly generalised statement which stands in need of much greater interrogation. The role of the bureaucracy in the transition is often widely misunderstood and stereotyped. I have, however, attached weight to Christie's observation because of her role as a senior researcher for the National COLP office (see Christie 1996).

[137]. The provincialisation of the education departments that took place from May to December 1994 was based on the Education Coordination Services document prepared by the apartheid-era bureaucrats (see Education Coordination Services 1994).

The COLP had varying levels of achievement among the provinces. A standard format of consultation and popularisation of the school refurbishing programme was followed. Attempts were made to have communities drawn into the process in order to generate a sense of community ownership. Community organisations, Parent Teacher Student Associations (later replaced by school governing bodies in terms of the 1996 Schools Act), civic organisations and SADTU were consulted on the nature of the renovation programme (Chanza 1995: 3). Schools were encouraged to submit detailed business plans. Half of these submissions in Gauteng had to be referred back to the schools for more detail (Bloch 1996: 147), indicating the uneven capacity in township schools to interact with bureaucratic procedures. Provinces followed varying approaches to school refurbishment. In provinces such as Mpumalanga, Eastern Cape, Northern Cape and Kwazulu-Natal an average of about fifty schools per province were identified for extensive repairs (RDP COLP 1995b: 3-11). In Gauteng, 1414 disadvantaged schools received R8 000 each to assist school communities to do small-scale essential repairs (Bloch 1996: 142). Gauteng viewed COLP money as a stimulus to get communities involved in school development (RDP COLP 1995b: 7). The Western Cape initially decided on spending about R150 000 on 80 of the province's most dilapidated schools (RDP COLP 1995b: 11), but changed this to cover about 300 schools at an average cost of R50 000 per school (Greenstein 1995: 7). The most earnest use of COLP money was in the Northern Province. Drastic measures were required to alleviate the huge backlog in classrooms and the high PTRs. 940 Canvas tents were provided as an urgent intervention to alleviate the classroom shortage.

A major consideration in determining the nature and extent of the COLP in the various provinces is the amount of political mileage that could be gained from having a highly visible campaign that could signal the government's seriousness in delivering transformation to communities. All the provinces had high profile launches of the school renovation projects. Gauteng's launch in February 1995 in Soweto was attended by sport and community personalities (Bloch 1996:149). Gauteng's decision to have the COLP cover as many schools as possible was partly motivated by its Education Ministry's desire to establish legitimacy for its work in impoverished communities. In the initial stages the Minister of Education was very hesitant to give approval to a project that might not succeed (Bloch 1996: 148). She wanted to be assured that the project would be able to deliver tangible results which could boost the work of the Ministry.

The COLP amounted to an innovative project by the government to imbue its work with the ethos of social transformation. The COLP was meant to influence and even reorientate the functioning of the DoE. Presumably, contributing to the provision of the necessary conditions to establish equitable access to schooling had been a major driving force. The COLP had been a self-contained attempt to address impoverished conditions in schools. The culture of learning would, so many believed, be enhanced by refurbishing schools. The chosen approach had been to target the physical dimension of the culture of learning. The COLP operated within the twin constraints of on the one hand an old bureaucracy that did not share its vision, and on the other hand the convoluted and complex processes involved in the provincialisation of education. Consequently, instead of main streaming the RDP approach, the COLP became marginalised as an add-on project. The government's down scaling of its commitment to the RDP in favour of GEAR also had a disorganising effect on the objectives of the COLP. The results of the school renovation programmes have been uneven. It stands in need of greater analysis. What is, however, clear is that the physical school renovations had come to play a powerful role in 'signalling' the government's commitment to the restoration of the culture of learning. The COLP was received with enthusiasm by communities (Bloch 1996: 147-149). However, to the extent that the COLP was limited to physical renovations, the government failed to display commitment to the other equally important dimensions (behavioural and productivity deficits) of the culture of learning in schools.

6.5 Conclusion

I have analysed the government's policy and practice with regard to its self-defined objective of establishing the conditions for equitable access to schooling for all its children. Equitable access refers to establishing the necessary conditions for the emergence of a unified schooling system based on a minimally acceptable quality of education. The analysis concentrated on three policy aspects central to schooling. The WPET's view on schooling access served as an analytical benchmark against which I measured the unfolding policy and practice between mid-1994 and mid-1997. The WPET argued for a phased and realistic approach to implementation of access policy located within a sensitive understanding of the inequitable legacy of schooling on the one hand, and the restrictive contemporary financial context on the other hand. My analysis of the school funding policy, the teacher rationalisation plan and the RDP COLP initiative has led me to the conclusion that the government has decisively down scaled its commitment, as expressed in the WPET, to developing an equitable schooling system. In the context of a decreasing commitment to education, the government's efforts in 'deepening the effects of schooling' resemble what Fuller describes as a fragile state's attempt to signal modern progress and transformation (see 6.2). With the government's macro economic policy cutting away its ability to bring about a quality schooling system, signalling transformation replaced actual transformation in the arena of schooling access.

The COLT programme was meant to imbue the DoE's functioning with a new orientation in line with the transformative principles of the RDP. In practice, despite heroic attempts by implementation officials to achieve a new orientation, the COLP amounted to signalling a commitment to delivering change at schools. However, being tied to the representation of the culture of learning as only limited to making physical improvements to schools, the COLP displayed a lack of commitment to qualitative improvement of conditions of learning in township schools. School funding policy and the rationalisation of teachers have been enacted within a reduced educational budget. This has had the paradoxical outcome of policy that was meant to target the achievement of equity, but which in practice would lead to greater inequality between rich and poor schools. Instead of unity and equity, South Africa's schooling system is still fragmented and unequal, with the majority of black children exposed to a low quality schooling system.

Chapter 7: Conclusion

This thesis has provided an analysis of the post apartheid government's policy vision that would guide the reconstruction of South Africa's inequitable education system. Education policy development was characterised by an evolving policy trajectory. From mid-1994 until about the end of 1995 policy was characterised by ambiguity, or what I have referred to as an unstable equilibrium between an equality discourse on the one hand, and a development and economic growth discourse on the other hand. This situation was decisively resolved during 1996 with the government's acceptance of the GEAR strategy as its preferred macroeconomic framework and the NQF as its complementary policy framework in the realm of education (see para 4.4 and 4.5). By July 1997 a decisive vision of educational reconstruction and reform was established especially in the light of the adoption of Curriculum 2005 as school curriculum policy. I have provided an analysis of this unfolding policy trajectory and the vision of education preferred by the government (see Chapters Four, Five and Six). The main conclusion I have arrived at is that education policy is characterised by a restricted vision of reconstruction which would not provide the necessary basis to develop an equitable and united education system.

The 'radical' narrowing of education policy materialised in a complex and circumscribed policy context. The focus of my analysis has been on the dynamic interaction between the structural dynamics that delimited the formation of social relations and institutions, and the political and policy dynamics that shaped the outcomes of education policy. Specific developments in the sphere of education, given its relative autonomy, shaped the eventual outcome of policy. Given the interaction between the structural and political dimensions, the government made very definite choices in giving effect to its favoured vision of educational change.

The nature of the political settlement and the unfolding socioeconomic framework together played a fundamental role in shaping the outcomes of macro education policy. The transition to a negotiated political settlement circumscribed the ability of the government to give effect to a radical transformative policy agenda. Contrary to popular perception, the negotiated settlement eventuated in the displacement of radical transformative objectives by a narrow reform orientation. The constitutional framework entrenched liberal democratic rights while failing to guarantee the exercise of social rights such as the right to housing, free education and health. These were relegated to the realm of delivery given 'existing capacity'. Thus, the political character of the settlement impacted negatively on the ability of the government to give effect to a viable agenda of transformation in education, and arguably in other sites of public provision.

A crucial element in understanding the nature of the political conjuncture during the 1990s is the impact of the history of inequality and reformism that characterised the apartheid era. I showed in Chapter Three how education policy under the apartheid state was shaped in dialectical interaction between education and the unfolding socioeconomic and political development of South African society. Education policy reform under apartheid vacillated between the NP's racial separatist ideology and the demands by industrial capitalism for appropriate forms of urban social reproduction. The political settlement of 1994 accommodated the requirement to secure the basis for capitalist social reproduction in line with the need for South Africa to enter the global economy. The apartheid state's reformism during the 1980s failed to secure this new form of reproduction because of its refusal to scrap its race-based policies. The official deracialisation of South Africa in 1994 was a central element in laying the foundations for capital accumulation and gearing the economy towards entry into the global economy. I have suggested that the education policy making arena was characterised by a negative ideological and political context. In the light of this I have favoured the view that a policy vision for reconstruction should take account of the existing inequalities and power relations in society. In order to avoid a triumphalist notion of change, I have argued that educational reconstruction has to be conceptualised as part of an overall long-term complementary socioeconomic development programme.

The conservative turn in both socioeconomic and education policy was the outcome of the government's choice of a macroeconomic framework that targeted the country's economic entry into the global economy as the principal and overarching policy ideal of the post apartheid period. The RDP programme, adopted in the early days of the GNU, was an attempt to keep the contradictory pressures of equality and economic development in tension as the conceptual undergirding of socioeconomic policy. However, the choice of GEAR to replace the RDP was a clear preference for a 'growth first' strategy on the basis of which redress and redistribution would be at the receiving end of a trickle-down type of economic policy. Many labelled this as 'voluntary structural adjustment' in reference to the absence of direct pressure from northern monetary institutions to move in this direction. This is not to discount the manifold pressures brought on by global political and economic dynamics which the government could not ignore in its choice of developing a functioning export-led economy and attracting foreign investment However, I have argued that the many internal contradictions that beset the GEAR strategy would result in the failure of its macroeconomic vision. GEAR's preference for economic development along post fordist lines in order for the economy to become more globally competitive, is unrealistic and unattainable given the uneven and underdeveloped nature of the current economy. GEAR's projected percentage increase in economic growth and employment was not attained. The phenomenon of jobless growth became a reality. GEAR's proposed measures in areas such as trade liberalisation and exchange controls made domestic industrial sectors such as retail and clothing vulnerable. By the end of 1997 many of GEAR's policy targets have not been attained (Marais 1998). The most important consequence of GEAR on public policy was the principle of fiscal discipline in terms of which spending on the public provision of social welfare was decreased. In education this meant that for three consecutive years from 1995 the education budgetary increase in real terms was below the inflation rate. Internal budgetary reprioritisation, not budgetary increase, became the chief mechanism to fund the government's commitment to equity in education. Funds from a smaller overall education budget had to be moved from certain parts of the education system to other more disadvantaged parts of the system. As the aborted teacher rationalisation plan illustrates (see para 6.4.3), policies that attempted to give effect to internal budgetary reprioritisation had disastrous consequences, incurring greater costs which ran contrary to the need for fiscal discipline. And, as I have argued in Chapter Six, the government's minimalist approach to school funding will not enable the majority of poor schools in the country to rebuild their shattered physical conditions which is a necessary, if not sufficient requirement, to establish functional learning cultures.

Developments in macro education policy have to be understood as the outcome of its interaction with the narrowing socioeconomic approach to societal reconstruction. A conservative education policy discourse was established concomitant to the neo-liberal orientations of the GEAR strategy. In tracing the unfolding policy trajectory I have advanced the view that the WPET's (March 1995) policy vision, similar to the RDPWP's position, incorporates the concerns of both equality and development. The WPET is characterised by a redistributive discourse that commits the state to the integration of education and training, lifelong learning and the overhaul of all aspects of education in building an equitable, just and high quality system. It embodies a strong forward mapping approach about the vision of a new system, but fails to root its policies within implementation dynamics. This, I have argued, opened up space for policy contestation that impacted upon subsequent policy. The WPET's redistributive thrust is tempered by a constrained financial environment. The need for fiscal discipline played a major role in determining its approach to conceptualising policy. But overall, similar to the RDP, the WPET displays an unstable equilibrium between equality and economic development. While it is committed to operating within the ambit of fiscal restraint, its policy approach is characterised by an all-encompassing attempt to restructure education.

A definitive education policy vision only emerged during 1996 in the process of the substantive development of the integration of education and training under the NQF. The NQF was presented as a key part of the GEAR strategy. Both are grounded in an economic growth agenda. The NQF is expected to produce the necessary sophisticated technological labour that would undergird the development of a globally competitive economy. The idea of integrating education and training is based on developing an inclusive system that would be able to incorporate adults, workers and out-of-school youth into the education system. Integration would address the need for greater access to and mobility within the education system. The NQF envisages multiple sites of educational delivery and a flexible qualifications framework that would provide expanded learning opportunities for those outside the formal education system.

However, I have argued in Chapters Four and Five that the NQF's preferred pedagogical approach and assessment methodology, driven by industrial training interests, resulted in a narrow pedagogy in the realm of the school curriculum. While OBE might be suited to the needs of training for measurement and demonstration of skills and competencies, teaching to predefined outcomes in educational contexts such as schools would undermine the development of a democratic pedagogy that is based on open-ended and critical enquiry. OBE is an essential part of the NQF's attempt to effect closer alignment between education and the economy based on the human capital theory view that education, among other factors, should play a leading role in constructing a competitive economy. This is predicated upon the flawed assumption that socioeconomic development is in major part dependent upon the ability of education to produce skilled workers. I have argued that the logic of the GEAR strategy and the NQF is internally inconsistent and flawed. GEAR will not enable the development of a sophisticated post fordist globally competitive economy, nor will the NQF achieve a high skill HRD strategy. Thus, the relationship between GEAR and the NQF would not be sustained. The government's choice of the NQF as the pivotal feature of its macro educational framework, and OBE as the curriculum model, encompasses a narrow and conservative vision of education reconstruction.

Turning to the politics of policy making in terms of which the education policy conservatism was achieved, a number of developments before and during the period coalesced to give shape to policy. The moderate constitutional dispensation impacted on the nature of education policy which compromised attempts to imbue policy with a redistribution ethos. Provinces were awarded semi-autonomous powers in educational decision-making which enabled them to adopt legislation that focuses on the implementational dimension of policy. This gave provinces such as the Western Cape the ability to retain a conservative policy thrust in order to protect its relatively privileged status which resulted in incongruence between national and provincial education policy. Examples of a conservative trend can be detected in the Western Cape's 'elaboration' in its provincial legislation of national policy with regard to school governing bodies, mother tongue education and religious observances. Furthermore, two instances of court challenge were brought by various bodies against national legislation. These were: 1) the successful challenge against the teacher rationalisation and redeployment plan which brought the government's attempt to effect equity in public schools to a halt (see para 6.4.3), and 2) the unsuccessful challenge against dropping school admission requirements on the basis of language and religion (see para 4.6.2.3). These challenges illustrate the complexity of advocating particular policy positions in a democratic environment made up of competing interests, as much as it highlights the difficult legal and constitutional environment in terms of which a coherent policy framework has had to be developed.

An important feature of the negotiated constitutional dispensation which had a deleterious effect on the ability of the Ministry of Education and Training to develop a coherent policy framework was the protection of the jobs of senior civil servants in the education bureaucracy. While the policy rhetoric pronounced on the need for redress, the real power to change the functioning of the educational bureaucracy remained largely in the hands of the apartheid-era bureaucrats. Through their expertise, knowledge of the policy process and an accommodating human relations approach they maintained technical, though not political control, over the policy process. The school curriculum policy process indicates that the apartheid-era bureaucrats exercised technical control over the process, while the incoming bureaucrats had political control. The influence of the apartheid era bureaucrats on the policy and bureaucratic processes are illustrated by the following two examples. Firstly, they provided the framework, via the work done in the Education Coordination Services before 1994, for the provincialisation of the education system (Kruss: 1997). Secondly, the bureaucrats in the Curriculum Services department brought very important discursive influences into the policy processes such as the CUMSA which informed the school curriculum policy (see 5.4.2.1) and the National Training Strategy Initiative that played a prominent role in shaping the NQF (see 4.5.4). Through their influence on the structure and outcome of the policy processes the apartheid-era bureaucrats played a very important role in determining education policy and on placing limitations on the structure and functioning of the bureaucracy. Attempts were made by the Ministry to break the conservative bureaucratic culture. The RDP COLP programme which targeted the physical refurbishment of schools was an unsuccessful attempt to reorientate the bureaucracy's financial and administrative functioning to be more responsive to the need for a redistributive orientation in educational delivery (see para 6.4.4).

The reconstitution of civil society during the 1990s had a decisive impact on the education policy environment. The people-state dichotomy, in terms of which the progressive education movement galvanised popular resistance against apartheid education, was replaced by the need to develop policy in anticipation of governance. In the process the substance of the radical People's Education discourse was marginalised. The closure of the NECC in 1995 represents the collapse of a vibrant civic culture in education. Some prominent NECC activists became bureaucrats in the DoE and organisations such as SADTU and COSAS were co-opted into promoting state policy. This had the effect of neutralising the capacity of the left to sustain a critique of education policy that came to resemble a narrowing orientation. In the vacuum created by the dispersal of leftist activists and organisations, a constellation of conservative interests, motivated by the need to protect their privileged status, and spurred on by the mainstream media, began to have an impact on the policy process. Consequently, the period between the 1994 election and mid-1997 was characterised by the emergence of conservative groups who used the leverage that the moderate constitutional dispensation provided to push for the retention of educational privilege (see para 4.6.2). This placed constraints on the government to legislate for a new path in educational reconstruction.

The establishment of the NETF in 1993, in attempting to deal with the intermittent short-term crises that beset education in the early 1990s, gave rise to stakeholder politics in education policy making. Only identified constituencies could be represented in the policy process. This excluded many interest groups, academics, curriculum and policy experts and the majority of teachers. As I argued in Chapter Five, the curriculum policy process, driven by stakeholder participation, with little consultation by teacher organisations with teachers, served to alienate teachers from the new curriculum. The curriculum process was criticised as having been produced in 'smoke-filled' committee rooms without any connection to the learning context. The policy making model was technicist in that the process was divorced from the exigencies that had existed at the level of implementation.

The conceptual underpinnings of the NQF were generated by business and labour who agreed on the need to make education and training more responsive to labour requirements. The education sector was almost completely ignored in the process. OBE was determined as the school curriculum framework outside of the school curriculum process. The intensive work done by stakeholder representatives in the curriculum policy processes between late 1996 and early 1997 amounted to an elaboration and ratification of the OBE approach which was determined outside of the curriculum process. Paradoxically, an influential schooling interest group such as SADTU agreed to this predetermined agenda because of its political support for the integration of education and training, even when it became clear that the new curriculum would have negative consequences for teachers. Policy borrowing from countries like Australia, New Zealand, Canada and Scotland informed the conceptualisation of the NQF and OBE. It is therefore clear that education policy narrowing was the outcome of a number of influences, mainly conservative, that operated in the political conjuncture of the 1990s and which sidelined a transformative view of education.

With regard to the main conceptual underpinning of this thesis, I am of the view that education policy during May 1994 and mid-1997 favoured the development and economic growth conceptual dimension. Equality is regarded as contingent on the 'social dividend' gained from a growing economy. Put in another way, the post apartheid government developed a policy vision that aimed at contributing to the reconstitution of the terrain of social reproduction that would facilitate accumulation in a global capitalist environment. A constricted policy environment became the dominant feature in terms of which the government's commitment to the provision of social welfare including education weakened. In this light, the government will find it increasingly difficult to provide minimally acceptable living conditions for an expectant citizenry. A vision of a just and equitable education system is thus compromised. Where the government cannot sustain its legitimacy because of its inability to deliver the necessary conditions for a reconstructed education system, education policy is used symbolically to regain its legitimacy. Following Weiler (1990) and Fuller (1991), I showed that education policy was used by the government as a means of compensatory legitimation. The government symbolically used policy to signal progress and a commitment to transformation (as opposed to effecting real change). This was illustrated in its school access and school curriculum policies. The government used the COLP and Curriculum 2005 to attempt to reestablish legitimacy. The appropriation of People's Education concepts to cloud an essentially technicist curriculum framework, was an attempt to present policy at the symbolic level as tied to a vision of transformation in education. The COLP amounted to an endeavour to signal the government's commitment to fundamental change. However, the use of policy at the symbolic level served only to mask patterns of educational inequality which already began to manifest along old and new lines in the post apartheid period.

Given the pattern of policy conservatism that has been established in the first few years of the post apartheid period, the question for progressive education praxis arises as to the manner in which an alternative policy orientation should be conceptualised. This task essentially involves the reinsertion of the principle of equality into public policy in such a manner that a complementary development path based on keeping equality and development in tension can be achieved. Currently, the sidelining of equality is having negative consequences for social redress. A starting point is to appreciate the particular character of the 1994 - 1997 policy settlement in order to ascertain the 'limits of possibility' in terms of which policy has to be generated. A 'sociology of possibility' (see para 2.2), i.e. where a policy basis is understood as the outcome of converging global and national political and economic parameters, has to inform our understanding of what is achievable under the current circumstances, while keeping the demands by the majority of people for fundamental change firmly in sight. Tempering entitlement and heightened expectation may be a necessary consequence, but a more fundamental outcome would be to view policy more pragmatically in modest and realistic terms. This is consonant with Bowles's observation about the South African education context that "modesty ... is not a prescription for quiescence or lowering expectations, it is only to recognise the way in which structures of domination may defeat progressive educational objectives" (1993: 36).

The current political climate provides space for launching a coherent challenge, on both the political and academic terrain, in destabilising the prevailing conjunctural settlement. The period between 1994 and 1997 represents an unstable truce between social forces which defined a historically specific relationship between state and civil society (Smyth 1995) in terms of which the current policy orientation was achieved. The conflict that did occur in this period was subjected to the imperative of putting in place a functional policy environment, which drew leftist individuals and groups into the government's agenda for social reconstruction. While my analysis showed that right-wing interest groups have been active in manipulating this 'truce', their political objectives became prominent on the back of global and national circumstances that have operated to circumscribe the policy process. The government's macroeconomic and education policy choices have had to be made in response to the complex apartheid legacy of educational development on the one hand, and the economically constraining impact of global dynamics on the other. Policy narrowing, I contend, has occurred as a result of weak policy decisions by the government whose desire to create conditions for South Africa's entry into the global capitalist economy left it with very few policy options. The contradictions of these policies have now become visible especially in the light of the end of 'reconciliation politics' as symbolised by the persona of former President Nelson Mandela who has retired from political office. One could argue that 'real politik' in South Africa has only just started where the limitations of policy positions are not obfuscated by the 'need' for there to be a social reconstruction consensus. Recent criticism from the left of the political spectrum, mainly against negative policy outcomes in practice such as Curriculum 2005, the COLP programme, and the school funding formula, has been highlighting fundamental questions about the efficacy of current education policy in meeting the objectives of social reconstruction. This, I believe, potentially holds the seeds of a more robust debate and contestation which could set new political boundaries for policy making. The extent to which an emerging new settlement would favour the reinsertion of equality into education policy and thereby establish a complementary development path will partly depend on the ability of leftist social movements to organise themselves around and advance pragmatic policy objectives in attempting to destabilise the current policy settlement.

A different education policy approach has to be founded on a viable alternative to the current macroeconomic framework. My analysis of education policy has confirmed the truism that economic policy sets delimitations for other areas of public policy. GEAR's stringent fiscal approach has led to financial austerity which has impacted on the government's capacity to provide social welfare and other public services. Instead of an expanded budget to fund increasing demand in social consumption, the result of incorporating the black majority as political equals into the democratic polity, the government's financial policy resembles the smaller state approach found in many other developing countries. Despite heroic attempts by ministries who deal with social service provision such as health and social welfare, and those who concentrate on infrastructural provision in areas such as water, electricity and housing to expand basic services, their work has been hampered by limited budgets. As I have mentioned earlier, in education limited finances have led to measures that target formal equity but which are devoid of effective redress strategies.

A necessary condition for social reconstruction is to increase social consumption spending which I believe is dependent upon a more flexible monetary strategy. Economists have, for example, pointed out that South Africa's approach, in comparison to other OECD countries, to reducing the fiscal deficit to an arbitrary figure of 3 percent is much too stringent for a developing country (Marais 1998: 163-166). Too great a percentage of the overall budget goes to servicing the debt which diminishes funds available for social spending. Even World Bank economists allowed for a less stringent approach to fiscal deficit reduction, as long as it is integral to a growth pattern (see World Bank 1993: 5). Padayachee notes that there is enough room for manouevre in fiscal policy elements such as taxation, and inflation, growth and investment targets to derive a financial and budgetary approach that would make more money available for social spending (Padayachee 1995: 131). The point I want to make is that enough space exists for a debate in economic policy circles about the most appropriate economic approach to developing a flexible fiscal strategy that would enable an increase in social consumption spending. This is not to suggest that such an approach would either lead to huge increases in social services provision, or be a panacea for the eradication of social inequality. On the contrary, while it would be expected that a flexible fiscal approach would provide more money for social spending, it is clear that in the current global economic climate the increase would not be much greater than current levels. South Africa, as other countries at the same level of development, does not have much room for manouevre in determining financial policy.

While a new financial approach would not lead to a marked increase in funding, the extra money could nevertheless contribute in laying a bedrock for greater equity and redress which current funding levels have impeded. Instead of equity without redress, a long term development path at community level could be stimulated that would involve community participation, local industries, and human resource capacity building. Strategic funding of sustainable development and capacity building projects that would lead to state - community partnerships, without having to establish inefficient bureaucracies, could be put in place. The idea that communities are responsible for their own development would be promoted. Without financial stimulation this kind of development would be difficult to put on track. Greater financial investment in stimulating community participation in development would not just 'signal' the government's commitment to alleviating conditions of poverty, but would place communities in a favourable position to embark on actual social improvement.

Two issues are central to an approach for effecting greater equity and redress in education. Firstly, a basis for prioritising certain aspects of education over others has to be put in place by identifying those areas that have greatest need. For example, schools in black townships and rural areas have the most impoverished conditions according to all the indices of the School Needs Survey (see para 6.3). Redress strategies would thus have to prioritise schools in these areas, as opposed to former white schools in urban centres. The latter schools have displayed a remarkable ability in developing their own 'redress' strategies, ranging from user fees to corporate funding and investment. A case could be made for these schools to share their resources with poor schools in mutually enriching partnerships that could involve exchange of teacher expertise, sharing of learning resources, use of sport and extra-curricular facilities, and passing on financial and managerial know-how. As essentially public institutions established on the basis of racial differentiation under apartheid, a way has to be found for these schools to play a bigger role in augmenting the resource-poor environments of black schools. However, this strategy has obvious limitations. It would be difficult, if not constitutionally impossible, to legislate for this kind of partnership. This strategy would thus mostly depend on the volition and goodwill of former white schools. Also, the strategy could not be universally applied because there are too few former white schools to establish partnerships with the large number of the black schools. Large geographic distances between these schools are another constraining factor.

It is therefore clear that black township and rural schools will depend on government intervention to improve their school conditions. The COLP amounted to a once-off intervention under the now abandoned RDP to improve the physical conditions but has failed to lay a material basis for the generation of a learning culture in schools. Schools in townships remain impoverished without basic resources such as textbooks, desks and electricity. The question as to the basis for redress funding for these schools is therefore an urgent one. A redress tax has been proposed that would see the user fee income of those schools who charge more than a thousand rand per capita taxed by twenty percent (see Sayed 1997). This money would then be redistributed to poorer schools. This measure has been deemed as unpopular by an already overtaxed middle class's objection to having their tax burden increased. A second measure is based on applying different funding norms to different schools without increasing the education budget. Differential funding would be implemented in terms of which the poorest schools would receive the largest proportion of money and the richest schools the least. While this measure is worth considering, despite protestations from parents that it too amounts to indirect taxation, calculations have shown that a viable implementation of the measure would not redirect enough funding to implement redress mechanisms in poor schools (DoEh 1995: 12-13). Clearly, what is required is an expansion in the educational budget in terms of which a higher funding norm would be applied to impoverished schools. An increase in the education budget is justified on the basis of the dictum that redress needs money. As I have indicated above, a more flexible financial policy approach would result in an increase in social consumption spending of which educational funding would be a beneficiary. While the level of funding would not lead to a sea change in the conditions of schooling in poor communities, it could establish a sound basis for a sustainable community participatory approach to improving conditions in these schools. The extra money should be made available on the basis of targeted funding and a sustainable development strategy by school communities that conforms to strict measurable development criteria. Redress funding should be regarded as an inspirer of broader school development as opposed to a cure all for the problems, whether material or behavioural, that currently face township schools.

The second principled issue of a redress orientation relates to the pace of educational development which would have to be determined by the pace of the overall development of society. Generally, this means that an equitable education system would be generated over a longer term period than what has been popularly envisaged. A fundamental criterion of such development has to be that social change and educational improvement be visible to communities. The economic rationale for conceptualising development over a longer period is the availability of financial resources and development capacity to ameliorate the enormity and complexity of the backlogs in educational provision. Educational development has to be a key part of a long term overall socioeconomic development strategy.

An educational rationale for slower and more sustainable implementation of change is based on the wisdom that teachers, schools and educational bureaucracies take a very long time to adapt their functioning to a new orientation. The inefficacy of Curriculum 2005 is in part the result of the policy makers' inability to factor into their curriculum planning the capacity of teachers to give effect to the required new pedagogy. Teacher identities are constituted and reinforced over a long period of time. The shift to a new pedagogy and thus teacher identity, if at all desirable, has to be conceptualised and supported over a long period. The Education Ministry's unwillingness to institutionalise teacher development, and instead to have information workshops on the new curriculum, points to a lack of understanding of teachers' capacity to implement the curriculum as much as it shows the Ministry's political motivations for having a new curriculum Similarly, a slower and more sustainable pace of change has to be followed in areas such as institutional reorientation, the development of new textbooks and learning resources, and managerial capacity. A fundamental priority, even a precondition, for any policy change and innovation is to establish conditions of stability and orderly routines in schools where the learning culture is dysfunctional.

With regard to achieving a balance between equity and development in overall education policy, the current emphasis on development is clearly untenable. The NQF and Curriculum 2005 will neither provide a viable basis for a reconstructed education and training system, nor produce a critical mass of highly skilled people to enhance South Africa's productive capacity. Its instrumentalist orientation has to be counter-balanced by a more open-ended and flexible pedagogy. A starting point would be to recognise the pedagogical differences between education and training. This is not to suggest that the two sites of learning cannot find a level of articulation that would allow for the establishment of a unified and coherent education and training system. A more flexible domain-specific approach to pedagogy and assessment has to replace the NQF's preference for a homogenous approach to learning which occludes the pedagogical differences in different sites of learning. The specific learning approach would have to be determined by teachers and trainers in their different learning contexts. The restrictive approach to outcomes in Curriculum 2005 would have to be dropped in favour of a more open-ended pedagogical orientation that balances elements of measurability with experimentation and creative learning. The education and training system's need to produce employable persons with high skill levels has to be counter-balanced by the requirement of generating democratic citizens capable of making informed choices about their quality of life. This latter dimension is undermined by the current emphasis on producing skilled workers. Placing the education system on a long-term development footing based on a creative balance between equality and development is an urgent task if South Africa is to make good on the educational aspirations of its people.

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INTERVIEWS

1. Ms J. Leno; World Bank education specialist and representative in Southern Africa - 5/10/1996
2. Mr M. Gallie; South African Democratic Teachers Union official - 27/6/1998
3. Ms J. Bam; participant on the Reference Committee that advised the Technical Committee who produced the Draft Curriculum 2005 in March 1997 - 10/8/1998
4. Mr M. Gallie; South African Democratic Teachers Union official - 12/8/1998
5. Dr. N. Faasen; former Head; Curriculum Services, Western Cape Education Department - 13/8/1998
6. Dr. H. Lotz; participant in the Learning Area Committee, Human and Social Studies, lecturer, Education Department, Rhodes University - 18/8/1998
7. Dr. G. Niebuhr; Former Head Curriculum Services, National Education Department - 19/8/1998
8. Mr M. Russell; Consultant to Via Afrika publishers (produced curriculum material related to the Curriculum 2005) - 19/8/1998
9. Dr. W.E. Botha, Former Deputy Director, Curriculum Services, National Education Department - 20/8/1998
10. Anonymous bureaucrat in the National Curriculum Services Department - 2/9/98