

**A critical analysis of problem representations in basic education  
policy in the democratic South Africa**

by  
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## **Declaration**

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## English abstract

The thesis critically analyses problem representations identified within basic education policy documents, dated between 1995 and 2015. These policy documents are identified in the thesis as: the *White Paper on Education and Training of 1995*, the *Plan of Action: Improving access to free and quality basic education for all*, and lastly, the *Action Plan to 2019: Towards the realisation of schooling 2030*. Problem representations, in the thesis, refer to the explicit and implicit representations of problems, as termed by Bacchi (1999). Bacchi's (2009) "What's the problem represented to be?" (WPR) approach is the foundation and the analytical tool utilised within the thesis, and is set apart from conventional forms of policy analysis. Part of its unconventional approach to policy analysis is its post-structuralism philosophy, which also underpins the direction of this thesis.

The thesis considers global trends in approaching policy analyses, and then focuses more on the South African context. An in-depth analysis of literature reveals dominant themes and approaches in education policy analysis in South Africa, which also indicates that the WPR approach has never before been applied to education policy in South Africa. The WPR approach in the thesis is the analytical tool that is applied, and it supports the qualitative approach undertaken in the research.

The explicit and implicit representation of problems reveal patterns that are observed across all three policy documents, namely; the provision of physical infrastructure, compulsory and free educations, management of the system and learner performance, early childhood development, teacher training and job satisfaction, and finally, the legacy of the past and inequality. Identification of problem representations and the application of the WPR approach show the underlying assumptions made by policy documents that are embedded within the explicit and implicit representations of problems. These assumptions bring about different meanings and interpretations of what is classified as the 'problem'. The thesis emphasises the legacy of apartheid within the education system, and concludes that the democratic system expects learners who were previously disadvantaged – through the system of apartheid – and who are disadvantaged now – through socio-economic inequalities – to achieve the same learner performance outcomes as those who do not experience disadvantages in any of these forms.

## Afrikaanse abstrak

Die proefskrif ontleed kritiese probleemvoorstellings wat in die beleidsdokumente van onderwys geïdentifiseer is, wat tussen 1995 en 2015 gedateer is. Hierdie beleidsdokumente word in die proefskrif geïdentifiseer as die *Witskrif oor Onderwys en Opleiding van 1995, die Plan van Aksie: Verbetering van toegang tot gratis en kwaliteit basiese onderwys vir almal en ten slotte die Aksieplan tot 2019: na die besef van onderwys 2030*. Probleemvoorstellings is die eksplisiete en implisiete voorstellings van probleme soos genoem deur Bacchi (1999). Bacchi (2009) se "Wat is die probleem wat voorgestel word?" (WPR) benadering is die grondslag en die analitiese instrument wat binne die proefskrif gebruik word, en word afgesonder van konvensionele vorms van beleidsanalise. Deel van die onkonvensionele benadering tot beleid analise is die poststrukturelisme-filosofie, wat ook die rigting van hierdie proefskrif ondersteun.

Die proefskrif oorweeg globale neigings in die benadering van beleidsontledings en vernou dit tot die Suid-Afrikaanse konteks. 'n In-diepte analise van literatuur toon dominante temas en benaderings in onderwysbeleidsanalise in Suid-Afrika aan, wat ook aandui dat die WPR-benadering nog nooit van toepassing is op onderwysbeleid in Suid-Afrika nie. Die WPR-benadering in die proefskrif is die analitiese instrument wat toegepas word en ondersteun die kwalitatiewe benadering wat in die navorsing onderneem word.

Die eksplisiete en implisiete voorstelling van probleme toon patrone wat in al drie beleidsdokumente waargeneem word, naamlik; die voorsiening van fisiese infrastruktuur, verpligte en gratis opvoeding, bestuur van die stelsel en leerderprestasie, vroeë kinderontwikkeling, onderwyseropleiding en werkstevredenheid, en laastens die nalatenskap van die verlede en ongelykheid. Identifisering van probleemvoorstellings en die toepassing van die WPR-benadering toon die onderliggende aannames wat gemaak word deur beleidsdokumente wat ingebed is in die eksplisiete en implisiete voorstellings van probleme. Hierdie aannames bring verskillende betekenis en interpretasies van wat as die 'probleem' geklassifiseer word. Die proefskrif beklemtoon die nalatenskap van apartheid binne die onderwysstelsel en kom tot die gevolgtrekking dat die demokratiese stelsel van leerders verwag, wat voorheen benadeel is deur die stelsel van apartheid en wat nou benadeel word deur sosio-ekonomiese ongelykhede, om dieselfde leerderprestasie-uitkomst te bereik as diegene wat nie nadele ervaar in enige van hierdie vorms nie.

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## List of abbreviations and acronyms

ANA	Annual National Assessment
ANC	African National Congress
ASIDI	Accelerated Schools Infrastructure Delivery Initiative
COSATU	Congress of South African Trade Unions
C2005	Curriculum 2005
CUMSA	New Curriculum Model for South Africa
DBE	Department of Basic Education
DHE	Department of Higher Education
DoE	Department of Education
ECD	Early Childhood Development
EMIS	Education Management Information System
ERS	Education Renewal Strategy
FFC	Financial and Fiscal Commission
GNU	Government of National Unity
HRD	Human Resource Development
MDG	Millennium Development Goals
NEPI	National Education Policy Investigation
NECC	National Education Crisis Committee
NDP	National Development Plan
NP	National Party
NPNC	Non-Personnel Non-Capital Inputs
NQF	National Qualifications Framework
NTB	National Training Board
OBE	Outcomes-Based Education
PED	Provincial Education Department
PIRLS	Progress in International Reading Literacy Study
PRISEC	Private Sector Education Council
RDP	Reconstruction and Development Programme
RNCS	Revised National Curriculum Statement
SAQA	South African Qualifications Authority
SACMEQ	Southern and Eastern Africa Consortium for Monitoring Educational Quality
SGBs	School Governing Bodies
WHO	World Health Organisation
WPR	“What’s the problem represented to be?” approach

## **Chapter 1: Introduction**

### **1.1. Establishing the foundation**

As individuals we all have both innate and taught processes of how we approach life. These processes are essential to our problem-solving abilities, but most importantly, they determine the way in which we perceive and deal with issues. In other words, one issue can illicit different experiences, and viewpoints of how it should be dealt with. This is true for all areas of life and for all individuals, including those who govern and make rules.

Bacchi (1999:1) explains that when comparing two viewpoints to an issue, one would see that each has its own consequences. Considering this, Bacchi (1999:1) emphasises that how we perceive an issue determines what we would do about it; the result is different solutions to the same issue. This leads the way for competing interests of how one issue should be solved, and eventually one view becomes dominant over all. This is relevant to the process of public policy. As one will observe throughout the thesis, there are views about policy issues that are dominant, and can limit not only how issues are viewed, but also what solutions will be put in place.

### **1.2. Approaches to public policy analysis: Global trends**

Most of South African policy analyses, like many international policy trends, are critical or evaluative in approach. Each with their advantages, such as theory-based analyses that focus on the gap between “actual input and the expected output of a programme” (Stame, 2004:58), are analyses that have been exhausted. In other words, while they can provide new insights, they would not challenge the conventional forms of analyses, in the South African context. It can also be noted that internationally, as well as in South Africa, policy analyses have mostly occurred in the form of commentary or critique, and have not added any empirical value to education policy research (Ball, 1990:9). While there has been an increase in critical analyses, there is much more literature that deals with analyses as evaluations and implementation (Taylor, 1997:23). Taylor (1997:23) explains “It would appear that methodological questions about what 'data' are needed for analysis and how that material is collected have been less important in critical policy work than the theoretical frameworks which are used and the questions which are asked”. This relates to the South African

education policy context in that policy analysis post-apartheid has been critical in approach but has lacked the necessary “methodological questions” that would control how the data is collected. It has also become clear that theoretical frameworks are more important to researchers and analysts, than methodological approaches.

According to Ball (1990:7), this attitude has created a sense of meaninglessness and complexity where language and conceptualisation are taken for granted. Ball (1990:8) states that in education policy (in Britain) “the conceptual tools seem blunt and irrelevant”. It is therefore clear that there seems to be a global trend of a sense of convenience for analysts when considering theoretical approaches to an analysis. Relating to the above, neglecting to consider methodological approaches to policy analysis has led to dominance in the consideration of theoretical frameworks when it comes to analysing policy. While it is not true for all analysts, as the above authors indicate, it seems to be a general trend in the policy analysis field. Codd (1988:235) explains that there is a widely accepted view that analysis is “a multidisciplinary field that cuts across existing specialisations to employ whatever theoretical or methodological approach is most relevant to the issue or problem under investigation”. This emphasises that analysis is specific, and that analysts cannot be unconcerned about the type of theoretical framework and methodology employed.

For Howlett, Ramesh and Perl (2009:20) there is no set way of analysing public policy that is recognised or similar on a global scale. Instead, Howlett *et al.* (2009:20) believe that there are certain techniques and skills that policy analysts require. Policy analysts apply analytical tools, that are suitable under certain conditions, to understanding policy problems (Howlett, Ramesh & Perl, 2009:20). There is no “one size fits all” when it comes to approaches to analysing policy problems, but governments have their selected preferences to the types of approaches applied (Howlett *et al.*, 2009:21). Howlett *et al.* (2009:21) describe how “the vast majority of formal analyses rely on ideas and techniques drawn from economics”. Policy analysts that ascribe to economic approaches are known by their critics as “positivist” or “rationalist” (Howlett *et al.*, 2009:21). According to Howlett *et al.* (2009:21), “positivist approaches to studying policy embrace scientific rationality and see policy analysis as part of the quest to uncover objective knowledge”. In opposition to positivist approaches to quantified research, “post-positivist” approaches arose. Post-positivists rely on “political and social analysis of public problems and policy making processes and outcomes” (Howlett *et*

*al.*, 2009:21). With all of the above stated approaches, the thesis will emphasise the careful selection of the research methodology and the analytical tool chosen.

### **1.3. An overview: Apartheid education and the transition to democratic education**

The education system was completely abolished in South Africa in 1994 after the election of the democratic government, known at the time as the Government of National Unity (GNU), led by Nelson Mandela's African National Congress (ANC). South Africa's education history is characterised by racial segregation and great socio-economic inequalities. In 1953 Bantu Education was instituted for all black learners, and signified the apartheid state's full control over black education (Reviews of National Policies for Education, 2009:37). White learners received education of great quality, and the apartheid government aimed most of its resources at white education development. In other words, where the apartheid government would spend R100 on black learners, there would be a value of R900 spent on white learners, setting the stage for socio-economic inequalities according to race.

Education under the apartheid system was characterised by racial discrimination and segregation. This meant that the white minority received education of supreme quality, as previously mentioned, while the black and coloured majority received education that was limited in potential. The education system functioned through "nineteen racially and ethnically divided departments" (Sayed & Kanjee, 2013:7). Of the 19 departments, 11 departments were managed for the black population: six were in self-governing territories, four were in so-called independent states (Bantustans), and one department for education administered to Africans who were living in white-only areas (Sayed & Kanjee, 2013:7). According to Sayed and Kanjee (2013:7) "there were three separate services of tricameral parliament for 'Indians, 'coloureds' and 'whites', which were organized into four semi-independent provincial departments". The Department of Education was responsible for setting the norms and standards within the education system, as well as regulating policy and allocating budgets (Sayed & Kanjee, 2013:7).

Keeping in mind the history of education under apartheid, De Clerq (2006:135) explains that the ANC faced serious challenges when it came to developing policies that were strategic in intervention and action. This included a massive shift in power towards those who were historically excluded from all major policy decisions, but this did not come without structural

constraints (De Clerq, 2006:135). Education policy was one of the most difficult areas where change had to be instituted, since it played an extremely central role in “providing upward social and economic mobility and involves so many interactions and mediation” (De Clerq, 2006:135). This was a clear indication of the expectation of what education was set to achieve. It was also the reason for the government’s choice of Outcomes-Based Education (OBE) (De Clerq, 2006:135).

International boycotts resulted in the weakening of the apartheid state’s economy, while black learners increased their involvement in the resistance; the apartheid state’s education system began to collapse (Reviews of National Policies for Education, 2009:37). This resistance came in the form of protests and uprising, which often resulted in violent conflict between apartheid state police forces and black learners. An example would be the Soweto uprisings on 16 June 1976 (today known as Youth Day), where learners and parents had violent clashes with apartheid state police, as they were protesting against “the role of Afrikaner nationalist ideology” and the Afrikaans language as the main medium in schools (Ndlovu, 2006:318). The day resulted in several casualties; the most well-known of these being Hector Pieterse, whose lifeless body, carried by a fellow learner, was photographed, and serves as a visual reminder of the student struggle under the apartheid regime (Ndlovu, 2006:357).

Pressure had been put on the education system since the early 1990s and this system was therefore predestined to be one of the key role players for transformation. Not only was it to grant access to quality education for all South Africans and instil new values within society, but it also had to carry the burden to serve as the new government’s example of its commitment to transformation (Fataar, 2010:1). South Africa’s history of education under the apartheid government largely affected how policy transformation took place, once the transition to a democratic government was on the horizon. In April 1994, when the first democratic elections were held, the Government of National Unity (GNU) had to relinquish the complex and radicalised education system of apartheid, and had to transform the education system in a way that would lead the democratic transition. The new democratic government was set with the task of reorganising and transformation the education system, and manage the destruction of the legacy of Bantu Education (Reviews of National Policies for Education, 2009:37). Within the new system of education, the government unified all education departments under one national system and nine provincial sub-systems (Reviews

of National Policies for Education, 2009:37) (Republic of South Africa 1995, 2). This included the creation of new management systems (outcomes-based education) and transforming the curriculum in a way that would have no resemblance to the apartheid system.

Public policy post-1994 was focused on “nation building”, which became a distinct part of all social policies (Gumede, 2008:8). Gumede (2008:8) suggests that policies post-1994 were nationalistic in approach, concentrating especially on economic growth, mostly for the previously disadvantaged black majority. Much of the policy developed during the democratic dispensation drew from ruling-ANC’s agenda (Gumede, 2008:8). This led to a significant concentration on developing human capabilities (human resource development) by providing more opportunities and choices to society (Gumede, 2008:9). The education system became one of the main drivers of initiatives for human resource development. Gumede (2008:10) explains that the “journey of transformation can be described as a trajectory of redress, nation building, reconstruction, redistribution and growth, and indeed a holistic integrated process in which political and economic forces interact in dynamic and diverse ways to improve the living standards of the people”.

Most of South Africa’s social policies have been aimed at addressing challenges of poverty and underdevelopment while building national unity (Gumede, 2008:16). However, Gumede (2008:16) believes that social public policy making has almost always been influenced by a pledge to the “national democratic revolution”, to which the ruling party and its respective alliances subscribe. This pledge is met with “trade-offs” being made, continuously favouring and prioritising human development for economic growth (Gumede, 2008:16). Furthermore, Gumede (2008:20) suggests that “the public policies that are being pursued and the manner in which this is being done... is an attempt to mediate the neo-classical economic thinking”. Gumede’s (2008) analysis sums up the conditions of social policies at the beginning of democracy.

The responsibility of the new education system is outlined within the Bill of Rights in the 1996 Constitution. In Chapter 2 section 29 (1) it states that “everyone has the right – (a) to a basic education, including adult basic education; and (b) to further education, which the state, through reasonable measure, must make progressively available and accessible”. The *White Paper* explicitly states in Chapter 4 its values and principles where education is identified as

a basic human right. According to the *White Paper on Education and Training, 1995*, “the over-arching goal of policy must be to enable all individuals to value, have access to, and succeed in lifelong education and training of good quality”. It also states that in relation to the constitution, equal access to basic education for all is guaranteed (Republic of South Africa 1995, 1).

The Democratic South Africa’s Education and Training policy (specifically the *White Paper on Education and Training, 1995*), demonstrates its reform of the past system to include all learners within both the learning process and environment. It places emphasis on learning taking place without the fear of being discriminated against based on race, gender, or socio-economic background. While the policy seems ambitious on the surface, it calls for needed and drastic transformation, and the improvement of a system that had, up to that point, favoured good and quality education only for the white minority.

After the publication of the first Education and Training White Paper (Republic of South Africa 1995, 3), it was clear that the GNU’s approach would be to integrate the education system under one ministry. According to the *White Paper on Education and Training, 1995*, “an integrated approach to education and training will increase access, mobility and quality in the national learning system” (Republic of South Africa 1995, 3). It was only in 2009 that the Department separated into two departments, the Department of Basic Education (DBE) and the Department of Higher Education (DHE). Within this thesis, the researcher will refer to the DBE as it is known today, rather than to continuously distinguish between the different departments, as previously explained.

#### **1.4. Approaches to policy analysis within the literature reviewed**

Education policy research in South Africa is plentiful and vibrant. Evidence produced by Deacon, Osman and Buchler (2010:95), suggests that most of the education policy research in South Africa was published between 1995 and 2008. A study by Deacon, Osman and Buchler (2010:95) showed that between the periods of 1995 to 2006 the research database on education policy had 10,315 entries. Deacon *et al.* (2010:95) drew a sample of 600 texts from the database to determine the themes in education policy research. They identified seven primary themes: policy idealism, policy critiques, language in education policy, the nature and effects of educational decentralisation, Further Education and Training policy, higher

education policy, and finally, education policy and the market (Deacon, Osman & Buchler, 2010:99).

Policy analysts and academics have taken various approaches to analysing and critiquing education policies. Many, such as Cross, Mungadi and Routhani (2002), Young and Kraak (2001), and Jansen (1998), critically analysed curriculum reform. Muller (2001) looked at the philosophies that motivated education reform during the transition period. Muller (2001:59) found that in the context of South Africa, the new dispensation was influenced by education policy philosophies from around the world, specifically the United Kingdom (UK), the United States of America (USA), Australia and New Zealand, who were all moving towards progressivism. This too, mostly through OBE on initiatives, influenced South African education policy (Muller, 2001:59).

Along with curriculum reform, Young (2001:19) also considers theoretical and philosophical influences over education policy in South Africa, and with this he looks into 'policy borrowing'. Other approaches include Jansen's (2001:41; 2002) description of education policy as a political symbol for transformation, where he (Jansen, 2001:42) intended to show that education policies were in an essence used by the ANC government to establish its policy position, bringing in the consideration of power relations involved in policy structuring. Christie (1997) investigated the influence of global trends on the local context. More specifically, she compared Australia's competence-based policies to South Africa's OBE. In some instances, this also aligns with the 'policy borrowing' narrative (Christie, 1997).

Sayed (1999:141) argued against the decentralisation of the South African Education system, as he cautioned that decentralisation can lead to greater inequalities. Sayed, along with Kanjee and Nkomo (2013), examined interventions that would contribute to the quality of education, critically analysing policies that dealt with quality education. Along with many international authors and education policy analysts, Sayed, Kanjee and Nkomo (2013:xv) believe that it is the quality of education that has long-term effects, and not just simply granting all learners access to education.

The analysis of the literature revealed two constant contexts within which education policy in South Africa has been constructed, namely regime change and socio-economic inequality. The contexts, although not always explicitly mentioned by authors within the literature, were

a product of the researcher's own analysis of the literature. These two contexts, with regards to this thesis, are important in understanding how education policy has been shaped in South Africa, post-apartheid. In order for the education system to take on its role in the transformation of society (enabling citizens to take part in the economy, and providing all South Africans with equal opportunity through accessing education), these contexts set the stage for what takes priority within the public policy arena, and therefore education policy.

Approaches undertaken by policy analysts in South Africa have been wide in variety. A good example would be the categorisation of policy analysts as described by De Clerq (2010). De Clerq (2010:93) divides education policy analysts in South Africa into four groups. The first two groups are described as focusing on content within education policies, where the first group exposes these policies for being ambitious and symbolic in their content, and the second group provides descriptions as to why the policy content is contradictory (De Clerq, 2010:93). The third group focuses on "how education policies are translated and operationalized by studying the implementation context and processes and identifying the causes for the gap between policy intentions and practices" (De Clerq, 2010:93). The last group, according to De Clerq (2010:93), investigates the policy change process in-depth. Discussed further in chapter two, the researcher's analysis of the literature reveals that policy analyses in education policy in South Africa, as presented by the dominant themes, has mostly been approached through the first three groups.

### **1.5. Themes identified within the literature**

The themes that have been identified by the researcher include: theoretical and philosophical underpinnings, curriculum reform, power relations, Outcomes-Based Education, access to quality education, inclusive education, and the role of teachers. Each of these themes represents the dominant foci discussed within the literature. Each theme will be expanded on in chapter two, however, below follows a brief overview of the discussion within each theme.

The theoretical and philosophical underpinnings are discussed in terms of the effects of international trends and circumstance (Young, 2001), the debates surrounding progressivism and its influence (Muller, 2001), neo-classical economics (Allias, 2012), and most predominantly, Human Capital Theory (Tan, 2014) (Christie, 1997), on South African education policy. All of the theories are considered to have influenced and shaped some part of education policy, and in return, the education system in democratic South Africa. The

literature discusses the effects of these theoretical and philosophical underpinnings and investigates their value in the South African context. Literature in this theme is predominantly of a critical nature.

Curriculum reform is the most-contested subject discussed after the transition. This theme goes hand-in-hand with the theme of power relations. Jansen (1998) and Fataar (1998), the most vocal within the literature on curriculum reform, are what De Clerq (2010) would classify as members of “the first group”, who critique education policy for being “ambitious and symbolic”. Contrary to this view of curriculum reform in South Africa, Chisholm’s (2005) personal experience as a participant in the curriculum reform process provides a reflection of circumstances that shaped curriculum policy. Power relations considers the key role players in shaping the entire education system. These power relations appear in the form of interest groups, government committees and non-profit organisations (Jansen, 2001) (Christie, 1997) (Chisholm, 2003), and to some extent, international role players. Power relations were key to ascertaining which viewpoints dominated the education policy agenda, and how these gained support. These themes contain literature that is predominantly critical and evaluative in approach.

The literature on Outcomes-Based Education (OBE) considers problems associated with its conceptualisation and its historical background and relevance to the South African context (Sayed & Kanjee, 2013) (Fiske & Ladd, 2004). It also reviews two contested views of OBE presented by Jansen (1999) and Chisholm (2004). OBE was chosen as a theme by the researcher for its controversy as a pedagogical choice for the South African education system, and also because there is a rich availability of literature on OBE as a policy that has been extensively critiqued in South Africa. Literature in this theme is largely critical, but also focuses on evaluation of implementation.

Access to quality education is mainly discussed in the literature in terms of the National Qualifications Framework (NQF), compulsory education, and ‘no fees’ schools. The literature also presents contested views on the clarification to what is implied by “access to quality”. Analysis of the literature reveals that the terms are mostly dealt with separately within the literature. The literature shows that “access” is defined in terms of South Africa’s commitment to achieving the Millennium Development Goals (MDG). This goal is stated as “Target 2.A”, and describes the achievement of enabling children globally to have access,

regardless of sex, to complete “a full course of primary schooling” by 2015 (United Nations, 2018). The literature shows that access has been achieved according to the Millennium Development Goal (MDG) criteria, while areas of quality have improved in terms of provision of learning materials and the improvement of the content of such learning materials (Spaull, 2013:21). Considering the barriers to accessing quality education, much of the literature offers a critique of policy proposals, and in some instances an evaluation of the outcome of implementation.

Inclusive education, largely discussed within the *White Paper 6* of education policy in South Africa, has been debated in terms of its conceptualisation. In South Africa, it has come to be defined as an education system that would include all learners regardless of their disabilities, poverty and cultural backgrounds (Republic of South Africa 2001, 10). Most of the literature in this area focuses on the implementation of policies in terms of schools becoming more inclusive.

The role of teachers is also considered a highly-disputed theme within the literature. Teachers are viewed as part of the policy process in many respects, and therefore their role as contributors to problems – or changing them – is regarded as essential. The literature reveals that there is a lack of clarity on the role of teachers, which has direct influence on the quality of teaching delivered, teacher job satisfaction, teacher identity, teacher training and education, and teacher accountability (Quan-Baffour & Arko-Achemfuor, 2014:5). Literature in this theme is predominantly critical, and focuses on implementation and evaluation of policy.

The review of literature is important for the researcher in that it establishes an understanding of which policy problems (given their prominence through the themes) have been analysed in the context of South Africa thus far. It therefore sets the scene for where gaps can be identified within education policy research, or in other words, areas of education policy analysis that are perhaps neglected. How education policy is analysed (the theoretical approaches and methodologies used) also contributes to identifying gaps within education policy research. More importantly, it was essential in the review, to establish that Bacchi’s (1999) WPR analytical approach had not yet been applied in the education policy field within the South African context.

## 1.6. Approaches undertaken in the thesis

The approach to this thesis, and how it differs from analyses indicated through the literature, is the application of Bacchi's (1999) WPR approach. The thesis will identify problem representations (how problems are represented in policy documents) by applying Bacchi's (1999) "What's the problem represented to be?" (WPR) approach. After identifying the problem representations, the researcher will critically analyse the representations of problems. The thesis will engage in new ways of analysing policy documents to enhance and elicit new or different meanings to problems. The aim therefore, is to identify and discuss the problem representations within selected education policies. This thesis will answer the question of 'What are the problem representations in Basic Education Policy in the democratic South Africa?'

The research question is based primarily on Bacchi's (1999) WPR analytical approach. Here it is appropriate to clarify that in the context of this analysis of Basic Education policy, a problem representation is described by Bacchi's (2009:xii) WPR approach. Bacchi (2009:xii) defines it as "the understanding of the 'problem' implied in any policy or rule" (this is further elaborated under point Chapter two). It therefore indicates that it will produce the problem representations within South African basic education policy. It blatantly asks which problems are being addressed by policies. It questions the way in which 'problems' are framed and therefore how solutions to said 'problems' are presented within policy documents. The research question, by means of the WPR approach (Bacchi, 1999:5), allows for "competing constructions of issues" to be considered. The research question, and therefore the identified problem representations, encourages reflection on the value of democratic education in transforming the education system from the previous apartheid education system.

Part of the objectives of the thesis are to establish the problem representations within the selected education policy documents, over a period of time (1995 until 2015). Furthermore, it aims to establish whether the problem representations change over the selected period of time between 1995 and 2015, which includes the clarification and conceptualisation of those problem representations. Data was mainly sourced through publicly available education policy documents. These documents include, the *White Paper on Education and Training of 1995*, the *Plan of Action: Improving access to free and quality basic education to all of 2003*, and the *Action Plan to 2019: Towards the realization of schooling 2030*. The problem

representations, extracted from these policy documents, are important in that they give analysts an idea of the logic of how the problems are perceived. Understanding this is vital to investigating the effects that these problem representations have. Bacchi (2009:1) emphasises that understanding problem representations are important to revealing what is being portrayed as problematic. The thesis therefore also explores an understanding of the issues that have informed education policy in a democratic South Africa.

Bacchi (2009:ix) explains that WPR allows one to consider the wider meaning of policy, “to understand how governing takes place, and with what implications for those so governed”. This suggests an examination of how order is maintained, and how we live within and abide by the rules that are set (Bacchi, 2009:ix). Policies can therefore be considered as government programmes for action (Bacchi, 2009:ix). Bearing in mind that policies imply that there is “a problem that needs fixing” and that something “needs to be changed”, WPR intervenes at this level of analysis, and problems that are implied or implicit become explicit through the WPR approach, and are scrutinised as such (Bacchi, 2009:x). The objectives of the thesis are therefore to identify the explicit and implicit (implied) problems within education policy, and to critically analyse these. To clarify, problem representations are the explicit and implicit meanings of problems that are found in policy proposals (Bacchi, 2009:x).

The research methodology is qualitative in its approach. As will be discussed further in chapter three, qualitative research as a choice of methodology is largely influenced by a researcher’s philosophy, which underpins the purpose of the research being done (Hammersley, 2013:21). In the instance of this thesis then, it is to be made clear that a qualitative approach was not chosen in opposition to quantitative approaches, but due to the philosophical approaches to the research question undertaken by the researcher. The philosophical approaches are identified as post-structuralism, and postmodernism. The importance of the researcher’s interpretation and understanding are emphasised through the identified philosophies (Duberley, Johnson & Cassell, 2012). Furthermore, post-structuralism is the underlying philosophy to Bacchi’s (2009) WPR approach.

Before applying Bacchi’s (2009) WPR approach, the researcher engaged in an initial form of document analysis. This is described by Bowen (2009:28), as “the analytical procedure” which “entails finding, selecting, appraising (making sense of), and synthesising data contained in documents”. This is also the foundation to Bacchi’s (1999) WPR approach. The

initial document analysis was done in order to establish which education policy documents were to be used for the application of the WPR approach. In this thesis, the “researcher is expected to draw upon multiple (at least two sources) of evidence; that is, to seek convergence and corroboration through the use of different data sources and methods” (Bowen, 2009:28). Document analysis is considered invaluable in this thesis due to its provision on insights regarding the background and context in which the documents (for example, Education White Papers) are published (Bowen, 2009:29).

The WPR approach, and its importance to this thesis, is that it is an analytical tool intended to facilitate critical interrogation, and thinking, of public policies (Bacchi, 1999:1). Bacchi (1999:1) emphasises that “What one proposes to do about something says a lot about what one views as problematic”. Simply put, if policies are stated solutions, then WPR allows analysts to determine what ‘problems’ are represented through these solutions. “The task in the WPR analysis is to read policies with an eye to discerning how the ‘problem’ is represented within them and to subject this problem representation to critical scrutiny” (Bacchi, 2012:21). Policies determine, on a governance level, what gets done and what does not.

Bacchi’s (1999:7) WPR approach places an emphasis on context “because ‘problems’ are often constituted differently due to location-specific, institution-specific and history-specific factors”, all of which set the context. Bacchi (1999:7) stresses that paying attention to the context allows for insight as to “why some versions of a ‘problem’ appear in one place and other versions appear elsewhere”. It also explains why an issue can be problematic in one setting but not in others (Bacchi, 1999:7). The context in the South African case, within which education policies are developed, can be described through regime change and socio-economic inequality (expanded on in chapter two). These contexts describe the circumstances under which democratic education policy came to exist in South Africa, and what the circumstances are now within education policy.

Part of Bacchi’s (1999) analytical tool is to answer six questions while analysing policies and problem representations. This thesis, however, is only focused on answering the first three questions, which deal with the analytical tool applied. The last three questions are for “reflecting on gaps and silences in designated problem representations” (Bacchi, 1999:12). The three questions that form the methodology are: “What’s the ‘problem’ represented to be

in a specific policy?”, “What presuppositions or assumptions underlie this representation of the ‘problem’?”, and “How has this representation of the ‘problem’ come about?” (Bacchi, 1999:2). The thesis only deals with these three questions because its aim is to identify the problem representations in basic education policy. The last three questions posed by the WPR approach are an in-depth analysis of the silences and effects of the problem representations.

## **1.7. Chapter Summary**

This chapter has provided a brief overview of the aim and intention of the thesis, as well as its direction. It has also discussed how the research question will be approached and answered. It has briefly explained the motivations in the choice of research methodology and the analytical tool.

Chapter two will discuss the literature reviewed, and the prominent themes identified through the analysis of the literature. This chapter will also discuss the contexts – regime change and socio-economic inequality – that are prominent in the literature, and the approaches and analytical tools identified in the literature that are commonly used to analyse education policy in South Africa. Chapter three will discuss the research methodology and analytical tool. It will emphasise the importance of a qualitative approach to this thesis and how the analytical tool, WPR, as described by Bacchi (1999), is used to analyse the selected policy documents. Chapter four will explain the findings of the analysis done through the WPR (Bacchi, 1999) approach. Finally, chapter five will conclude the thesis; it will reflect on the answers to the research question, and explain the value of the WPR analytical tool as a form of analysis for future research to be done.

## Chapter 2: Literature review

Education policy has always formally been associated within fields of economics, education studies, and sociology (McDonnell, 2009:57). Political scientists entered the field somewhat later, but brought with them their theories and methodologies (McDonnell, 2009:57). Similarly to economists, political scientists “adopted the dominant rational choice paradigm” (McDonnell, 2009:57). This is what Howlett *et al.* (2009:8) refer to as ‘positivist’ approaches to analysing policy. This approach requires “evaluating outcomes”, as well as developing an understanding of how theory and practice are, at most times, not aligned (Howlett *et al.*, 2009:8). These approaches are dominant in the literature reviewed for the thesis. While many authors do not explicitly state their approaches to undertaking an analysis of education policy in South Africa, the researcher was able to identify their approaches through careful analysis of the characteristics that underlie many authors’ intentions for their research. This is further discussed under section 2.3.

With the transition to democracy came various expectations, most of which were placed within the education sector. Chisholm (2003:285) explains that education was expected to “overcome centuries-old educational practices, social inequalities linked to educational difference, and apartheid based social values”. Most importantly, education was expected to place South Africa on the competitive road to the global market economy (Chisholm, 2003:285). This chapter will discuss the contexts, namely regime change and socio-economic inequality, that set the stage for policy analysis in post-apartheid South Africa. It will then discuss the themes present in education literature, which have been identified by the researcher as; the theoretical and philosophical approaches to education policy, curriculum reform, power relations, outcomes-based education, access to quality education, inclusive education, and finally the roles of teachers. It will discuss approaches undertaken in the analysis of education policy in the period between 1995 and 2015. It will also discuss and elaborate on Bacchi’s (2009) WPR approach, the value it brings to the thesis as well as present examples of how the approach has been applied.

### 2.1. The contexts of South African basic education policy analysis

Through the thorough analysis of the policy document, the *White Paper on Education and Training 1995*, and the literature, the researcher was able to identify two distinct contexts

within which education policy functioned, and within which it was analysed. This was accomplished by considering the importance that Bacchi (1999:7) places on the context within which policies are framed. While there are two contexts identified by the researcher, it is important to point out that the contexts are related. In other words, the context of regime change is associated with the circumstances that predate the transition period from apartheid to democracy, as well as the period following the change. Socio-economic inequality is very much associated with the “history-specific” factors under apartheid, the feeds into socio-economic inequality today. Simply put, South Africa’s socio-economic inequality is a result of apartheid history, as well as events that occurred during and after the change in regime.

Chisholm and Chilisa (2012:372) state that the history of a country sets the context for the social, political, and economic lives of its citizens. In the context of South Africa, they identify three distinct turning points that have defined the historical contexts (Chisholm & Chilisa, 2012:372). The first is the unification of South Africa in 1910 under white rule, which resulted in strict regulations and limitations on the black population in terms of land, labour, and their social lives (Chisholm & Chilisa, 2012:372). The second turning point was the legalisation of segregation in 1948 under which “Bantu education, and the Bantustans were introduced” (Chisholm & Chilisa, 2012:372). The 1970s was characterised by large “social, economic and political inequalities”, which were specifically linked to a decline in economic growth and increasing unemployment (Chisholm & Chilisa, 2012:373). The third turning point was South Africa’s struggle for independence, and violent conflict between the black majority population and white-led apartheid government, which resulted in a negotiated settlement and the first democratic elections in 1994 (Chisholm & Chilisa, 2012:372).

As mentioned in chapter one, the violent conflict reached all areas within society, especially the student and school-going populations. Chisholm and Chilisa (2012:374) state that “A vital aspect of the South African educational landscape was the roles played by the student movement in the 1970s and 1980s and the teacher union movement in the post-1994 period in shaping both teacher policy and classroom practice”. According to Bloch (2009:93) the struggle for liberation, as far as learners were involved, provided them with a feeling that they belonged, it taught them to have self-discipline and a respect for authority. It also gave learners a sense of the value of education, in the provision of important life skills and socio-economic progress (Bloch, 2009: 93).

Narrowing the history to education, it is clear that the education history in South Africa is one of oppression, which led to violence and resistance (Chisholm & Chilisa, 2012:373). According to Chisholm and Chilisa (2012:374), there is a pattern of disruption associated with South African education policy change, due to “massive repression for three decades after the 1950s”, that has continued post-1994 that is framed by “social, political, and economic conditions”. This represents a long history of fighting for regime change, and as has been noted, influenced education remarkably.

The historical unequal and uneven distribution of educational resources, between former white and Bantu education schools, still carries effect in the new democratic education system (Sayed & Kanjee, 2013:7). Not only did it lead to unequal access and unequal learning outcomes then, but this form of inequality still persists today (Sayed & Kanjee, 2013:7). Bloch (2009:91) emphasises that Bantu Education produce insignificant outcomes; it also left behind underfunded and under-resourced schools (and also uneducated parents, whose children now attend school). It also therefore contributed to majority of black teachers being under qualified to enter the new democratic system of education, having never received (or have access to) the training and qualifications of their new white peers (Bloch, 2009:91).

Socio-economic inequality is defined through measures that represent inequality in terms of economic and social indicators (Pandey & Nathwani, 1996:187). Economic indicators are concerned with the income distribution across the population, while the social indicators are concerned with aspects such as life expectancy and the quality of life of the overall population (Pandey & Nathwani, 1996:187). The quality of life includes having access to basic services, including health, water and sanitation, electricity, and education (Pandey & Nathwani, 1996:188).

Education has always been considered as the key to transforming society, and through which democratic values are realised within citizens (Bloch, 2009:26). For Bloch (2009:25), a country’s education system is a reflection of its society, how people within the society interact with each other, and its current conditions. Therefore, Bloch (2009:25) believes that inequality is reinforced within the education system in South Africa, and has failed in its attempt to be inclusive. Socio-economic inequality is one of South Africa’s biggest problems. In terms of education policy’s contribution, at the advent of democracy, education policy was one of the key role players in levelling the playing field. The responsibility of education,

aligned with United Nations Millennium Goals, was said to provide access to schooling for all learners, regardless of race, ethnicity, or gender. Access for all learners was achieved before the Millennium Goals deadline, and statistically, all learners of basic education age (ages seven to 15 years) are attending some form of schooling. However, this access did not guarantee quality.

Economic inequality indicators show that there has been an increase in the black middle-class, which has decreased the gap between racial groups, but the African population is still “overrepresented among poor households” (Fiske & Ladd, 2004:53). In terms of education, a large part of the black middle-class population have relocated themselves so that they are closer to “former white schools”, at the expense of “promoting the interests of poor and marginalised blacks” (Fiske & Ladd, 2004:53). According to Fiske and Ladd (2004:54), learners from poorer households would usually face more educational challenges, resulting in larger costs for education needs than those from wealthy and well-educated households.

Taking inequality in education further, Fleisch (2008:2) identifies two parallel economies within the education system. Firstly, there is one system that is well-resourced, such as former white and Indian schools (Fleisch, 2008:2). These schools are very small, but are growing in their independence, and produce the majority of university entrants (Fleisch, 2008:2). The second system is described as schools that educate the majority of working class and the poor (Fleisch, 2008:2). Within the second system, every child brings with them their health, family and communities issues, and have teachers and institutions that are less than adequate to deal with such issues (Fleisch, 2008:2). Most of these learners read and write at a very limited “functional level” (Fleisch, 2008:2). As Fleisch (2008:2) suggests, this is indicative of very unequal learning experiences. Furthermore, the unequal learning is still separated across racial lines, giving white minority a superior learning experience over the (poor) majority of black learners (Fleisch, 2008:2). Education is only one part of the social inequality indicator that largely affects the lives of the majority of black learners in South Africa.

## **2.2. Themes in education policy literature in South Africa**

As discussed in section 1.5, in analysing the context of South African basic education policy the researcher identified several themes, each representing a dominant focus discussed within

the researched literature. Each of these themes, represented below, provide an analysis of the literature between the period of 1995 and 2015.

### **2.2.1. The theoretical and philosophical approaches to education policy in democratic South Africa**

Never have approaches to education and schooling been debated as much as in the past decade. According to Robinson and Aronica (2015:xxii), mass schooling only became part of the developed world in the mid-nineteenth century and was mainly due to the demands made during the Industrial Revolution. This form of schooling is for economic mass production and to improve the system, and as time progressed, the standards movement was introduced to make the system of mass schooling more efficient (Robinson & Aronica, 2015:xxiii). Robinson and Aronica (2015:xxiii) emphasise that this is how education systems across the world function today, but that it is not a system that adequately deals with the changes that we experience in the twenty-first century. Traditional forms of education and schooling have been operating without being questioned, and have not reformed in a way that would meet the demands of today's learners (Robinson & Aronica, 2015:xxiii). In this section, one will note that the basis of theoretical or philosophical approaches to education in the South African context is largely based on the international circumstance. Young (2001:19) argues, "All countries regardless of their history or stage of development have to confront similar forces of globalisation and their impact on national economies". It is therefore clear that the effects of global trends on education in South Africa was, and still is, unavoidable

Muller (2001:58) engages with this debate and points out how many countries around the world are moving in a "uniform direction" towards progressivism. The motivation behind a progressivism approach, according to Muller (2001:58), is a movement in education for social justice. This was due to the fact that "industrialism and mass schooling together were producing an uneducated and unskilled working class" (Muller, 2001:58). The idea behind the progressivism approach to education was to produce equal outcomes, especially for working class children, who it seemed, were being disadvantaged by the schooling system.

With its foundations of social justice, equitable outcomes, universal mass education and disdain for traditional forms of schooling, progressivism was appealing to many important players within the new ANC-led government who had their input in restructuring education in South Africa (Muller, 2001:58). The progressivism approach to education in South Africa

does, however, predate democracy in the South African context, as is evident in the People's Education manifesto, the National Education Policy Investigation (NEPI) report, as well as the ANC's yellowbook on education (Muller, 2001:61). Progressivism views the teacher as a facilitator rather than an "instructional specialist", which has proven to be one of its many shortcomings (Muller, 2001:62). South Africa's education policy is largely influenced by progressivism ideas in its policies on learner-centred approaches (this is most evident in the *White Paper on Education and Training 1995*). It is therefore clear that for Muller (2001), the problems in education policy are its philosophical and theoretical underpinnings and motivations, which have influenced and shaped education policy.

Young (2001:23) also acknowledges the influence of progressivism on education policy, but furthermore identifies social constructivism and postmodernism as influential too. Young *et al.* (2001:11) argue that while education policies have mainly been viewed as idealist in the 1990s, they have taken a more realist stance in the last decade. Young (2001:18) argues that the government was strong in being a visionary (or idealist) for the future, but weak when it came to the conceptual and theoretical basis that would support development, post-apartheid. Young (2001), like Muller (2001), believes that as a theoretical approach to education policy, progressivism lacks the flexibility in terms of context and environment, and education policies post-1994 have shown a disregard and lack of concern for the reality of schools.

Allias (2012:253) constructed her argument around the idea that education policy, in global context, is based on neoclassical economics. Neoclassical economics' reasoning is based on "the notion of rational individuals maximizing utility in market transactions, as well as the notion of information asymmetry requiring government regulation of markets" (Allias, 2012:253). The most important aspect of these ideas is of the learner as individual, which developed in large part due to opposition to subject-based curriculum (Allias, 2012:254). Like progressivism, the neoclassical approach to teaching is learner-centred, as the teacher only has a facilitating role.

Related to the above neo-classical approach is Human Capital Theory, which receives special attention in this thesis due to its prominence throughout education policy in South Africa during the time of transition. In other words, Human Capital theorists believe that "education increases the productivity and earnings of individuals; therefore, education is an investment" (Tan, 2014:412). Tan (2014:424) criticizes Human Capital approaches in that it is well-

documented that education as a focus point provides an increase in private returns, but not in social returns. Tan (2014:429) stresses that a reliance on Human Capital approaches to policy, specifically in education, removes the values that education is meant to promote, such as freedom – and in the case of South Africa – diversity and cultural awareness.

In her analysis of Human Capital Theory, Christie (1997) compared South Africa and Australia in education policies to identify similarities. Human Capital Theory is evident in both South Africa and Australian agendas of education, but with local differences. At the time of the transition, Human Capital Theory was an appropriate resolution to provide skills to the large workforce and to implement development strategies (such as the Reconstruction and Development Plan) (Christie, 1997:60). This theoretical approach, in the context of South Africa, came to be a resolution to change education quickly and to promote it as transformation. Fataar (2006:645) states that the macroeconomic approach (Human Capital Theory) to policy limited educational changes, in terms of budget restraints and cutbacks. Human Capital Theory is mostly highlighted in the *White Paper on Education and Training of 1995*, through strategies of Human Resource Development.

### **2.2.2. Curriculum reform**

Curriculum reform is the most popular debated topic since the democratic transition, and the most critiqued literature in education policy. This section will focus on curriculum reform, and the problems perceived by the various authors in the transformation of the curriculum. The power relations between different actors and interest groups, namely those involved in curriculum reconstruction, is the most common category studied under curriculum reform.

During the transition, according to Fataar (2006:645), the negotiated settlement in some sense limited the effect of the ANC-led Government of National Unity (GNU) to drive the policy agenda in a more equity-based direction. Many bureaucrats had influence over the curriculum structure, and in some ways reduced the influence of the Minister of Education himself (Fataar, 2006:645). For Fataar (2006), the problems that have been associated with the curriculum are due to the large number of stakeholders involved (especially labour unions and contesting interest groups), the inexperience of the ANC-led government, and the influence of critics that created a counterattack in media and public support. This resulted in a weak foundation for the future of curriculum policy.

Fataar (2006) and Jansen (1998) agree to some extent, that the curriculum has, in many ways, been used as a political instrument. Jansen (1998) discusses curriculum reform, specifically South Africa's choice of Outcomes-Based Education and the policies surrounding OBE. Jansen's (1998:321) argument implies that OBE was used as a political response to apartheid education instead of being "concerned with the modalities of change at classroom level". Like Fataar (2006), and Cross, Mungadi and Rouhani (2002), Jansen (1998) believes that education reform during this period was a symbol of the government being active in their transformation strategies.

Jansen (2002:203) emphasises, "The symbolic prominence of education policy is evidenced in the lack of integration of various national policy statements". The example Jansen (2002:203) uses, is the incoherence across the various White Papers produced after 1994. Like Christie (1997), Jansen (2002:204) refers to South Africa's dependence on international consultants, and international trends as guidance to the first few years of independence, to end his argument for political symbolism. Many of the education policies themselves mention the influence of globalisation and how important it is to keep up with international trends (Jansen, 2002:205).

Chisholm (2005), reflecting on her own experience on the Review Committee to revise Curriculum 2005, investigated the social construction of the Revised National Curriculum Statement (RNCS). During Chisholm's (2005:194) research, two main approaches to the interpretation of curriculum policy were identified. The first focuses on curriculum as policy and is concerned with the "symbolic aspect of policy and its essentially political character, on descriptions of the origins and unfolding of policy, conflicts between curriculum in theory and practice, and the relationship between curriculum and identity" (Chisholm, 2005:194). The second approach is as curriculum as knowledge (Chisholm, 2005:194). It places emphasis on the construction of knowledge, and the role of the school with regards to teaching and learning (Chisholm, 2005:194). Chisholm's (2005:205) research found that the RNCS had a combination of material and symbolic interests, and therefore was determined by a "multiplicity of players".

Cross, Mungadi and Rouhani (2002) analysed the competing interests of the various groups (responsible for the shaping of the new curriculum), and this caused structural and policy tensions within the system. The main focus for Cross *et al.* (2002:172) is how the new

curriculum policy initiatives play out in reality, and how government and stakeholders deal with the challenges posed by these tensions. According to Cross *et al.* (2002:173) “the liberation movement requested the National Education Crisis Committee (NECC) – a nominal alliance of progressive education and labour stakeholders – to develop an agenda and opposition papers on education”. This resulted in the establishment of the National Education Policy Investigation (NEPI) in 1991, which was “the first major attempt to offer new conceptualisation of the education system”. In the opinion of Cross *et al.* (2002:174), NEPI did not deal with the implementation of problems of the new curriculum, and only dealt with the negotiated needs of politicians. NEPI also did not appreciate the role of society within the policy process and ignored the lack of resources available to schools (Cross *et al.*, 2002:174). In agreement with Cross *et al.* (2002:177), Fataar’s (2006) analysis also places emphasis on the fact that the ANC could not fully implement its policy initiatives within the GNU, as every aspect of policy became a negotiated settlement, and government could not move forward without consensus.

Cross *et al.* (2002:181) also draws attention to the fact that at the time of Curriculum 2005’s construction, South Africa found itself with a skills and training shortage, and labour union concerns - mainly the Congress of South African Trade Unions (COSATU) - therefore took preference over those of educational ones. This resulted in a curriculum that “focused too much on outcomes and neglected issues of content that were left to individual teachers to construct” (Cross *et al.*, 2002:182). Cross *et al.* (2002:184) do, however, stress that implementation problems could also have been reduced by providing teachers with the necessary training and allocating resources effectively. Also, significant to Cross *et al.*’s (2002:182) analysis, is the fact that the conceptualisation of terms, especially with regards to outcomes and competence, did not draw sufficient meaning as pedagogy.

### **2.2.3. Power relations**

Power relations share some connection with curriculum reform, and this section will concentrate on key actors who contributed to shaping education policy as a whole. Power relations are key to establishing which voices, and therefore views of certain issues, were dominant and gathered the most support. As has been established under curriculum reform, many authors are of the opinion that policies were shaped around political intentions, rather than the reality on the ground (Jansen, 2000) (Fataar, 2006) (Christie, 1997). As Cross *et al.*

(2002) suggests, this created tensions between those seeking political legitimacy and those who were fighting for change for the reality of schools. Here the discussion will look at which power relations succeeded, and how they have played out within the policy field so far.

Christie (1997:55) highlights the various groups and actors that were significant in reshaping education policy, before democracy was instituted. These groups were the African National Congress (ANC), The Congress of South African Trade Unions (COSATU), the Private Sector Education Council (PRISEC), and the National Party (NP). It is also important to point out here that the ANC and COSATU largely shared the same interests and views on education policy issues and reform initiatives (Christie, 1997:55).

According to Christie (1997:55), not all of these groups were considered in the finalisation of education policy, but all of them played their part in determining the direction of education policy debates. Within the policy process there was a “re-articulation of old concepts and the introduction of new ones” when it came to the composition of problems for the policy agenda (Christie, 1997:56). Christie (1997:56) emphasises that “all the major groupings drew explicitly on policies developed in other countries through, literature, visits, and the work of local and foreign consultants”. Christie (1997:56) also points out that the “competency” debate brought to the education policy agenda by the ANC, COSATU and PRISEC, was influenced by Australia since they all referred to the Finn and Mayer Reports in their documents and the papers they published. The new education agenda was to be entirely established and specified by the National Training Board (NTB), which consisted of members from the state, unions, capital, political and community groups (Christie, 1997:59). Christie (1997:59) places emphasis on the fact that there were no members included from the formal schooling sector, and thus the final report did not include issues in this sector.

Jansen (2001:42) explains that before the 1994 election, there was anticipation amongst various groups to be involved in the reshaping of education, and each group prepared themselves accordingly: the private sector, according to Jansen (2001:42), by means of PRISEC, the National Training Board (NTB), the labour movement within COSATU, the democratic movement by means of NEPI, and the former (re-forming) state within the Education Renewal Strategy (ERS) and the New Curriculum Model for South Africa (CUMSA). Jansen (2001:42) also points to the influence of “international aid community through multiple, self-funded sectoral reports”, and a few non-governmental organisations

through various programmes and policy initiatives. All the mentioned groups contended for positions of influence in the restructuring of education in the new democratic South Africa. Jansen (2001:42) describes this pre-election period as “projecting the symbolism of policy position”, where actors established their general policy views, consisting, however, of intention and values rather than actual policy proposals and strategies.

Political tensions are also evident in Jansen’s (2001:43) analysis, in the form of the inherited syllabi, and the renewal of education in terms of building the state’s legitimacy, and curriculum renewal. For Jansen (2001:43), The *White Paper on Education and Training of 1995* framed the core values and vision of the new democratic government, but most importantly, showed “the dominant view in the state represented by the African National Congress”. Jansen (2001:44) explains how this was the first step for the ANC-led government to establish its policy dominance within Parliament, and where political power could be consolidated.

Chisholm (2003:2) had personal experience and involvement, as a Review Committee member, in the curriculum policy process. Her experience is relevant during the time of the second Minister of Education, Kadar Asmal, from 1999 to 2004. Chisholm (2003:4) describes how most of the actors were ANC-linked, including the Minister of Education, the South African Democratic Teachers Union, the Department of Education, and the cabinet. The main issue identified among the actors, and which established clear divisions, was Outcomes-Based Education, including “its nature, manifestation in C2005 and whether it ought to be revised or not” (Chisholm, 2003:4). Chisholm (2003:4) describes how Asmal insisted on establishing the committee, and how “the relative independence of the Review Committee members from the ANC meant that the Report of the Review Committee was also independent from the views and approaches dominant within the bureaucracy and teacher unions”.

As Chisholm (2003:5) points out, there were many hostile attitudes with the final report, especially from the South African Democratic Teachers Union. This led to divisions once again, and common resolutions were established by securing Outcomes-Based Education as the philosophy of education (Chisholm, 2003:5). Chisholm (2003:11) also discusses the influence of university intellectuals, most of whom were part of the working groups that were setup to revise the curriculum. University intellectuals’ opinions and ideas were viewed as

just as important as Teacher Unions' especially in ensuring that school-based subjects, in particular science, aligned with knowledge of the field (Chisholm, 2003:11). Chisholm's (2003) work provides critical insight into the archaeology of the curriculum restructuring, and the influence of certain interest groups and individuals.

#### **2.2.4. Outcomes-Based Education (OBE)**

There have been debates about outcomes and competence within the education sector since the transition was on the horizon. OBE as a system or curriculum is unclear: some are under the impression that it is a means of managing the education system – systematic change and not curriculum change – which is the reason why some former curriculum structures remained even after the implementation of OBE. Throughout the research for the thesis, this point was not discussed very much, and so for the purpose thereof it is considered as the pedagogy for the education system, therefore forming only part of the curriculum (as described by the South African Qualifications Authority, 2003). The literature on OBE is vast and mostly in the form of critique, and in some instances it is explanatory.

Professor Jansen (1999) is notably OBE's biggest critic, especially considering his work on "Why OBE will fail". Jansen (1999:146) first discusses what OBE is, according to countries that have engaged it. OBE transfers emphasis of content knowledge onto everyday knowledge, while making explicit what learners should focus on, especially in content-heavy curriculum (Jansen, 1999:146). OBE's assessment is goal-directed and is a measure of accountability in terms of "evaluating the quality and impact of teaching in a specific school" (Jansen, 1999:146). It is from these expectations that Jansen (1999:146) makes his argument about why it will fail in the South African context.

One of the reasons for OBE's failure in South Africa, according to Jansen (1999:147), is that the "language of innovation" accompanying OBE is "too complex, confusing and at times contradictory". There are more than 50 distinctive concepts and labels, according to Jansen (1999:147), that need to be understood by teachers, and at the same time they must maintain changes in meanings and priorities that are assigned to the different outcome labels, over time. Another reason for Jansen's (1999:147) criticism, is the relationship that OBE affords curriculum and society: in this instance, South Africa stipulates OBE as a solution to lack of economic growth and social justice, and as Jansen (1999:148) suggests, there is no evidence to advocate that curriculum reform can have any effect on economic growth.

Jansen (1999:149) states that OBE will most definitely fail in South Africa because “it is based on flawed assumptions about what happens inside schools, how classrooms are organised and what kind of teachers exist within the system”. Jansen (1999:150) makes his argument in opposition to this kind of education reform, and how it will not enhance the quality of what is taught in schools. For Jansen (1999:150), it is also undemocratic to specify outcomes in advance, therefore questioning its philosophical underpinnings and stating that it is instrumentalist. Jansen (1999:150) argues that OBE will not address socio-economic inequality in the way that the proposed education system promised to. Also, students cannot be expected to take on creative approaches when outcomes have already been stated, therefore contradicting the fundamentals of OBE (Jansen, 1999:150).

Furthermore, learning programmes are not clearly stated within OBE, leaving it up to teachers to come up with what is traditionally known as ‘curriculum content’ (Jansen, 1999:151). According to Jansen (1999:151), along with the lack of learning programmes, teachers will have an increased burden of administration with continuous assessment practices, taking time away from preparing for lessons. Jansen’s (1999) critical analysis of OBE, as an education policy framework, gained large support from the media, the public, academics, opposition parties, and in some instances, teachers. These factors are what led Jansen (1999) to believe that OBE as a pedagogy is problematic for the South African education system, and that it will fail.

According to Fiske and Ladd (2004:154), the new democratic government, just like its predecessors, had to show that it would be able to successfully instil a new ideology through education, and at the same time prove that it had discredited education under apartheid. The new education system had to put emphasis on the constitutional values of equity and human rights, and in doing so, create universal access and shared expectations among all learners (Fiske & Ladd, 2004:154). Also important, was to ensure that the curriculum was not authoritarian in any respect (Fiske & Ladd, 2004:155). Here, it is vital to note that OBE has different forms, and how it has been introduced in South Africa is unique to the context.

OBE, according to Fiske and Ladd (2004:157), is rooted in B.F. Skinner’s behavioural psychology, Paolo Freire’s pedagogical principles, Benjamin Bloom’s learning techniques, and curriculum objectives, as presented by Ralph Tyler. For Jansen (1999:146), this is indicative of a lack of historical foundation and legacy, as it is drawn from various disciplines

and there is no agreed-upon origin. Fiske and Ladd (2004:157) also indicate that OBE in South Africa is like that of progressive learner-centred principles as used in English private schools. For Fiske and Ladd (2004:157), OBE became popular in South Africa only due to its reputation in other English-speaking countries, such as Australia and New Zealand, which also later came to discredit it. At the time of OBE's introduction, the Department of Education was visited and influenced by OBE specialist, William Spady (Fiske & Ladd, 2004:157).

While being influenced largely by international trends in OBE, South Africa did add its own local aspects to fit it to the context (Fiske & Ladd, 2004:157). The only difference between South African OBE and its international counterparts, is that "South African policymakers introduced broader values, such as access, equity, and development, that were driving social change in the post-apartheid period" (Fiske & Ladd, 2004:157). International proponents' OBE structure was organised with a clear picture in mind of what learners had to achieve, and the instruction and assessment methods (Fiske & Ladd, 2004:157). According to Fiske and Ladd (2004:157), in South Africa there was large emphasis placed on the progressive pedagogy of learner centeredness, where teachers are facilitators, and where knowledge is based on everyday life experience. This proved to be too much for Spady, and he withdrew himself from South Africa's style of OBE, and later referred to it as "a professional embarrassment" (Fiske & Ladd, 2004:157).

Fiske and Ladd (2004:157) find the problems in OBE policy in aspects where it is meant to drive the necessary transition in social change, equity and access. It is clear that OBE is focused on individual student progress and it is therefore consistent with "people's education", which leads to it favouring social mobility instead of holding students back for not being able to master the material (Fiske & Ladd, 2004:158). Another problem, pointed out by Fiske and Ladd (2004:158), is its constructivist approach to everyday knowledge as the focus of learning experiences, rather than formal school knowledge.

OBE, according to Fiske and Ladd (2004:158), "also puts skills on the same level as content knowledge and blurs the distinction between education and training", which works in favour of those who have attained skills, but not a formal qualification. Fiske and Ladd (2004:159) emphasise that regardless of its presented problems, OBE had large public and educator support for its guiding principles. OBE was adopted as a philosophy for the new education

dispensation in democratic South Africa, and the curricula that followed, especially C2005, are part of the OBE process, and are managed by OBE principles (Fiske & Ladd, 2004:159). According to Fiske and Ladd (2004:171), problems with OBE mostly arose due to design issues, but also due to competing aspects of education policy fighting for attention. The biggest issue for Fiske and Ladd (2004:171) is that there is not enough investment, in terms of human and physical resources, required to implement OBE successfully and to effectively fulfil the goals of equity schooling.

Amongst all the dislike for OBE, there are a few who believe that it was the best way towards transformation. One prominent supporter of OBE is Chisholm (2003; 2004). As mentioned previously, she served on the Review Committee, and she states that it was the only viable alternative to apartheid education. Chisholm (2003:3) explains that during her time on the Review Committee there were disagreements and arguments about a lot of things pertaining to the curriculum, but the most valuable part of the new education system that they all agreed on, was OBE.

The purpose of OBE in the South African context is “to improve the quality of the learning experience through methods that emphasise activity-based rather than rote learning” (Chisholm, 2004:10). According to Chisholm (2004:10) the outcomes (that is to be achieved by the education system), which are both critical and developmental, were based on the Constitution in 1995. It is apparent that OBE in the South African context is valuable in principle, but lacks the motivation and practical application to make it successful. This is in part due to OBE’s lack of conceptualisation within the South African context, and its misinterpretation and misunderstanding by educators, critics, and society.

#### **2.2.5. Access to quality education**

Access to quality education takes on different forms within the literature. Some authors express interest only towards access to education in general, while others focus mostly on quality. It is therefore very few who put the spotlight on both, and study access to quality education comprehensively. There are also various ways in which authors have gone about measuring access to quality, most of them focusing on statistical analysis and comparisons with international results. This section will discuss literature on access to quality education and will look specifically at how it is framed in the literature. Access to quality education is

provided through the National Qualifications Framework (NQF) according to the South African Qualifications Authority (SAQA, 2003).

Sayed, Kanjee and Nkomo (2013:xv) studied and investigated access to quality education in the South African context. Their discussion considers emphasis placed on the Millennium Development Goals (MDG). Their study showed that a focus on physical access to education is no guarantee of quality, nor what students actually learn, and that this is believed to be a failure in addressing the education system in a holistic manner (Sayed, Kanjee & Nkomo, 2013:xv).

Education change, driven from the transition to a democratic government, was mostly focused on equity, redress, and access to quality. For Sayed, Kanjee and Nkomo (2013:xv), quality is the most important aspect, and should be the driving focus of education change: it is their opinion that once quality has been achieved throughout all schools, the rest will fall into place. For Sayed, Kanjee and Nkomo (2012:xvi), there have not been enough “large- and small-scale interventions” when it comes to quality of education.

Chisholm (2004) and Spaul (2013) agree that there is too much of an emphasis on Matric results as indication of quality education in South Africa, especially from the Minister of Education’s side. According to Chisholm (2004:5) and Spaul (2013), there is much evidence to suggest that there is a crisis in quality of basic education. The evidence, according to Chisholm (2004:5), suggests that there are large differences in the quality of education of schools in informal settlements (former homelands) compared to that of urban schools. Chisholm (2004:9) supported a report released by the Department of Education (2003), known as the Departmental Review of the Financing, Resourcing and Costs of Education in Public Schools. This report revealed, “Poorer schools need assistance in procurement of goods and services and asset management and also continue to suffer from expensive textbooks and an insufficiently managed ordering process”.

For Chisholm (2004:10), quality inputs vary, and she questions the inputs of the curriculum and the pedagogy of OBE in their value to quality. It is also emphasised by Chisholm (2004:12), that curriculum and pedagogy are only successful in as far as “the relationship between learning outcomes and the provision and use of learning resources” is strong. Evidence also, from Chisholm’s analysis (2004:14) suggests that education quality is linked predominantly to “teachers, texts and the values promoted in schools through official and

hidden curriculum” (Chisholm, 2004:14). Chisholm (2004:14) emphasises that violence in schools is a continuous problem, and so is racism and sexism, which feed into the crisis of HIV and abuse in schools. While the evidence indicates that there has been very little impact on quality in the first ten years since the transition, Chisholm (2004:19) concludes that research does suggest that “[q]uality improvements have been linked to efforts to achieve equity and greater access to schooling”.

Spaull (2013:10) provides an empirical analysis of South Africa’s education quality. His study results show that the majority of South African learners at basic education level cannot read or write, nor do they have computer literacy skills, and most of them are “functionally illiterate and innumerate” (Spaull, 2013:10). Discussion and debates on definitions of “quality” were also discussed by Spaull (2013:12), in which he stresses the cognitive outcomes of education as the only quantifiable measure for quality, which is therefore the focus of his analysis.

The most important motivation for his study, Spaull (2013:21) highlights, is “the suspicion that enrolment, and even attendance (access) did not always translate into learning (quality)”. For Spaull (2013:22), unravelling the fact that while South Africa may experience some of the highest enrolment rates globally, the country underperforms tremendously in primary school outcomes, was pertinent in showing that access (attendance) is not a defining factor for successful policy implementation.

Concluding his study, Spaull (2013:59) states that the Department of Basic Education is oblivious to the ‘real crisis’ in education, which is quality. Spaull (2013:59) emphasises that “gross underperformance is ubiquitous, that inequality is systemic, and that there has been only marginal progress in educational outcomes since the transition”. Like many authors, Spaull (2013:60) concludes his argument by stating that “poor school performance in South Africa reinforces social inequality and leads to a situation where children inherit the social situation of their parents, irrespective of their motivation or ability”.

According to South African education policy, the NQF is the largest provider of access to quality education, and plays a role in encouraging lifelong learning Monitored and established by the South African Qualifications Authority (SAQA). The *White Paper on Education and Training* (1995:18) states that the role of the NQF is to, “enable all existing public and private sector education and training providers to assist in establishing appropriate

national standards in their specialised fields through the respective accrediting bodies, and to seek recognition for their programmes in terms of such defined standards”. The *White Paper* also maintains “the NQF will be the scaffolding on which all new levels of quality are built” (Republic of South Africa 1995:18). It is therefore responsible for the setting of standards, in terms of the required learning outcomes to be achieved, and the setting of appropriate assessment practices. The NQF is also representative of the systemic change that occurred within the education system after apartheid (SAQA, 2003). According to SAQA (2003), “[t]he NQF is a quality cycle that implies that quality is dynamic and not static, that quality means the continual growth and development of standards for learners’ needs and uses”.

Allias’s (2012:255) research examined the qualifications framework of sixteen different countries. Her research mostly found that outcomes-based qualifications frameworks are being introduced as education system move away from traditional forms of schooling and issuing qualifications (Allias, 2012:255). Similar to South African education policy debates, the outcomes-based qualifications framework recognises knowledge and skills, which workers have gained through experience (Allias, 20102:255). Most arguments made in favour of outcomes-based approaches, are that old and traditional ways of schooling and qualification are out-dated, are not moving forward with vast technological development and globalisation, and do not meet the demands of the current economic conditions (Allias, 2012:255). Allias (2012:255) believes that outcomes-based qualifications frameworks encourage increased central education policy, which addresses issues of economic competitiveness and social justice (Allias, 2012:256). This, Allias (2012:256) claims, will reward those who invest in education, in forms of knowledge, economic prosperity, and equality, while at the same time improving competitiveness of industries.

Another aspect that shapes access to quality education in South Africa and shares a role with inclusive education (discussed below), is that of compulsory education. Compulsory education was initially legalised to prevent children from being exploited, by working and dropping out of school early in life, without achieving any level of qualification to work formally (Republic of South Africa 1995, 77). Compulsory education also ensures that the Constitutional rights of children are upheld (Republic of South Africa 1995, 77), and it paves the way for inclusivity, in that no child (regardless of gender, race, disability or background) can be excluded from the compulsory period (Republic of South Africa 1995, 77). Literature specific to compulsory education has not been found during the time of this thesis, and is

only mentioned occasionally, as part of wider subjects, such as poverty, curriculum reform and access to education, to name a few.

Like compulsory education, literature on no-fees school in South Africa is sparse, and most sources only analyse the policy during the period that it was released. Like OBE, the no-fees school structure in South Africa is unique. In South Africa, no-fees apply to both primary and secondary schools but are prioritised by government between the ages of seven and fifteen, also referred to as the compulsory school years (Ahmed & Sayed, 2009:205).

No-fees schools, also part of access to quality education ingenuities, and playing its role in inclusive education, are an initiative to create access to schools within impoverished communities. Ahmed and Sayed (2009:205) state that the no-fees school policy, initiated as a pro-poor policy, is key to providing access for disadvantaged learners, and in some respects, it attends to societal inequalities. The no-fees schools are a policy that was revised in 2006 for poorer schools in poorer districts and communities (Ahmed & Sayed, 2009:205). No-fees schools are regulated through the Provincial Education Department (PED) (Ahmed & Sayed, 2009:206). According to Ahmed and Sayed (2009:206) “each school is assigned a poverty score using data from the community in which the school is located”. According to Ahmed and Sayed (2009:206) there are three poverty indicators that are used from the data, namely “income, unemployment rate and level of education of the community”, which are weighted, and a poverty score is allocated to the community and school, accordingly. The implementation of no-fees schools policy is critically analysed by Ahmed and Sayed (2009:206), because while these schools receive a generous amount of funding from the state, other sources of income, such as private funding, are limited. Schools such as these are found largely in disadvantaged and rural communities, where skilled teachers and principals are few (Ahmed & Sayed, 2009:203).

Ahmed and Sayed (2009:212) have stressed that interpretation of exemption from fees, and its implementation, varies according to each school. The most notable barriers are School Governing Bodies (SGBs), the economic status of parents, and geographical difficulties (Ahmed & Sayed, 2009:212). As mentioned by Chisholm (2004:10) previously, the report released by the Departmental Review of the Financing, Resourcing and Costs of Education in Public Schools, requested government to “question the legality of ‘hidden fees’ that schools

charge” and suggested monitoring school fees. These ‘hidden fees’ can include anything such as food, transport, and uniforms (Chisholm, 2004:10).

Also restricting the implementation of the no-fees policy, are budgetary constraints from the national budget, as well as the macro-economic policies (Ahmed & Sayed, 2009:212). Ahmed and Sayed (2009:2016) conclude, “Measures that must accompany the non-fees legislation, such as poverty reduction, capacity building, the supply, remuneration of teachers and investment in infrastructure development, must become part of the policy framework”.

### **2.2.6. Inclusive education**

Debates about inclusive education have also been vigorously discussed in education policy. At first glance, the term “inclusive education” creates some confusion, as several authors apply the term either to the exclusion of learners with disabilities and/or to all disadvantaged learners, whether this disadvantage comes in the form of a disability, or socio-economic background. Inclusive education is part of the Education for All initiative, which started in 1990 within the international community, and now forms part of the United Nation’s many initiatives for education (Donohue & Bornman, 2014:1) (Engelbrecht, Nel, Smit and van Deventer, 2016:520). Here, inclusive education is described as a goal that would enable access to mainstream education for all learners: disabled, poor, and diverse cultural backgrounds. This global movement has encouraged the concept of inclusive education as a right of every child, and specifically focuses on access, acceptance, and participation in conventional education (Engelbrecht *et al.*, 2016:521).

The basis for inclusive education in South Africa is outlined in the Education *White Paper 6* (Republic of South Africa 2001). The *White Paper 6* (Republic of South Africa 2001, 10) clearly states the integration of the education system for all learners, and this includes learners with disabilities. This would be suggestive of the non-existence of “special schools”, but rather of schools being equipped and resourced appropriately to deal with learners who have disabilities and integrating them with learners who are abled (Donohue & Bornman, 2014:2). There are, however, conceptual difficulties in that in South Africa, there is no consensus in “what should and should not be classified as a disability” (Donohue & Bornman, 2014:3). Even though school is compulsory between the ages of seven and 15, up to 70% of South Africa’s disabled learners are not attending school, according to Donohue and Bornman (2014:3). From Donohue and Bornman’s (2014:11) analysis, it seems that there

are issues with implementation of what is stated in Education *White Paper 6*, mostly being resources-based. The lack of resources includes trained teachers, appropriate facilities and learning environments, and learning materials (Donohue & Bornman, 2014:11).

Lomofsky and Lazarus (2001:303) focus their analysis on what ways the general education system has taken steps towards becoming more inclusive. Their (2001:306) study draws attention to, not just inclusive education in terms of the diverse learning needs of learners, but also the inclusion of special needs education into mainstream schools. Lomofsky and Lazarus (2001:306) define special needs as “the difficulties or barriers encountered by the individual in interacting with his or her environment”. Their (2001:306) argument is also based on the premise that it is the system that needs to adapt to accommodate the individual.

Issues surrounding inclusive education, according to Lomofsky and Lazarus (2001:307), are mostly associated with a lack of implementation of policies. The main reason for the possible lack of implementation could be due to lack of resources, especially funding. To implement inclusive education to its full extent would require an influx of funds to disadvantaged schools, where most of the ‘special needs’ learners reside (Lomofsky & Lazarus, 2001:315). Also contributing to inclusive education’s deficiency in implementation, are untrained teachers, according to Lomofsky and Lazarus (2001:315).

Engelbrecht *et al.*’s analysis draws similar conclusions to Lomofsky and Lazarus (2001). Engelbrecht *et al.* (2016:521) state that it has been particularly difficult in the South African context to truly bring inclusive education into effect. They argue that this is due to idealistic policies that were incapable of addressing and eliminating structural inequities of the apartheid education system (Engelbrecht *et al.*, 2016:521). Furthermore, it is argued that it is also due to “the dissonance between the government’s socio-political imperative for change and existing economic realities” (Engelbrecht *et al.*, 2016:521).

While the achievements of education policy do not seem like much, Engelbrecht *et al.* (2016:523) argue that on a quantitative scale, the education system has improved in terms of “increasing pre-primary, primary and secondary school enrolments”, which are comparable to other middle-income countries. In agreement with Christie’s (2008) findings, Engelbrecht *et al.* (2016:523) emphasise that qualitatively, conventional education, upon close analyses, “indicates that inequities of class, gender and geography do not translate into full participation and quality”. This also points to the analyses by Badat and Sayed (2014), that

access is differentiated, despite the desegregation of schools. Therefore, the argument is made that equity of opportunity and outcomes are decided upon by social class and geography (Badat & Sayed, 2014).

Engelbrecht *et al.* (2016:530), findings show that there is “tension between the contents of policies, systemic realities including funding constraints and personal interpretations” of those who are working in full service schools (Engelbrecht *et al.*, 2016:530). A full-service school is defined as an ordinary primary school that has been provided with the necessary physical, material, human resources, and professional development of staff so that they can accommodate a diverse range of learning needs (Republic of South Africa 2001:10). The results also reflected that the ideals for inclusive education policy in South Africa have not been met or achieved. Engelbrecht *et al.* (2016:532) concluded “There is therefore a clear and substantial gap between the idealistic conceptualization of inclusive education in South African policy documents and its implementation”. From their research, it is also clear that policy, in terms of inclusive education, has largely remained symbolic.

### **2.2.7. The role of teachers**

Teachers are also a highly contested theme. There is a vast amount of literature that mentions teachers and their role in the education system and the policy implementation process, as well as teacher identity and job satisfaction, all of which are considered below.

Bell and Stevenson (2006:2) state that teachers (and other personnel working in schools), do not just have the role of “receivers and implementers of policy decisions made elsewhere”, but they also play a significant part in shaping the education policy process. If policy is considered a process of dialect and discourse, then those who are going to be affected by the policy proposal should be engaged in shaping its development (Bell & Stevenson, 2006:2). Furthermore, not only are teachers key to policy development, but their roles as teachers and educators are constructed within education policies.

Jansen (2001:242) provides an example of how education policies frame certain “images” of teachers, and what they should be. However, Jansen (2001:242) finds that these “policy images” are in conflict with teachers’ “personal identities”. For Jansen (2001:242), these “policy images” can be implicit or implied, but they contain what policymakers would prefer teachers to be in the context of South Africa, a form of idealism about teachers. Further,

Jansen (2001:242) explains that the teacher identity is a concept that explains teachers' professional capacity, which includes the subject matter they have to teach, their training and preparation levels, and the formal qualifications that they obtained. This identity of teachers is very much linked to their ability to implement policy proposals (Jansen, 2001:242).

Jansen's (2001:244) analysis provides a critique of teachers' roles as defined through education policies, but it also gives one an idea of how these "perceived images of teachers" were in strict conflict with how teachers view themselves (teacher identity). In Jansen's (2001:243) analysis, he identifies two ways in which "teacher images" have been shaped by the policy process: under apartheid, and within the new democratic dispensation. Teachers under apartheid were viewed as a "state functionary with limited autonomy" (Jansen, 2001:243). In other words, the role of teachers was purely political and bureaucratic, with compliance to state education (Jansen, 2001:243).

Teachers after apartheid were viewed in three ways within policy proposals (Jansen, 2001:243). Firstly, they were viewed as liberators in that they would become "knowledge producers; they would take charge of their own classrooms; they would initiate discussion; they would select liberatory content knowledge for the curriculum; they would empower learners; they would change the world" (Jansen, 2001:243). Secondly, teachers were viewed as facilitators when the new curriculum pedagogy (OBE) was instituted (Jansen, 2001:243). Jansen (2001:243) states, "the teacher would disappear in a classroom plan where learners and learning became the central focus of policy change under the new curriculum". Thirdly, teachers were viewed as "performers", where their activities were measured against a set of standards (outcomes) regulated through the state (Jansen, 2001:244).

According to Wolhuter (2014:15), teachers form an essential part of "process quality", which is defined as "the quality of teaching and learning that takes place". Teachers are classified by Wolhuter (2014:15) as a "constituent component" of process quality, and are described as "the teacher factor". Here they are responsible for "the knowledge, input and methods of teaching employed". In line with the "process quality", Wolhuter (2014:15) describes that there is a nationwide shortage of up to 15,000 teachers. Furthermore, Wolhuter (2014:15) explains that as much as five Provincial Education Departments (PED) are paying up to R2 billion per year for an excess number of teachers, for teaching posts that have been abolished.

According to Wolhuter (2014:16), the knowledge factor of teachers can be measured, but is not limited to this form of measurement, by the duration that teachers attended “teacher-education programmes”. Wolhuter’s (2014:16) findings show that South Africa’s teaching programme duration does not compare to that of Europe, where teachers are involved in a five-year programme. This is, according to international standards, the equivalent of a Master’s Degree (Wolhuter, 2014:16). Wolhuter (2014:16) explains that teachers in South Africa, especially those who have been teaching even before the democratic dispensation, are uneducated according to the previously mentioned criteria. Emphasis is also placed on the fact that 26% of South African teachers at the basic education level have not obtained a Bachelor’s Degree (Wolhuter, 2014:16). Another aspect that feeds into the “process quality” is the widespread “allegations of large-scale absenteeism and the neglect of duty by South African teachers”, which have become more frequent and is mostly the concern within poor districts (Wolhuter, 2014:17). Wolhuter (2014) therefore critically analyses the role of teachers, and to a large extent, critiques their training.

Like Wolhuter (2014), Young (2001:35) expressed in his analysis six years after the transition, that there are many uneducated teachers going through the education system. It is clear that teachers, at the time of transition and the dispensation of the new curriculum (C2005), were unable to cope with the new curriculum structure, over-sized classes, and the vagueness of instruction to implement the new curriculum (Young, 2001:35).

Much of the literature also suggests that there were difficulties implementing policy initiatives due to large teacher-to-pupil ratios (Lomofsky & Lazarus, 2001:304). According to Lomofsky and Lazarus (2001:305), teachers, especially those in poorer districts, were not equipped, in terms of realising inclusive education goals, to deal with the “multiple and diverse needs” of learners, especially where class sizes consisted of 35 learners or more. According to Lomofsky and Lazarus (2001:312), The Commission, appointed in 1996 to do an inquiry into the education system, found that the system did not adequately develop human resources, which largely included the education and training of teachers.

Teachers, like businessmen and -women, lawyers, doctors, and so on, are professionals in their field. In many countries, especially Scandinavian countries, teachers are regarded with high morale and show a sense of job satisfaction. In South Africa, studies have shown that teachers are experiencing the opposite to these countries (Quan-Baffour & Arko-Achemfuor,

2014:2). Quan-Baffour and Arko-Achemfuor (2014:2) explain that “in every community and country teachers form the vehicle for provision and dissemination of relevant knowledge, skills and values for socio-economic development”. Thus, teachers are professionals.

Quan-Baffour and Arko-Achemfuor (2014:2) did an empirical analysis of job satisfaction among South African teachers. The analysis revealed several factors that are contributing to the lack of job satisfaction among teachers in the South African context. The analysis found that “occupational mobility for all teachers is almost non-existent” (Quan-Baffour & Arko-Achemfuor, 2014:2). Also emphasised within the analysis is the “condition of services for teachers” as a determinant for job satisfaction (Quan-Baffour & Arko-Achemfuor, 2014:3). Along with these, teachers expressed many issues involving safety and security, both physical and psychological, which concern their job satisfaction (Quan-Baffour & Arko-Achemfuor, 2014:3). Lastly, teachers expressed a lack of recognition from employers, parents and guardians, and communities, for their work as professionals (Quan-Baffour & Arko-Achemfuor, 2014:3). The purpose of Quan-Baffour and Arko-Achemfuor’s (2014:5) analysis was to emphasise the need for teachers in South Africa to have a clear career pathing for job satisfaction. This would include criteria set out for promotion, and a recognition of qualifications and experience, that would provide incentives and job satisfaction for teachers in South Africa (Quan-Baffour & Arko-Achemfuor, 2014:5).

From the literature, there are many issues associated with South African teachers. Literature either expresses a desperate need for more teacher training and education, and accountability, while other sources express the need for teachers to be acknowledge as professionals and be given the same incentives as other professionals. It is clear however, that teachers perform a vital part within the education system and the policy implementation process.

### **2.3. Approaches to analysing education policy in the democratic South Africa**

The literature above presents many views in how policy has been debated, and each of these offer a different means by which research and analysis was approached. All of the above-mentioned authors are prominent academics (or educationists), known and respected for their work within the education policy field. Their perspectives and ways of analysing education policy are based on an educationist outlook. Examples of educationist approaches are evaluating policy outcomes, critiquing education policy, implementation analyses, comparative analyses, case studies, evidence-based evaluations, and also include many more.

De Clerq (2006) demonstrates a critical evaluation of education policy outcomes post-apartheid. De Clerq (2006:128) categorises policies according to their “purpose, target groups, distribution of costs and benefits and location of their impact”. These categories are identified firstly, as substantive policies, which “reflect what the government should do” (De Clerq, 2006:128). There are procedural policies, secondly, which “spell out who is going to take action and through which mechanisms” (De Clerq, 2006:128). Material policies are the third categorisation, and this explicitly describes how “real resources” will be provided to interests groups (De Clerq, 2006:128). The opposite of material policies is that of symbolic policies, which are considered as “more rhetorical about changes needed” (De Clerq, 2006:128). The last two categories are regulatory policies and redistributive policies. The former refers to policies that would “limit the behaviour and actions of groups and individuals”, and the latter to policies that would “shift the allocation of resources or rights among social groups” (De Clerq, 2006:128). De Clerq (2006:128) indicates that her research, and the categorisation of policies, shows that “[m]ost of the new education policy documents are symbolic, substantive and redistributive”.

De Clerq (2006:137) further evaluates the macro education policy framework, where emphasis is placed on lifelong-learning as a system, which is aligned to meet the needs of the country’s economic growth and social equity. This is in contrast to Chisholm and Fuller (1996), who argue that the framework for an integrated system of education and training was based primarily on the development of human resources for the economy and upward mobility, which, as they state, is a betrayal of the opposition movement of ‘people’s education’ because it only delivers benefits to key constituencies such as business and labour. Instead, De Clerq (2006:137) argues that analysts should rather be more aware that the way the framework for lifelong-learning is conceptualised and introduced is more threatening to its capability to reform and redress “real problems and causes of the existing poor system”. Here De Clerq (2006:137) encourages a conceptual analysis of important terms within policy proposals.

Jansen’s (1998:321) approach to curriculum reform is in the form of a critical analysis of “the philosophical, political and implementation dilemmas of OBE”. Also evident in his analysis, is an evaluation of outcomes of OBE policies while critically scrutinising these outcomes (Jansen, 1998:330). Other research done by Jansen (2002) is suggestive of a move towards implementation analysis. Jansen (2002:199) analyses seven case studies through the theory of

‘political symbolism’ to demonstrate how implementation has been unsuccessful, due to the gap between policy and practice. Jansen (2002:200) states, “we search in vain for a logic in policymaking connected to any serious intention to change the practice of education ‘on the ground’”. In this regard, the emphasis of his research was to point out the political intentions, therefore symbols, which are often missed in policymaking, especially after apartheid (Jansen, 2002:200). Jansen (2002:202) adds his voice to the debate of policy and planning, where there is great political and public involvement, but a lack of strategic processes preventing successful implementation. One of the deficiencies of implementation that Jansen (2002:203) refers to, is the revision of the syllabus, which he believes was a political statement from government to show that they were purging all apartheid policy, and that transformation was occurring.

Professor Linda Chisholm, who is considered a prominent academic in the education policy field of South Africa, is well known for her role as chair of the Review Committee, as previously discussed. The Review Committee was responsible for revising Curriculum 2005 and was part of the process in the creation of the Revised National Curriculum Statement (RNCS) (Chisholm, 2003:1). Her analysis is considered reflective, as it provides insights to the context, the role players, and the discourses in education policy during this time.

Christie (1997), on the other hand, performs a comparative study between OBE policy in South Africa and Australia. She takes on a positivist approach in that she considers the global, macro-economic influences on education policy construction in South Africa and Australia and scrutinises the concept of “homogeneity of education systems” as termed by Dale (1994). Christie’s (1997:66) also did a conceptual analysis of “the interplay between global and local contexts”, especially in terms of classifying competence-based and outcomes-based initiatives.

Cross *et al.*’s (2002) approach to education policy analysis, discussed under the theme of curriculum reform, is evaluative of policy outcomes, evaluating how government, and certain stakeholders in education policy, have responded to tensions that have been created by the curriculum reform through outcomes-based education (Cross *et al.*, 2002:171). To some extent, Cross *et al.*’s (2002) analysis also offers a critique of government’s choice of the OBE curriculum. Cross *et al.* (2002:182) also place emphasis on the role of the context that was set, the lack of policy experience and expertise, and a shortage in skills and training, all of

which are significant in shaping what came to be Curriculum 2005, and are problems that seem to have contributed to a deficiency in policy implementation processes. Their argument (2002:172) is that curriculum reform requires a certain level of skills, both technically and politically, which the new government did not have access to – despite various initiatives pre-1994 election that were thought to be able to deal with such issues.

Engelbrecht (2006:253) approached her analysis from an implementation evaluation viewpoint. The purpose of her work is to emphasise the negative impact of “multifaceted societal changes” on the implementation of inclusive education policy (Engelbrecht, 2006:253). The analysis also demonstrates the philosophy of inclusive education in relation to promoting “democratic values of equality and human rights and the recognition of diversity” (Engelbrecht, 2006:253).

The analysis by Lomofsky and Lazarus (2001:303) was guided by policy development in terms of its association with “universal principles”, such as “human right to basic education, equality, and the recognition of the democratic rights of parents, teachers, and all learners, including those with disabilities”. Their analysis therefore focuses on the evaluation of policy development and implementation in the South African context (Lomofsky & Lazarus, 2001:303). They place special emphasis on the implementation of policy recommendations that have been made for inclusive education (Lomofsky & Lazarus, 2001:303).

While the above-mentioned literature only offers a few examples of approaches in education policy analysis in South Africa, it is clear that there is a dominance of critical evaluation of policy proposals, as well as of policy implementation and outcomes. This falls in line with conventional forms of analysing policy, as discussed by Howlett *et al.* (2009). This form of analysis may offer critique of education policy choices and is mostly aimed at providing solutions or alternatives. It does not, however, challenge the way in which meaning is constructed within the education policy discourses in South Africa that come to define ‘problems’ that should be dealt with.

#### **2.4. The unconventional approach: WPR**

Bacchi’s work introduced post-structuralism and social constructivism to policy studies (Goodwin, 2012:25), with a focus on knowledge practices and power relations. These are the philosophical underpinnings of her work. The WPR approach contributes to reflexive policy

analysis, therefore encouraging analysts to be observant to their own categories of analysis and taken-for-granted assumptions and beliefs (Goodwin, 2012:26). Bacchi, as a result, encourages researchers to acknowledge their philosophical underpinnings and beliefs in their policy research and analysis, as this contributes to their understanding and interpretation of problem representations.

WPR is different to traditional forms of policy analysis because the approach allows the analyst to be “actively engaged in the value conflicts involved in the problem representation” (Bacchi, 1999:31). “It also questions the presumptions among political rationalists that analysts can stand back from their values and commitments, and subject them to critical scrutiny”. Bacchi’s approach allows for a deeper investigation into the representation of problems. Researchers are able to discover both explicit and implicit meanings of problems, and this “diagnosis of the ‘problem’” is what Bacchi (1999:1) refers to as “problem representations”. For Bacchi (1999:1), the “identification and assessment of problem representations” are the most essential parts to policy analysis. Bacchi (1999:1) describes the approach, as “WPR analysis is to read policies with an eye to discerning how the ‘problem’ is represented within them and to subject this problem representation to critical scrutiny”. The point of the analysis is to begin with ‘solutions’, which are what policy documents are developed for.

The best way to understand the purpose of Bacchi’s (2009) approach, is to consider the work she has done using the WPR approach, most of it being on affirmative action. Bacchi (1999) contrasts the WPR approach to conventional approaches, by applying it to topics that aim to resolve ‘women’s inequality’. Her work shows that discourses on equity are shaped around women being discussed as ‘disadvantaged’ (Bacchi, 1999:204). Bacchi (1999:203) argues that “women are encouraged to develop the ‘skills’ to fit into existing workplace structures”. At the same time, these “workplace structures” will determine women’s skills as “useful to the market”, ignoring women’s abilities for “pay equity” (Bacchi, 1999:203). Bacchi (2009:67) also shows that the dominance of women as ‘disadvantaged’ in the labour market within policy discourses hides men’s advantage within the labour market.

Bacchi (2004:128) analysed debates about affirmative action (sometimes referred to as positive action), to understand the effectiveness and limits put on analysing policy by discourse approaches. Bacchi (2004:128) shows that a specific “understanding of affirmative

action as preferential treatment has become hegemonic”. In this instance, Bacchi (2004:128) challenges the conceptualisation of affirmative action, looking at its “dominant characterisation” within policy discourses.

Bacchi (2004:128) questions those who oppose affirmative action, using it within a “preferential treatment” framework, which has been harmful for those affected by the policy proposals. The other discourses surrounding affirmative action are those that are concerned with it in terms of social justice (Bacchi, 2004:129). The point of Bacchi’s (2004:129) analysis is to determine how certain ideas and views come to dominate the policy discourse and go unchallenged. In a similar example explaining the WPR approach, Bacchi (2012:21) states that “if forms of training are recommended to improve women’s status and promotion opportunities, the implication is that their lack of training is the ‘problem’, responsible for ‘holding them back’”. Bacchi (2012:23) emphasises that stated ‘problems’ and ‘solutions’ are overloaded with meanings, which would make ‘problems’ not fixed concepts for developing policies. Therefore questioning ‘problems’ is part of a critical analysis practice to understand the ‘meanings’ behind such ‘problems’ (Bacchi, 2012:23). Bacchi (2012) emphasises that these meanings that have been constructed around affirmative action and the policy proposals, have framed women in a problematic way. In other words, how affirmative action has been portrayed explained a great deal about what is understood as the ‘problem’ (2009:xiv).

Therefore, Bacchi’s (1999:199) WPR approach challenges conventional policy approaches, in that it emphasises that “‘problems’ do not exist out there, in the social world, waiting to be addressed and ‘solved’, but that ‘problems’ are created by the policy community”. Simply put, policy proposals all contain ‘diagnosis’ of a problem, which is to be attended to or changed. The WPR approach offers support in recognising the frameworks used to interpret social ‘problems’ (Bacchi, 1999:199).

## **2.5. Chapter Summary**

This chapter provided an analysis of the contexts, which has framed South African education policy, identified by the researcher as regime change and socio-economic inequality. Furthermore, the researcher has presented an analysis of key themes within the education policy literature. The approaches that have been used by education analysts to analyse basic education policy in South Africa have also been discussed briefly. Finally, the chapter

discussed Bacchi's (2009) WPR approach and how it is different from conventional policy approaches. It also explained on how Bacchi (1999) has applied the WPR approach to her own analyses.

According to Bacchi (1999:5), "problems" can become 'things' that are dealt with only by professionals, such as politicians or psychologists, for example. This is commonly known as a top-down approach, where government officials and public servants make policy without the recognition of the situation on the ground. Top-down approaches can be due to people within society believing, as individuals, that they cannot affect change or decisions to be made. The literature seems to indicate this trend, in that it is mostly the Department of Basic Education and politicians that develop solutions and classify problems. While there might be input towards policy – such as curriculum policy – from external experts, it is only one area of education policy where different perspectives provide input. The literature is also scant in providing the role of society in addressing the stated problems. As citizens, whether learners, parents, principals, or community members within a school district, there is a lack of recognition of individual responsibility when it comes to education. The role of teachers is possibly the most elaborate theme, in that teachers have been viewed as key role players within the policy process but have also been associated with many of the issues identified in the literature.

## Chapter 3: Research methodology and analytical tool

This chapter will discuss the research methodology, which has been identified as a qualitative approach, and the analytical tool that was used to analyse basic education policies. Data, in the sense of the thesis, consists of basic education policy documents that were selected for analysis. These policy documents are all publicly-available documents, which include, the *White Paper on Education and Training of 1995*, the *Plan of Action: Improving access to free and quality basic education to all of 2003*, and the *Action Plan to 2019: Towards the realization of schooling 2030* (finalised and published in 2015).

This chapter also discusses the philosophical underpinnings that motivated the direction of the thesis. These are identified as post-structuralism and postmodernism. In this chapter, the importance of the researcher's interpretation and understanding through the identified philosophies is emphasised. This chapter furthermore shows how these philosophies are related to the analytical tool, which is Carol Bacchi's "What's the problem represented to be?" (WPR) approach. This chapter will therefore discuss the philosophical underpinnings to the research, address the use of a qualitative approach, and finally, it will explain the WPR approach as an analytical tool.

### 3.1. Research methodology

The approach to research methodology undertaken in the thesis is qualitative and will be the focus of this section. Qualitative approaches are commonly characterized through the written and spoken words, such as interviews and focus groups, which illicit human experiences that are then analysed (Bless, Higson-Smith & Sithole, 2013:340). Qualitative research has elicited vigorous debate among researchers in terms of its conceptual framework and how it is classified as qualitative research (Hammersley, 2013:9). There are several traditional definitions associated with qualitative research. Bryman (2008:366), for one, describes it as "a research strategy that usually emphasizes words rather than the quantification in the collection and analysis of data". Conferring to this definition, Alasuutari (1995:7) describes that a qualitative analysis consists of an intellectuality that can be equivalent to that of solving riddles.

According to Hammersley (2013:9), qualitative research, affording its historical roots, has

been known to exist due to its opposition to quantitative research. However, Hammersley (2013:9) also emphasises that it has evolved since and has become a complex approach to research due to its many features. For Hammersley (2013:21) a working definition of qualitative research approaches is the consideration of the choice of methodological philosophy. Hammersley (2013:21) explains that qualitative research, as an approach, is therefore an umbrella term for research that has no method, which requires quantified data to be collected.

According to Bless, Higson-Smith and Sithole (2013:15), qualitative research methods emerged due to the philosophical belief that “truth is relative and that knowledge is constructed by human beings”. This is structured around the belief that how we understand things “is a product of our personal assumptions, biases and prejudices”. The qualitative aspect of the research is highlighted in the attempts to “investigate a problem”, while considering those that are affected by the problem (Bless, Higson-Smith & Sithole, 2013:16). It also feeds into the analytical tool developed by Bacchi (1999), which was applied to the policy analysis.

### **3.2. The philosophical underpinnings**

The identified philosophical underpinnings have an influence over the approach taken during the research period, the topic of discussion, how data was analysed, and finally, how the research is presented. They are also directly related to the assumptions that are made about the research question and its findings. The philosophical underpinnings discussed here, were largely influenced by Carol Bacchi’s (1999) “What’s the problem represented to be” (WPR) approach, which takes on a post-structuralism perspective, but is not only influenced by this research philosophy.

Over the course of qualitative research, various philosophical underpinnings have come to specifically be part of qualitative research approaches specifically. Duberley, Johnson and Cassell (2012:16) dynamically describe our philosophical underpinnings to research as “heuristic devices that help to structure our understanding”. All researchers have a set of rules, beliefs and morals that encourage them to pursue research in the first place, but these heuristics also determine how the research is pursued. It is therefore important to emphasise that this thesis is not only motivated by the philosophical underpinnings of the researcher but also by how these philosophies motivate the answering of the research question. The research

is therefore based on the researcher's interpretation of the education policy documents analysed. Making use of the WPR approach supports the basis of the research question and supports interpretations made.

The most noticeable philosophies through which the thesis is constructed are that of postmodernism and post-structuralism. For Agger (1991:112) these two philosophies, although overlapping tremendously, are still distinguishable, even though many theorists do not distinguish between the two. Both these philosophies, according to Agger (1991:106), though hugely debated within literature, are growing within various fields of research.

Postmodernism is a theory associated with society, culture, and history, first acknowledged by Foucault, Barthes, Lyotard and Baudrillard (Agger, 1991:112). Adherents to postmodernism consider that "every knowledge is contextualised by its historical and cultural nature" (Agger, 1991, 117). Therefore "different subject positions cannot be measured against each other" (Agger, 1991:117). Agger (1991:117) uses oppression of women and people of colour as an example, and states that it is more important to consider the discourses and practices that both oppressed groups may experience, than to compare the degree of oppression. Therefore, "postmodernism rejects the project of a universal social science", as groups of people, who may encounter the same event, will convey different experiences (Agger, 1991:117). The postmodernist aspect is the consideration of multiple perspectives (Agger, 1991:116), or different representations of 'the problem'.

Agger (1991:112) explains that post-structuralism is a theory of language and knowledge, first acknowledged by Derrida (1976) and French feminists. The post-structuralist side of the research thesis is represented through the knowledge structures that arise from categorising and placing relevant information into themes. The knowledge structures are recognised through concepts or conceptual definitions of what is perceived to be a fact. In the literature review for example, the themes were identified due to common knowledge structures that were visible. These knowledge structures also create an observable pattern where literature discourses with the same or similar concepts, can be put under one theme.

The philosophy of post-structuralism is linked to the philosophy and theoretical underpinnings through which the WPR approach is designed, further supporting the decision in choosing the WPR approach as an appropriate analytical tool. Bacchi and Goodwin (2016:4) describe post-structuralism as how "attention is directed to the heterogeneous

practices, in particular knowledge practices, that produce hierarchical and inegalitarian forms of rule”. Post-structuralism places emphasis on how we are governed through rules and regulations and for Bacchi and Goodwin (2016:5) “bring into play a wide range of professional and ‘expert’ knowledge that have a significant role in how we are governed and in producing the kinds of ‘subjects we are encouraged to become’”. For post-structuralism, government is not a narrowly defined concept, but is much broader, and expands even beyond “civil society and social movements” (Bacchi & Goodwin, 2016:5).

For Bacchi and Goodwin (2016:5) emphasis is placed on Foucault’s term of ‘governance’, which refers to government as “any form of activity that aims to shape, guide, or affect the conduct of people”. Post-structuralism allows one to consider ways in which “order is maintained”, that involves the consideration of categories within which ‘things’, ‘objects’, and people as ‘subjects’ exist (Bacchi & Goodwin, 2016:6). Bacchi and Goodwin (2016:6) explain that these categories are the effects of policy and one should not think of them as “necessary and natural ways of grouping people”, allowing one to consider “how they are produced and how they translate into diverse lived realities”. Put simply, one can think of putting things into ‘boxes’ (categories), and because these ‘boxes’ have formed part of our ‘lived realities’, we presume that certain ‘things’ belong in certain ‘boxes’. Bacchi and Goodwin (2016:6) therefore emphasize that post-structuralism allows one to consider these ‘boxes’ and how they came to exist in the first place. This definition also supports the foundation of “What’s the problem represented to be?” approach, by using policy solutions, to scrutinise and question the existence of ‘problems’.

Postmodernism and post-structuralism as approaches, allow the researcher to consider multiple constructions of meanings of presented problems, and to investigate the complexities of each of these meanings (Duberley, Johnson & Cassell, 2012:26). Postmodernism and post-structuralism place emphasis on the context of the knowledge or subject researchers intend to investigate. “A key element of postmodern research has been a renewed focus on language” (Duberley, Johnson & Cassell, 2012:26). What Duberley *et al.* (2012:26) mean by this is that we ascribe meaning through language, and therefore knowledge does not exist without language. The research is therefore constructed through the researcher’s understanding and reality of the representation of problems. Therefore, the researcher’s subjective experiences have influence over the existing and new knowledge of education policy analysis.

The thesis is structured to provide critical insight into the different interpretations of South African education policy problems (or representation of problems). The research process therefore needed to include a course of action, by which the researcher could separate her own perceptions of education policy problems to understand perceptions of education issues described within education policies, and then interpret these accordingly. This was accomplished using Carol Bacchi's "What's the problem represented to be" (WPR) approach. The application of this analytical tool allowed for the researcher to go beyond expected understanding of education policy issues and led to the discovery of many underlying perceptions and expectations of education policy.

### **3.3. The initial document analysis**

Document analysis was used as part of the analytical tool as described in Bacchi's (1999) WPR approach. Document analysis includes the "systemic procedure for reviewing and evaluating" of both "organisational and institutional documents" (Bowen, 2009:28). The purpose of document analysis as described by Bowen (2009:28) is the requirement that "data be examined and interpreted in order to elicit meaning, gain understanding, and develop empirical knowledge". This was an important step to recognise and sift through the policy documents that served to solve similar 'problems'. The WPR analysis would be much more complicated to apply to policy documents that do not have the same purpose or goal.

Documents analysis as a process involves "skimming (superficial examination), reading (thorough examination), and interpretation" (Bowen, 2009:32). Document analysis is at times combined with some elements of content analysis and thematic analysis (Bowen, 2009:32). From the content analysis perspective, information is categorised according to the central research question (Bowen, 2009:32). Thematic analysis assists researchers in finding and recognising patterns, which in return, allows researchers to identify prominent themes (Bowen, 2009:32). This step allowed the researcher to narrow down the search for appropriate policy documents for the WPR analysis even further.

According to Bowen (2009:28), document analysis is "the analytical procedure" which "entails finding, selecting, appraising (making sense of), and synthesising data contained in documents". This research approach compliments that of qualitative methodologies in that the "researcher is expected to draw upon multiple (at least two sources) of evidence; that is, to seek convergence and corroboration through the use of different data sources and

methods” (Bowen, 2009:28). Document analysis is considered invaluable in this thesis due to its provision on insights regarding the background and context in which the documents (Education White Papers) are published (Bowen, 2009:29).

The initial document analysis consisted of eight policy documents published by the Department of Basic Education, including: the *White Paper on Education and Training 1995*, *National Education Policy Act No. 27 of 1996*, *White Paper 6: Building an inclusive education and training system* (2001), *National Curriculum Statement* (2002), *Improving Access to Free and Quality Education for all* (2003), *National Education Information Policy* (2003), *NEDLAC Accord on Basic Education* (2011), and the *Action Plan to 2019: Towards the realisation of schooling 2030*. The analysis was undertaken in order to accomplish five aspects that are encouraged by Bowen (2009), and to identify the policy documents to which the WPR approach would be applied. The first aspect is that the documents provide very important data on the context within which the documents were written; document analysis therefore provides insight into the framework of operation of those who participated in the development of the document (Bowen, 2009:29). The three policy documents that were chosen for the WPR analysis, identified in the introduction of this chapter, provided the most descriptive representation of the South African education system’s context and the stakeholders involved. They also shared characteristics that are pertinent to understanding the context, such as school infrastructure and the role of teachers.

Secondly, document analysis can produce “questions that need to be asked and situations that need to be observed as part of the research” (Bowen, 2009:30). Whether this information is used to generate interview questions or identify problem representations, document analysis creates the necessary space for documents to be critically evaluated and scrutinised. Documents, especially ones that are publicly available, consequently open themselves up for evaluation and critique when they are published. Due to the similarities of the three chosen policy documents, the researcher was able to identify problem representations that have been continuous during the period of 1995 to 2015.

Thirdly, the data obtained in documents can be used as supplementary data to research (Bowen, 2009:30). In this thesis, the information obtained from policy documents was initially identified through the reviewing of literature of academic journal articles about prominent education policy issues. In other words, the analysis of the kind of information

contained in policy documents, was encouraged through the review of literature. The researcher familiarised herself with what the literature emphasised as important in education policy, and from this information, she could study the policy documents. However, there are areas where policy documents and the literature were not aligned with issues. Although the literature identified themes, the analysis had to be separated from this in order to not show bias towards certain issues presented within the policy documents.

The fourth aspect of document analysis can be used to track change and development (Bowen, 2009:30). It is therefore one of the most important means to track whether the development and change, mentioned in the first policy document, have occurred. Also important in the reasons for identifying the three policy documents for WPR analysis, was not only the similarity in problem representations, but how these problem representations have or have not changed or developed over the period of 1995 to 2015.

Finally, documents are used to verify certain findings or to corroborate evidence found in other sources (Bowen, 2009:30). Bowen (2009:30) suggests that when there is a divergence in the information analysed and gathered, the researcher is obligated to investigate further until information can be converged. Bowen (2009:30) emphasises that this process improves the confidence and trustworthiness of the research findings. During the first phase of the thesis, many of the documents sourced in journal articles, especially documents referencing Curriculum 2005 or C2005, were unobtainable. This resulted in the researcher being unable to verify references that made use of the C2005 document, as it no longer exists on government websites. The researcher therefore had to rely on information obtained in the next Curriculum policy, which was the Revised National Curriculum Statement (RNCS).

Document analysis was chosen for this thesis because it was one of the first steps towards answering the research question. It also assisted the researcher in identifying common patterns, and therefore similar problem representations, that ultimately led to the identification of the three policy documents to which the WPR analysis would be applied. It was also selected due to its cost-effectiveness, its efficiency and simplicity in design, the availability of policy documents, its “lack of obtrusiveness and reactivity”, and its broad coverage of information (Bowen, 2009:31). The researcher therefore did not have to disturb any order of the education process to obtain information. These five aspects, as presented by Bowen (2009) above, allowed the researcher to sift through eight policy documents to

identify the three documents that would be used for the application of the WPR approach. The three documents were chosen due to their similarity in the ‘problems’ to be dealt with over the period of 1995 to 2015, as well as the alignment of characteristics such as “free and quality education”, “compulsory education”, “teacher training”, and “learner performance”, to mention a few. Document analysis is also the groundwork for applying Bacchi’s (1999) WPR approach.

### **3.4. Understanding the WPR approach**

Policies are, and have always been, recognised as documents that represent solutions to problems that have been identified within society. According to Bacchi (2009:ix) policies are programmes that indicate and motivate action to be taken by government, and therefore she describes policies as “government programmes”. Bacchi (1999:7) allows analysts to scrutinise how problems are represented within policy documents. According to Bacchi (1999:7), how problems are represented can produce “particular forms of subjectivity”, which in return can influence how we see others and ourselves. Therefore, this also determines what gets done and what does not. It is for this reason that how problems are viewed, can determine their importance and relevance for action.

Policies and policy proposals contain explicit (clearly defined) problems, and secondly, implicit (implied) representations of what is considered to be the problem. When studying policy documents, critical thinking insights such as Bacchi’s (1999) WPR approach, provide a means to see beyond the explicit policy representations of problems and the suggested solutions only. Bacchi’s (1999) analytical tool therefore generates an analysis of the implicit problem representations as well. Bacchi (2009:1) explains that when examining a specific policy there is a particular way in which a ‘problem’ is understood, ‘problems’ are of a particular sort, and therefore presented within the policy. Bacchi (2009:1) emphasises, “the way in which the ‘problem’ is represented carries all sorts of implications for how the issue is thought about and for how the people involved are treated, and are evoked to think about themselves”. Therefore, highlighting the ways in which problems are presented are important for understating the type of problem being addressed.

“[We] need to shift our analysis from policies as attempted ‘solutions’ to ‘problems’, to policies as constituting competing interpretations or representations of political issues” (Bacchi, 1999:2). Here analysts are motivated to look deeper into the implicit meanings of

problems by analysing the solutions. For Bacchi (1999:2) solutions that are represented in policy documents, when critically analysed, are actually interpretations and therefore representations of an individual or group's (government for example), understanding of public issues. The implication, as Bacchi (1999:2) suggests, is that other interpretations of these issues go unnoticed or undiscussed, as the individual or group's interpretation of the issue is more prominent and therefore gains more support. Bacchi (1999:2) encourages the recognition of the other interpretations of issues since these can provide better understanding and diverse ways of approaching public issues.

“The focus on interpretations or representations means a focus on discourse, defined here as the language, concepts and categories employed to frame an issue” (Bacchi, 1999:2). This has much to do with how problems are conceptualised in the public discourses where they gained support to become dominant representations of problems. Complex language (jargon) and confusion in conceptualisation, can not only make issues difficult to understand within public discourses (at the expense of excluding certain individuals and groups with different interpretations), but can also influence how these issues are framed within policy documents (Bacchi, 1999:2). An example would be the case of the transition from apartheid syllabus to Curriculum 2005. Teachers could not interpret this policy document, because they were largely excluded from public discourses about outcomes-based approaches to education. Not being part of the process of discourse about issues in education, therefore meant that teachers across the country had different interpretations of what was to be achieved by the new system.

Referring back to policies as action to be taken regarding certain public issues (government programmes), the assumption is that policies are designed to fix the identified issues (Bacchi, 2009:ix). According to Bacchi (2009:ix), “most government policies do not officially declare that there is a problem that policy will address and remedy”. In other words, problems are not clearly stated, and therefore assumptions can be made about what is being addressed within policy documents, or as Bacchi (2009:x) states, the problems are “implied”. The very nature of a policy proposal “implies” that there is action that “needs” to be taken, and this establishes what Bacchi (2009:ix) refers to as an “implied ‘problem’”. ‘Problems’, as referred to by Bacchi (2009:xi) (and within this analysis), “refers simply to the kind of change implied in a particular policy proposal”. This level of analysis is where the WPR approach intervenes,

as analysts aim to make those ‘problems’ that are implicit within policy, explicit so that they can be examined critically (Bacchi, 2009:x).

There are the six questions that are posed by the WPR approach (Bacchi, 2009:x). The analysis of policy documents in this thesis was done on the basis of the first three questions selected from Carol Bacchi’s (2009) WPR approach, namely; “What’s the problem represented to be in a specific policy or policy proposal?”, “What presuppositions or assumptions underpin this representation of the ‘problem?’”, and lastly “How has this representation of the problem come about?”. The thesis only deals with these three questions since the sole purpose is only to establish the problem representations within basic education policy and to critically analyse these problem representations.

### **3.4.1. Questions of the WPR approach**

In the analysis, each policy is analysed separately. However, each question will discuss the problem representations of all three of the policy documents together. It is important to clarify that this analysis, using Bacchi’s WPR approach as an analytical tool, is not intended to present solutions for policies, their constructions, or to give evidence of success or failure of education policies in South Africa, but to establish how problems are represented, the implications of such representations and the effects thereof. It will therefore do exactly what Bacchi (2009:13) intended for the WPR’s use, “to interrogate representations, offered by members of the policy community, broadly defined, of a range of political issues”.

#### **3.4.1.1. “What’s the problem represented to be?”**

This question is viewed as a “clarification exercise” (Bacchi, 2009:2), which allows one to identify implicit problem representations (Bacchi, 2009:2). Bacchi (2009:2) describes the exercise as “since how you feel about something determines what you suggest doing about it, it is equally true to say that looking at what is proposed as policy intervention will reveal how the issue is being thought about”. This requires analysts to work backwards from what is stated as ‘solutions’ within policy documents and taking these solutions “to reveal what is represented to be the ‘problem’” within the policy documents (Bacchi, 2009:4).

The purpose of the exercise according to Bacchi (2009:3) is to move away from the assumptions that policy-makers are the only ones who can fix and attend to public issues and that “problems sit outside the policy process, waiting to be addressed and fixed”. Here

analysts are required to work backwards by looking at the “concrete proposals” as a means to find “what is represented to be the problem” (Bacchi, 2009:3). Policy documents, more often than not, will contain more than one proposal, and therefore there might be more than one problem representation (Bacchi, 2009:4). When more than one proposal is present, it can seem too complicated to identify problem representations, Bacchi (2009:4) suggests looking at where funds are allocated to assist in identifying “dominant problem representations”.

#### **3.4.1.2. “What presuppositions or assumptions underlie this representation of the problem?”**

This question aims to develop an understanding of what has been identified as problem representations (Bacchi, 2009:5). Here Bacchi (2009:5) points the focus to asking questions such as: “What is assumed? What is taken for granted? What is not questioned?”. Bacchi (2009:5) explains that the term “presuppositions” refers to “background ‘knowledge’ that is taken-for-granted”, in other words, the “epistemological and ontology assumptions” (methodological and conceptual assumptions) (Bacchi, 2009:5). When these have been considered, according to Bacchi (2009:5) one can now “identify the conceptual premise (conceptual logics) that underpin specific problem representations”. The idea here is not to identify the assumptions or beliefs that belong to policy makers, but rather the assumptions that are elicited by the problem representations as they are read within policy (Bacchi, 2009:5).

This question also reveals certain “rationales” behind the policy document, as well as “deep-seated presuppositions underpinning the proposed change” (Bacchi, 2009:x). These rationales have to do with the type of thinking that lies behind the problem representations, in other words, establishing what is the preferred way of thinking about something (concept) (Bacchi, 2009:6). Connected to this, the section can lead analysts to establishing the binaries and key concepts, leading to a deeper analysis “to identify how meaning is created” (Bacchi, 2009:7). The binaries are described as one side being privileged at the exclusion of the other (Bacchi, 2009:7). Key concepts are explained as “abstract labels” that are filled with various meanings (Bacchi, 2009:8). The WPR approach requires analysts to recognise key concepts within the identified problem representation, and to establish the meanings that are ascribed to these concepts (Bacchi, 2009:8).

Finally, this question requires analysts to identify the categories (also defined as concepts) that play an integral role in the governing process (Bacchi, 2009:9). Bacchi (2009:9) uses examples such as “age categories, zoning categories, disease categories, gender and sexuality categories”. However, Bacchi (2009:9) stresses that the analysis places more emphasis on “people categories”, due to their importance within the governing process. These categories are identified as, for example, “youth”, ‘single mothers’, ‘the homeless’, ‘tax-payers’, ‘students’, ‘welfare dependents’, ‘citizens’”. The analysis requires the same in-depth analysis of “people categories” as it does with “binaries” and “key concepts”, so that one can establish their role in providing specific meaning to problem representations (Bacchi, 2009:9).

#### **3.4.1.3. “How has this representation of the ‘problem’ come about?”**

According to Bacchi (2009:10), this question allows one to reflect on two parts that are connected. Firstly, there should be a consideration of the “developments and decisions (the non-discursive) that contribute to the formation of identified problem representations” (Bacchi, 2009:10). Secondly, Bacchi (2009:10) emphasises that policies could have been developed quite differently had there been consideration of competing problem representations that exist across time and space.

The question is based on the genealogical approach, as introduced by Foucault (Bacchi, 2009:10). This requires analysts to start in the ‘present’ and work backwards from this to establish how the ‘present’ situation was established in the first place (Bacchi, 2009:10). Through this one can establish ‘the roots’ in order to “upset any assumptions about ‘natural’ evolution” (Bacchi, 2009:10). The ‘natural’ evolution implied here refers to the assumption that “current practices and institutions, and the ways ‘problems’ are understood, are the inevitable product of ‘natural’ evolution”, thus ignoring the “twists and turns” often found within the ‘history’ of current problems (Bacchi, 2009:10). For this reason, Bacchi (2009:10) emphasises that “by identifying specific points in time when key decisions were made, taking a particular issue in a particular direction, we can see that the problem representation under scrutiny is contingent and hence susceptible to change”. In other words, this section will “highlight the conditions that allow a particular problem representation to take shape and to assume dominance” (Bacchi, 2009:11). Power relations also play an important role within this section, in terms of role-players or groups that have greater influence than others, and therefore ensure that certain problem representations assume dominance (Bacchi, 2009:11).

### 3.4.2. Using the analytical tool: applying the WPR approach

The researcher's first step was to analyse the selected basic education policy documents and identify and list both the explicit and implicit problems. From this list, problem representations are identified. The problem representations that are identified are then put under critical investigation.

As previously stated, the literature reviewed revealed certain dominant themes that identified issues within education policy that, over the period of 1995 to 2015, were most popular in public discourse. These themes were then individually studied and analysed to understand their importance to education policy. The contexts were identified as regime change and socio-economic inequalities and set the scene for education policy within which the analysis occurred. This led the thesis into an initial document analysis of basic education policy. After this document analysis, three basic education policy documents were selected due to their similarity in discussion of issues. These education policies also represent specific points in time, politically and socially, within the contexts of regime change and socio-economic inequality in South Africa. The three basic education policy documents were then analysed by using Bacchi's (1999) WPR approach. The basic education documents were the *White Paper on Education and Training of 1995*, the *Plan of Action: Improving access to free and quality basic education to all of 2003*, and the *Action Plan to 2019: Towards the realization of schooling 2030* (finalised and published in 2015).

The researcher found that, at times, identifying the problem representations were difficult. It was also difficult, on occasion, to interpret and to conceptualise terms because of the many discrepancies that accompany such terms. Policy makers sometimes assumed that their readers understood the meaning behind the explanations and interpretations of issues, which in many cases, were vague. Following the advice of Bacchi (2009), the researcher started the analysis, to identify problem representations, by looking at the financial sections first. According to Bacchi (2009) starting with the funds is an indication of what government action is to receive the most attention.

The researcher first identified explicit 'problems', and then looked at the proposed solutions to these explicit 'problems' to identify the implicit 'problems'. After these were identified, the researcher applied a critical analysis to problem representations by stating the underlying assumptions, and in some cases looking at what is undiscussed. As one will note in chapter

four, there are areas where the researcher supported certain ‘undiscussed’ issues through discourses within literature. An important part of the research process was for the researcher to not only consider her own interpretations, but also those of others. The final step was to discuss the ‘roots’ of the problem representations, and the researcher came to the conclusion that the problem representations stem from the same ‘roots’.

### **3.5. Chapter Summary**

This chapter discussed the philosophical underpinnings to the research, the research approach (as qualitative in approach), and the analytical tool. The chapter discussed the importance of a qualitative approach to the thesis, and how it is synchronised with the analytical tool. The chapter emphasises why document analysis was important for the thesis, especially in the initial phases of analysing education policy documents, and how applying Bacchi’s (2009) analytical tool is central to answering the research question.

Key to Bacchi’s (2009) analytical tool is that it assisted in the construction of an appropriate research question that would allow for clarity and emphasis on problem representations in South African basic education policies. Also, important to applying Bacchi’s (1999) analytical tool, is that it directed the researcher towards the philosophical underpinnings of the thesis. The researcher also emphasised the complexity of understanding and interpreting policies. Bacchi’s (1999) analytical tool made this process somewhat easier, but most importantly, it took the thesis beyond its initial discoveries.

## **Chapter 4: The findings of the WPR analysis**

This chapter will analyse Basic Education policy by applying Carol Bacchi's (1999) (2009) "What's the problem represented to be?" (WPR) approach. The policy documents that are analysed, as identified in chapter three, are the *White Paper on Education and Training of 1995*, the *Plan of Action: Improving access to free and quality basic education for all*, and lastly, the *Action Plan to 2019: Towards the realisation of schooling 2030*. The first three questions identified in Bacchi's (2009) analytical approach (WPR), will be applied to these three policy documents. The chapter will first provide an overview of each policy document, followed by the analysis of the policy documents, and the identified problem representations.

### **4.1. Introduction: The Department of Basic Education**

As mentioned previously, the Department of Basic Education was formed in 2009 when the Department of Education split into the Department of Basic Education (DBE) and the Department of Higher Education (DHE). The DBE is responsible for all schools providing education from Grade R to Grade 12, as well as adult literacy programmes (Department of Basic Education, 2018). According to the DBE, their aim is to "develop, maintain and support a South Africa school education system for the 21<sup>st</sup> century" (Department of Basic Education, 2018). Under the DBE (Department of Basic Education, 2018), policies are divided into "Access to schools", "School management", "School Funding", and "Curriculum and Assessment". Separate categories exist for White Papers, Acts, legislation, and publications. In the policy analysis, documents were drawn from the White Paper category, the "Access to schools" category, and the publications category, in the order that the three policy documents are listed.

### **4.2. Policy Document Overview**

This section gives a brief overview of each policy document analysed. It also discusses the contexts (as determined in chapter two) within which each of the documents has been framed. The policy documents were selected by the researcher because of the overlap in issues that are being addressed and the similarity with regards to the contexts.

#### 4.2.1. White Paper on Education and Training of 1995

The first policy analysed is the *White Paper on Education and Training of 1995*, the first education policy of the new democratic dispensation. From the introduction of the policy it is evident that the context for this policy document is that of regime change, noting the drastic transformation interventions that are pointed out throughout the policy document. Later, the document brings in socio-economic inequality as a context that needs redress. It is clear in the introduction that apartheid education is problematic to the democratic context, and that the new system had to abide by the requirements of the constitution and encourage human rights. The policy document focuses mostly on how the education system should be transformed under the new government.

The policy document is divided into six respective parts. These include: an introduction, the Reconstruction and Development of the Education and Training Programme, the Constitutional and Organisational Basis of the New System, the Funding of the Education System, Reconstruction and Development in the School System, and the conclusion (Republic of South Africa 1995, i). Each of these parts consists of chapters that discuss relevant elements of education policy of this period in time. Key elements will be discussed and analysed as they relate to answering the research question. It should also be noted that not all elements of the policy document will be discussed, not as a result of their unimportance, but due to the basis of Bacchi's (2009:4) advice to look at funding targets in order to establish dominant problem representations. The *White Paper* discusses a vast number of issues that are to be addressed, and to filter through all of the issues and proposal stated, only the dominant problem representations are considered for the purpose of this thesis.

Within the *White Paper on Education and Training 1995*, the Funding of the Education System assisted in identifying dominant problem representations (Republic of South Africa 1995, 53). The proposal indicates that budgets for the financial year 1995/1996 fell short of the demands of education needs. The government therefore proposed a section of "demand factors" for the budget process for the 1996/1997 financial years. The approach to fund allocation and budgeting was purely developmental. The "demand factors" for budget allocation was identified as follows: "Redress and rehabilitation", "Extended and new services", "Demographic factors", and "Rationalisation" (Republic of South Africa 1995, 58-

9). Each of these is descriptive of areas that are being targeted through additional funds for various reasons. This was the basis for analysing the *White Paper* since the policy proposal contained numerous problem representations; these factors were recognised as the dominant problem representations.

#### **4.2.2. Plan of Action: Improving access to free and quality basic education for all**

The *Plan of Action: Improving access to free and quality basic education for all* (Republic of South Africa 2003) is a policy document that focuses on how quality is guaranteed (through various legal frameworks), the obstacles facing access to quality education, and how quality has been implemented thus far. The policy also focuses on compulsory education, the work and policies drafted to extend compulsory years to include Grade R learners, but most importantly, how it forms “the cornerstone of modern, democratic society” (Republic of South Africa 2003, 4). Through analysis of this policy document it is clear that it was framed to address the legacy of the past, as well as socio-economic inequality, since emphasis was placed on free access and quality education for the poor.

The policy looks at South Africa’s responsibility as signatory to the Dakar Framework for Action of 2000 (Republic of South Africa 2003, 4). In relation to the Dakar Framework, the issues identified involving poverty are discussed, and how an appropriate solution should be provided through the delivering of Basic Education for all, which would be compulsory (ages seven to 15). The core issues that are dealt with within the policy are: “Personnel inputs and the curriculum”, “non-personnel non-capital inputs (NPNC)”, and “school infrastructure and the question of access to schools” (Republic of South Africa, 2003:9).

#### **4.2.3. Action Plan to 2019: Towards the realisation of schooling 2030**

The Action Plan to 2019 is a reiteration of *Action Plan to 2014: Towards the realisation of Schooling 2025* (Republic of South Africa 2015, 8). The only difference between the two policy documents is the shift in priorities as per the National Development Plan (NDP) that was released by the president in 2012 (Republic of South Africa 2015, 8). The Action Plan is to be implemented by 2030 with the medium-term goals to be reached by 2019 (Republic of South Africa 2015, 8). The policy states that the plan is directed at specific stakeholders and is aimed at them due to their involvement in transforming South African schools (Republic of South Africa 2015, 8). These stakeholders include: “parents, teachers, school principals,

officials at the districts, provincial and national levels, members of Parliament, leaders in civil society organisations, including teacher unions, private sector partners, researchers, and international partner agencies such as UNICEF and the World Bank” (Republic of South Africa 2015, 8).

The *Action Plan of 2019*, like the 2011 Action Plan, deals with 27 goals – 13 goals are performance and participation outcomes-related, and 14 are initiatives to “realising these improvements”, and are action-related (Republic of South Africa, 2015:8). The *Action Plan of 2019* is completely aligned with the NDP (Republic of South Africa, 2015:8). The first section deals with post-apartheid schooling. The NDP states that education should play “a greater role in building an inclusive society, providing equal opportunities and helping all South Africans to realise their full potential, in particular those previously disadvantaged by apartheid” (Republic of South Africa, 2015:8). The second section is proposals and recommendations for the 27 goals to be achieved. Similar to the *Plan of Action*, this policy is targeted specifically at addressing socio-economic inequalities.

### **4.3. The implicit problem representations in Basic Education Policy and the underlying assumptions**

All three policy documents contained numerous problem representations. It was therefore important to establish the dominant problem representations. As mentioned under section 4.2.1, the *White Paper* was analysed through identifying where funds would be allocated. For the *Plan of Action*, dominant problem representations were easier to find than the *White Paper*, since the target areas were named explicitly. The *Action Plan for 2019* presented similar patterns of recognition to the *Plan of Action*. Some goals, contained in the *Action Plan to 2019*, explicitly stated what the problems were, while other goals were stated as achievements and improvements, providing statistical data, but presentation of issues to be addressed.

There were six distinct patterns identified across the three documents, namely: the provision of physical infrastructure, compulsory and free education, management of the system and learner performance, early childhood development, teacher training and job satisfaction, and the legacy of the past and inequality. In presenting the findings, it is important to note that the two questions of “What’s the problem represented to be?” and “What presuppositions or assumptions underlie this representation of the problem?” have been combined for better

demonstration of the respective problem representations. The following sections will discuss each of these patterns, as well as their assumptions.

#### **4.3.1. The provision of physical infrastructure**

Within the *White Paper*, the “Redress and rehabilitation” factor is concerned with the “shortfall of school classrooms” (Republic of South Africa 1995, 58). In 1994, the estimated number of classrooms that were needed for the new system, and the enrolment of all South African learners into this system, was between 50,000 and 65,000 (Republic of South Africa 1995, 58). Other funds would also have to be allocated to rehabilitation costs for the maintenance of old infrastructure that were either under-maintained or vandalised. In the *White Paper* there is reference to this under free education. The stated solution is that the provision of basic infrastructure (classrooms, toilets, and electricity) should be realised in order for free education to be achieved (Republic of South Africa 1995, 78). It is also mentioned as part of the physical provision of education. The explicit representation of the problem here is that there is a shortage of classrooms, school buildings and physical provisions. This implies that education will not happen unless there is adequate physical infrastructure in place. The implicit representation of the problem is that education cannot exist outside of good infrastructure, or provision of good classrooms (namely good buildings and physical provisions).

In the *Plan of Action*, the school infrastructure is addressed within its “capital investment and policy plan” (Republic of South Africa 2003, 21). The policy proposal suggests targeting funds to physical infrastructure that will “most effectively and most rapidly” address the barriers to quality schooling in both poor and rural areas, where there are tremendous backlogs (Republic of South Africa 2003, 21). The explicit representation of the problem here is that the physical infrastructure is a barrier to quality schooling in both poor and rural areas. The policy proposal implies that physical infrastructure is associated with the quality of education. The implicit representation of the problem is that quality education can only exist within the physical infrastructure of schools.

In the *Action Plan to 2019*, goal 24 deals with school buildings and facilities (Republic of South Africa 2015, 44). The introduction of the Accelerated Schools Infrastructure Delivery Initiative (ASIDI) in 2013 focuses on school buildings that require complete replacement (Republic of South Africa 2015, 44). The goal states that physical infrastructure and the

environment should encourage learners to *want* to come to school and learn, and for teachers to *want* to teach. Here, the explicit representation of the problem is that the physical infrastructure and the environment is not encouraging learners to *want* to come to school, and teachers to *want* to teach. This implies that learners only *want* to learn when the buildings and infrastructure are in place, and that teachers only *want* to teach for these reasons. This implies that learners' 'wants' of receiving education are determined by the physical infrastructure, and the environment, within which that education is received. The same is implied for teachers: teachers' 'wanting' to teach is associated with the physical infrastructure within which they must teach. The implicit representation of the problem is therefore that learning and teaching can only happen within the provision of physical infrastructure.

The underlying assumptions to be made about the above-mentioned problem representations (explicit and implicit representation of problems), is that education mainly occurs within a school building. This building contains adequate provision of toilets, electricity, classrooms, laboratories, libraries, and computer rooms. As Bacchi (2009:6) suggests, there are certain rationales (for example "particular styles of governing" that are preferred) that underlie certain representations of a 'problem'. The rationale in this instance, would therefore be that for decades, even under the apartheid regime, education occurred within the school buildings. Therefore, the underlying assumption is that receiving education within the school building is the preferred way for schooling to take place. It can also be noted that the key concept within the first policy proposal is 'education', and it is given meaning through physical provisions. Within the second policy proposal, the key concept is identified as 'quality', and is also given meaning through the provision of physical infrastructure. The same applies for the third policy proposal, where the key terms of 'teaching' and 'learning' are given meaning through the provision of physical infrastructure.

According to Bacchi (2009:7), policy proposals also contain binaries (two parts that exist, one usually at the exclusion of the other). In the above problem representations, there are the binaries associated with good and bad infrastructure. These binaries indicate that good infrastructure is at an advantage, and the policies assume that good infrastructure is directly associated with the quality of education received, the quality of teaching that takes place, and that learners will want to learn when there is good infrastructure in place. This leaves bad infrastructure at a disadvantage, with no quality education, teachers not wanting to teach, and learners not wanting to learn.

### 4.3.2. Compulsory and free education

Within the *White Paper*, the factor of “Extended and new services” is related to the government’s Reconstruction and Development Programme (RDP). The focus here is the introduction of “free and compulsory general education”, “the culture of learning programme”, “the Adult Basic Education and Training Programme”, “the Early Childhood Development programme” (discussed under section 4.3.4), “expanding training capacity in technical colleges”, “community colleges and technikons”, “special education needs programme”, “enhanced pre-service and in-service teacher education” (discussed under section 4.3.5), “enhancing the quality of university and technikon programmes”, and finally, “a tertiary student loan/bursary facility” (Republic of South Africa 1995, 59).

The “culture of learning programme” during this time was a Presidential initiative and not much else is said about it in the policy document. “Free and compulsory education” is associated in the *White Paper* with the provision of “ten years of free and compulsory education” (Republic of South Africa 1995, 79). The *White Paper* discusses “free education” and “compulsory education” separately. The analysis therefore also considers these two terms as separate, with separate proposals.

According to the DBE (Republic of South Africa 1995, 76), “compulsory education” is based on the fundamental right to basic education as listed in the constitution (mentioned in Chapter 1). The *White Paper* states that compulsory education is a solution to the problem (explicit representation of the problem) of child labour exploitation (Republic of South Africa 1995, 77). This policy proposal implies that child labour is an education (or lack thereof) issue. The implicit representation of the problem here is that children become labourers due to (a lack of) education. The *Plan of Action: Improving access to free and quality basic education for all* (Republic of South Africa 2003, 4) states that “compulsory education is the cornerstone of any modern, democratic society that aims to give all citizens a fair start in life and equal opportunities as adults” and will assist in combating poverty. This policy proposal implies that without compulsory education, South Africa is not a modern, democratic society, that citizens will not have equal opportunities, and that poverty cannot be reduced. The implicit problem representation here is that citizens’ equal opportunities to life can only be provided through compulsory education, and that combatting poverty occurs through the provision thereof.

In the *Action Plan to 2019*, goal 10 proposes solutions to compulsory education (Republic of South Africa 2015, 28). This policy proposal states that compulsory education has not yet dealt with the issue of learner dropout rates (Republic of South Africa 2015, 28). It states that many learners drop out at age fifteen (the end of compulsory years), not having completed grade nine (Republic of South Africa 2015, 28), which is the explicit representation of the problem. The policy proposal suggests interventions to quality of education and the capacity of teachers (Republic of South Africa 2015, 28). This implies that the dropout rates are as a result of poor quality and lack of teacher capacity. The proposal states that teachers should have the capacity to give learners a hope for their future so that they do not fall into society ills, such as substance abuse (Republic of South Africa 2015, 28). This implies that should teachers not bring learners ‘hope’, the learners will fall prey to society’s ills, and it leaves the responsibility of preventing youth dropping out of school, to teachers. The implicit representation of the problem is that teacher capacity and quality education can prevent learners from dropping out of school.

The first assumption to be made about the above-mentioned problem representations, is that child labour is due to children either not receiving education, or not having access to it. Compulsory education in this instance, would ‘force’ children to go to school and receive education, and not become labourers. This assumption ignores certain issues surrounding child labour, such as poverty, family dynamics, economic returns of schooling for families (Edmonds, 2006:387), and societal issues (such as gangs, drugs, and violence).

The second problem representation identified, is that citizens’ equal opportunities to life can only be provided through compulsory education, and that combatting poverty occurs through the provision of compulsory education. The assumption to be made here is that compulsory education is the only means by which opportunities in life can be accessed on an equal basis. The other assumption is that poverty is an education (or lack thereof) issue. This representation of the problem assumes that people are poor because they do not have (access to) education. This representation of the problem also assumes that education, once accessed, will be of good quality.

The third problem representation identified above, is that teacher’s capacity and quality education can prevent learners from dropping out of school. This assumes that teachers can have influence over learners in the decisions that learners make, both inside and outside of

school. While teachers can have huge influence over learners in certain aspects of learning areas, there are other societal, socio-economic, and family dynamics that have larger effects on learners and their decisions to dropout, or not. Quality education is also limited in its ability to prevent dropout rates, and this is assuming that learners have access to good quality schools.

The *White Paper* describes the ideal of what free education should look like in the context of South Africa. “Free education” is provided during the General Education years – also referred as the compulsory years – and is funded by the state (Republic of South Africa 1995, 78). The policy proposal talks about “free education” in terms of certain “provisions” (Republic of South Africa 1995, 78). These “provisions” are to have good teacher to learner ratios, to have better-qualified teachers, for basic physical infrastructure to be provided for according to schools who need it most (according to the Index of Need, which is used to determine the allocation of resources made available to each public school), as well as providing “basic learning materials” (Republic of South Africa 1995, 78). The explicit representation of the problem is that “free education” can only be realised under certain “basic provisions”. This implies that “free education” cannot exist outside of these “basic provisions”. The implicit representation of the problem is, therefore, that even with all of the above-mentioned provisions, education is not free.

In the *Plan of Action* policy document, “school fees and other private inputs” are discussed in terms of free education (Republic of South Africa 2003, 25). The most prominent points discussed under this section are “fee-setting” and “fee exemptions” (Republic of South Africa 2003, 25). Under “fee-setting”, schools that fall within quintiles one and two will have to apply for Departmental approval in order to charge parents school fees. These schools provide education within the poorest districts (Republic of South Africa 2003, 25), and this is identified as the explicit representation of the problem. Under “fee-exemptions”, parents who are unable to afford school fees are exempt from paying them. This applies even more to recipients of welfare grants (Republic of South Africa 2003, 25), and provides free education only for the poor, specifically within districts that fall in quintiles one and two. This policy proposal implies that free education only exists within the poorest districts within quintiles one and two. The implicit representation of the problem is that the large majority of poor learners are therefore limited to schools that only offer free education, and they can, therefore, only attend schools within the poor districts.

The assumptions that can be made about the problem representations above (that states that education is not free), is that education systems will always be moving forward and changing, especially with technological innovations, which will always require funding if they are to keep up. This representation of the problem also assumes that public funding will always be able to sustain the annual education budget.

The second underlying assumption of the problem representations is that poor districts are poorly resourced, and therefore the schools within such districts that offer free education to poor learners, are also poorly resourced. ANA results show that learner performance in poor provinces (such Mpumalanga and Limpopo) and districts (those that receive the majority of public funding) are still under-performing, regardless of these provisions (Republic of South Africa 2015, 65).

#### **4.3.3. Management of the system and learner performance**

In the *Plan of Action*, efficiency and quality are identified as linked problems, and solutions are offered in the form of “getting inputs right”, which include aspects such as improving school resources that would similarly solve the problem of poor learner performance (Republic of South Africa 2003, 6). The policy also indicates that the problem (the explicit representation of the problem) of poor learner performance is associated with the school management system (Republic of South Africa 2003, 7). In relation to the school system, the government offers to improve management of the system so that “education resources are translated into quality teaching and learning, and into meaningful economic, political and cultural empowerment of all our people’ (Republic of South Africa 2003, 7). The policy proposal therefore implies that better-managed schools produce better learner performance outcomes. The implicit representation of the problem here is therefore that learner performance is low because schools are poorly managed. Furthermore, the policy states that good management will improve the quality of education and produce job satisfaction among teachers (Republic of South Africa 2003, 12). The implicit representation of the problem is that learner performance and teacher job satisfaction has been low due to a poorly managed system.

In addition to the above, the *Plan of Action* also suggests that under the “performance of the schooling system”, the government suggests establishing a better Monitoring and Evaluation framework, in order to strengthen the systemic evaluation programme of the Department of

Education, to provide access to all learner performance statistics, and to produce an annual sector report (Republic of South Africa 2003, 27). The aim of these initiatives is to provide a better overall view of education performance within districts (Republic of South Africa 2003, 28). The government believes that access to such information can empower communities and can compare performance with districts of similar socio-economic status, and keep government and schools accountable (Republic of South Africa 2003, 28). In comparing this learner performance between districts, the policy proposal suggests that “an effective system and well-managed schools contribute to better learner performance” (Republic of South Africa 2003, 28). The policy proposal therefore implies that learner performance is poor due to an ineffective system and poorly-managed schools, which is identified here as the explicit representation of the problem. Here a repetition has been identified within the policy proposals, suggesting that learner performance in large part has to do with how the system is managed, and government’s focus on improving the system implies that the (education) system is not well managed. The implicit representation of the problem is therefore that learner performance is poor, and teacher job satisfaction is low, due to a poorly-managed system.

The assumption is that there is a direct influence on learner performance based on how the system and schools are managed. Poor management, it is assumed, is a reflection of the entire education system (on all levels): national, provincial, district, and school. Another assumption is that the government, with the effect of giving communities access to learner performance information, will rely on communities to apply pressure for a lack of learner performance. However, this pressure will only be applied onto school management, and not other areas of management (provincial and district, for instance) where accountability is also needed. It is also important to consider that learner performance also has much to do with each learner’s circumstances. For example, Chisholm (2004:19) points out that the impact of poverty on learner performance is just as damaging as a badly-managed system.

In the *Action Plan to 2019*, goals seven to nine are focused on improving the average performance of learners (Republic of South Africa, 2015:26). Goal seven is focused on grade six learners’ language performance (Republic of South Africa, 2015:26). Here the attention is put on tests results, specifically Southern and Eastern Africa Consortium for Monitoring Educational Quality (SACMEQ), and Progress in International Reading Literacy Study (PIRLS) (Republic of South Africa, 2015:26). Preliminary results indicated that there has

been no statistical significance in results between 2000 and 2007 (Republic of South Africa 2015, 26). This is identified as the explicit representation of the problem. The implicit representation of the problem is that there has been no improvement in learner performance, in SACMEQ and PIRLS tests, between 2000 and 2007.

The policy proposal also indicates interventions that have been made since 2007, in the form of the distribution of national workbooks and a guide for clearer curriculum, which it hopes the 2013 results will reflect (Republic of South Africa 2015, 26). This is the explicit representation of the problem. In other words, the policy proposal suggests that the solution to poor SACMEQ and PIRLS performance tests is to provide national workbooks and a clearer curriculum. The solution implies firstly, that there were no national workbooks and secondly, that the curriculum was unclear. The implicit representation of the problem is that the ‘problem’ is a lack of national workbooks and an unclear curriculum itself, and not learner performance.

The *Plan of Action* and the *Action Plan to 2019*, emphasise the role of provinces within the Annual National Assessment (ANA). The idea is to compare results in order to identify the underperformance of areas in certain provinces (Republic of South Africa 2015, 16). The policy proposal is to aim more funding at struggling provinces and districts (Republic of South Africa 2015, 16). The policy suggests that struggling provinces are poorer in that the majority of learners in these provinces “experience greater barriers to learning”, and that each province has “different poverty burdens” (Republic of South Africa 2015, 16). This is the explicit representation of the problem. The policy proposal also suggests that “similarly poor or disadvantaged learners perform better in certain provinces than others and we can expect this to be a reflection of better service delivery” (Republic of South Africa 2015, 16). The implicit representation of the problem is therefore that it is not a lack of funding that causes poor learner performance, but rather the lack of service delivery.

The assumptions that can be made about both of the above problem representations, are that the lack of learner performance between 2000 and 2007 is an indication of a lack of quality and literacy improvement. It is also assumed that quality and literacy is very much dependent on content (curriculum), and management of the system. However, as has been mentioned, learner performance also has much to do with individual learner circumstances. Here learner performance is regarded as a key concept within the policy proposal. Learner performance, as

a concept, therefore indicates what Bacchi (2009:8) calls “competing political visions”. In the policy proposal, the meaning of learner performance is located in the provision of quality education, the curriculum, and how the system is managed.

#### **4.3.4. Early Childhood Development**

Early Childhood Development (ECD) is described within the *White Paper* as an umbrella term for the development (physical, mental, emotional, moral, and social) of children from birth to nine years old (Republic of South Africa 1995, 25). ECD involves strategic programmes and services that assist parents to meet the needs of children within this age group (Republic of South Africa 1995, 25). The programmes are particularly for parents in impoverished communities, as they are not able to meet the developmental needs of their children in this age group (Republic of South Africa 1995, 25). The *White Paper* also states that these communities are unable to provide resources for ECD (Republic of South Africa 1995, 25). Both of these stated problems are the explicit representations of the problem. The implicit representation of the problem identified, is that ECD programmes are aimed at poor parents who cannot meet the needs of their children within this age group.

In the *Action Plan to 2019*, goal 11 is aimed at improving access to quality ECD (Republic of South Africa 2015, 28). While enrolment in the number of learners in ECD programmes has improved, concern is now over monitoring and improving the quality of ECD (Republic of South Africa 2015, 28), which is the explicit representation of the problem. Quality interventions have been done in terms of distributing workbooks, improving materials through provision of resource packs, clearer teacher guides, as well pre-school teacher training through National Diplomas (Republic of South Africa 2015, 29). The implicit representation of the problem of this policy proposal, is that the quality of ECD can only exist within the provision of material items and teacher training. However, areas of concern are malnutrition and cognitive development of children from birth to age nine (Republic of South Africa 2015, 29). Therefore, this policy proposal implies that the quality of ECD programmes should enhance the nutritional well-being of children in this age group, as well as their cognitive abilities, through educating parents in ways that they may have previously been unfamiliar with.

The underlying assumption that can be made here is that ECD (or lack thereof) in the context of South Africa, is a poverty issue. The assumption can also be made that since ECD

programmes are aimed at only poor parents, these parents do not necessarily have the capacity and resources to raise children in a way that enables them to enter, and progress, in the school system. A study by Ward, Makusha and Bray (2015:69) revealed that children that grow up having been given good nutrition, who have good relationships with parents, who acquired cognitive stimulation, and were provided boundaries by parents, have a greater success in education achievement and completion. The policy proposal suggests then that ECD programmes are largely for illiterate, and under-resourced parents.

#### **4.3.5. Teacher training and job satisfaction**

The “enhanced pre-service and in-service teacher education” falls under national and provincial responsibility, as well as the responsibility of provincial colleges, and national universities and technikons (Republic of South Africa 1995, 19). This is also discussed in the *Plan of Action: Improving access to free and quality basic education for all* (Republic of South Africa 2003). At the time of the publication of the *White Paper*, the Education Minister was working towards bringing teacher education and training under national control, and for universities only (Republic of South Africa 1995, 20). This was to bridge the qualifications that teachers receive, under one national qualification (Republic of South Africa 1995, 20). According to the *White Paper*, the quality of learning and teaching in schools is directly associated with in-service training of teachers (Republic of South Africa 1995, 20). Within the democratic transition, the solution offered was in the form of “comprehensive reform and re-direction of in-service education for teachers (INSET)” (Republic of South Africa 1995, 20).

The policy proposal therefore suggests that in-service training of teachers will raise the quality of education in the democratic South Africa. The explicit representation of the problem is the “quality of learning and teaching”. The implicit representation of the problem of this policy proposal is that teacher training directly affects the quality of education. The assumption is, therefore, that training teachers will produce good quality education. This also assumes that the training that the teachers receive is of good quality, and will provide them with the skills and confidence to deliver good quality education to learners.

In the *Plan of Action*, under “Educators who are empowered to offer quality education”, the points of “more effective in-service training” and “better administrative and other support in schools” are discussed (Republic of South Africa 2003, 10). In-service training seems to be

ineffective, and administration and support in schools are lacking (Republic of South Africa 2003, 10), and together this is identified as the explicit representation of the problem. For the former, the government suggests solutions in terms of continuing training programmes that would help educators in implementing the new curriculum, and that would provide them with new skills and knowledge that would help them with tasks (Republic of South Africa 2003, 10). The policy proposal therefore implies that teachers need new skills and training in order to implement the new curriculum through ineffective training programmes. The implicit representation of the problem indicates that it is the ineffective training programmes that are problematic, and not the lack of new knowledge and skills of teachers.

Goal eight in the policy proposal shows the poor performance of teachers (teaching at grade six level) in the SACMEQ test, especially in mathematics. This is the explicit representation of the problem. Goals five and six also directly associate the poor performance in grade twelve Mathematics and Physical Science with the capabilities of teachers, and contribute the poor performance in Mathematics and Physical Science by black learners, to the legacy of apartheid (Republic of South Africa 2015, 24). These policy proposals are in line with what is stated in the *White Paper* and the *Plan of Action*. Therefore, the problem representation remains the same: that teacher training is an implicit representation of the problem, and it is not so much teachers as professionals that are the ‘problem’, but their training. The proposal also suggests that the legacy of apartheid is still a ‘problem’ in education.

The assumption that can be made with the above-mentioned problem representations is that even though training has been ineffective, teachers are still expected to gain new knowledge and skills. Another assumption is that new knowledge and skills can only be obtained through training. Lastly, the assumption can be made that teacher training has not been effective in providing teachers with the confidence, and necessary skills, to be able to teach effectively.

Under “Educators as nation builders”, the points of “understanding our constitution and its implications” and “accountability of educators” are discussed (Republic of South Africa 2003, 10). In “understanding our constitution and its implications”, teachers are described as “the midwives in the nation building process” (Republic of South Africa 2003, 10). The policy suggests that teachers who do not understand the Constitution and their role in the nation-building process “cannot effectively provide quality education”, and here this is identified as the explicit representation of the problem. The solution is to strengthen “the

nation building component” of teacher training programmes. The implication of this policy proposal is that it suggests that quality education is dependent on teachers’ understanding of the Constitution and the nation-building process. The implicit representation of the problem is therefore that the Constitution and nation-building as components of quality education, rather than teachers’ understanding of the Constitution and nation-building processes. The assumption here is that teachers lack an adequate understanding of the Constitution, and the process of nation-building, which leads to ineffective implementation of quality education.

For “accountability of educators”, government has measures in place to hold publicly employed educators accountable through the state, the principal, and communities within which the schools are based (Republic of South Africa 2003, 11). The policy suggests that there is a minority of educators who “fail to give their best in the classroom but contravene schools rules” (Republic of South Africa 2003, 11), which is the explicit representation of the problem. These contraventions occur in the form of “arriving late to work in the morning and engaging in criminal acts such as improper relations with learners and sexual abuse” (Republic of South Africa 2003, 11). This policy proposal suggests “deal[ing] decisively with educators who fail to execute their duties”. The implicit representation of the problem of the policy proposal is a school environment where there is a lack of accountability and consequences for educators who “contravene school rules”, rather than educators failing to execute their duties successfully. Here the assumption can be made that accountability measures have been ineffective. It can also be assumed that teachers do not necessarily understand to whom they are accountable (for example, principal, provincial department, national department, parents, or learners).

The *Plan of Action* also suggests initiatives to deal with educator job satisfaction, the explicit representation of the problem (Republic of South Africa 2003, 11). The first initiative is for there to be an understanding of educator identity. The policy proposal suggests that educator identity is directly associated with teachers offering quality education (Republic of South Africa 2003, 11). The policy proposal also suggests that it should make better strides as far as transparency, predictability, and fairness of remuneration is concerned (Republic of South Africa 2003, 12). Through this, job satisfaction is achieved (Republic of South Africa 2003, 11). This implies (in other words, the implicit representation of the problem) that educator identity is built on transparency, predictability, and remuneration, and targeting these will improve the job satisfaction. The policy proposal therefore implies that without teacher

identity, there is no job satisfaction and quality education. The assumption here is that in the context of South Africa, teachers do not have an established identity within the school system, which leads to low job satisfaction and poor delivery of quality education.

Other ways in which the policy suggests increasing job satisfaction for teachers, is through three incentivised processes (Republic of South Africa 2003, 12). The first process is to provide incentives for educators and principals who have displayed exceptional effort (Republic of South Africa 2003, 12), the second is for educators of scarce fields (for example Mathematics and Science), so that these educators are not lost to others sectors (Republic of South Africa 2003, 12), and the third process is to provide larger incentives for educators employed in rural areas (poor schools who are marginalised) (Republic of South Africa 2003, 12). The third incentive process also hopes to raise the quality of education in these schools (Republic of South Africa 2003, 12). These policy proposals suggest that job satisfaction is largely related to incentives. This implicit representation of the problem informs the assumption that teachers are attracted to the teaching profession for the incentives offered.

*Action Plan to 2019* goal 17 is aimed at achieving job satisfaction among teachers and creating a healthy work force (Republic of South Africa 2015, 36). Compared to other countries within the Southern African region, teachers in South Africa showed more satisfaction (Republic of South Africa 2015, 37). Issues listed that contribute to a lack of job satisfaction (the explicit representation of the problem), are those both inside and outside the teaching environment, including issues of poverty and substance abuse (Republic of South Africa 2015, 37). The implicit representation of the problem is therefore that the teaching environment affects teacher job satisfaction. The assumption here is that a good school environment will increase teacher job satisfaction.

Goal 14 also deals with teachers in terms of improving schooling (Republic of South Africa 2015, 32). Here the policy proposes to “attract a new group of young, motivated and appropriately trained teachers” (Republic of South Africa 2015, 32). The explicit representation of the problem here is a shortage of teachers, with only two-thirds of new teachers entering the system every year (Republic of South Africa 2015, 32). The implicit representation of the problem is that young, motivated, and appropriately trained teachers will improve the schooling system.

Also, the filling of specialised roles (the explicit representation of the problem), such as Mathematics and Science, is particularly difficult (Republic of South Africa 2015, 32). Part of the solution has been to reopen some of the old teacher training colleges that were shut down after apartheid (Republic of South Africa 2015, 32). Another solution is to increase the bursary programmes for teachers, as well as make the teaching profession more rewarding (Republic of South Africa 2015, 32). The rewards are offered in terms of “opportunities to influence young people’s lives, and build a better, more equitable nation” (Republic of South Africa 2015, 32). The above policy proposal implies (the implicit representation of the problem) that within the current system, teachers are unmotivated, and are not appropriately trained.

The above goal is directly related to goal 15. Since there is a shortage of teachers (the explicit representation of the problem), it has affected the teacher to learner ratios (Republic of South Africa 2015, 33). The situation is further exacerbated by the increase in learner population entering grade one every year (Republic of South Africa 2015, 33). The policy proposes the implementation of the post provisioning policy, which “determines how many educator posts each school receives”, “incentives paid to teachers to teach in remote areas”, “who gets to be appointed as an educator within each school”, “strategies to retain teachers within the public system”, as well as “the rights of teachers when enrolments decline and teachers must move” (Republic of South Africa 2015, 33). From this, it can be assumed that younger teachers are more likely to stay in their teaching positions for a longer period of time. Another assumption is that if teachers are motivated and appropriately trained (see afore-mentioned paragraphs about job satisfaction, and teacher training), schooling will improve.

The third factor, listed in the *White Paper*, is “Demographics” and has to do with the population growth involving school enrolment. The backlog in enrolment for 1994 was 1.8 million potential learners between the ages six to 18 who were not enrolled (Republic of South Africa 1995, 59). The demand for access to education increases in urban areas. This is an explicit representation of the problem, as the population of school learners is linked to the problem of school facilities and capacity (Republic of South Africa 1995, 38). However, the policy proposal by the *White Paper* for the demand in education by the large learner population, is increased funding targeted at infrastructure and facilities (thereby increasing physical capacity) (Republic of South Africa 1995, 74). This implies (the implicit representation of the problem) that not only do current schools not have the capacity for the

growing learner population to attend school, but an increase in physical capacity of already-existing schools has consequences for the quality of learning that takes place. Increasing physical capacity therefore does not guarantee an increase in the quality of education, especially when it comes learner to teacher ratios, the availability of learning materials, and so forth. The physical capacity ‘problem’ is therefore a school shortage ‘problem’.

An important point to consider here, which is a ‘problem’ that can be identified as ‘silenced’ or undiscussed within the policy proposal, is the learning culture within schools. The learning culture is something that is presented within schools as a means to positively encourage teaching and learning experiences, for both learners and teachers (Lomofsky & Lazarus, 2004:58). Therefore, it has just as much to do with the discipline of learners, as it has to do with leadership within schools, Provincial Departments, and the Department of Basic Education. What is most ‘silent’ in the policy proposals concerning teachers, is learner discipline. This does require a deeper analysis but is not the concern of this thesis. It is however, important to point out how Bacchi’s WPR analysis can help one identify such ‘silences’.

From the policy proposals it is clear that teachers fall under what Bacchi (2009:9) would refer to as a ‘people category’. This means that teachers play an important role in “how governing takes place” (Bacchi, 2009:8). Simply put, teachers, as a category, function in certain ways that inform the meanings within the problem representations (Bacchi, 2009:9). This is based on the ideas – especially Hacking (1986) and Foucault (1979) – that “people are ‘made up’” (Bacchi, 2009:9). Bacchi (2009:9) states that this has effects for “how people come to think about themselves and others”. Therefore, teachers’ roles come to be defined through policy proposals, and problem representations reveal the underlying assumptions of their role, which the above interpretation of the findings has already determined.

#### **4.3.6. The legacy of the past and inequality**

The final factor of “Rationalisation” deals with the reorganisation of the past regime’s fourteen ethnically divided departments (Republic of South Africa 1995, 59). These are combined to form the nine provincial departments. Funds here are allocated for infrastructure and logistical support (Republic of South Africa 1995, 59). According to the *White Paper*, provincial education departments are empowered by the Constitution “with executive responsibility for education within their provinces” where “functional areas” are concerned

(Republic of South Africa 1995, 42). This indicates that provinces, except where universities and technikons are concerned, make laws, and have executive authority over education, except where national law prevails (if provincial law violates national law) (Republic of South Africa 1995, 43). In other words, provinces can make their own laws regarding education, but they are guided by national policies, and provincial policy may not fail to comply with national policy. Funding is allocated, according to the *White Paper* (1995/1996 budget), through the Financial and Fiscal Commission (FFC) from national revenue (Republic of South Africa 1995, 55). Provincial governments have to create their budgets keeping in mind their “revenue estimates and spending requirements” (Republic of South Africa 1995, 55). Provinces are therefore in charge of how funds are allocated, through their respective provinces.

An explicit representation of the problem listed in the *Plan of Action* is inequality within the public schooling system (Republic of South Africa 2003, 5). This inequality is in the form of schools. In suburban areas there are schools that are described as “First World” in affluence and wealth (Republic of South Africa 2003, 5). These schools are affluent in that they receive large amounts of private funding and investment, especially from parents (Republic of South Africa 2003, 5). The opposite of these schools are those in rural and poor communities (Republic of South Africa 2003, 5). These schools are very poor and disadvantaged, and the majority of parents are illiterate and unemployed (Republic of South Africa 2003, 5). The policy proposes that government spend more money on poor schools, in the form of cross-subsidisation of poor learners by parents of rich learners, and through fee exemptions. This should inevitably lead to rich and poor learners attending the same schools (Republic of South Africa 2003, 5). This falls within national government policy to transfer resources to previously disadvantaged people. The policy proposal therefore implies that more funds in poor schools will decrease the inequality that exists between schools. The implicit representation of the problem is therefore that inequality between schools is as a result of lack of funds.

There are very visible binaries within these problem representations – poor schools and rich schools. This is similar to Fleisch’s (2008:1) analysis of two parallel economies that are present within the education system. The assumptions that underlie this representation of the problem, are that poor schools are located in poor districts and communities (also termed the former homelands and Bantu schools of the apartheid system) (Fleisch, 2008:2), and that rich

schools are in wealthy suburban areas (also known as the former white schools located in white areas under apartheid) (Fleisch, 2008:2). Therefore, the assumption can also be made that the poor schools started the new schooling system with a disadvantage, compared to former white wealthy schools, in that their physical resources were not of high quality. It is further assumed that the distribution of funds to poor schools, regulated through provincial departments, is very little compared to the funds collected (privately) by wealthy schools.

#### **4.4. The genealogy of the identified problem representations**

This section focuses on tracing the ‘roots’ of the problem representations (Bacchi, 2009:10). It requires one to look at the present situation and ask, “How we got here from there?” (Bacchi, 2009:10). Drawing the analysis to a close, it is clear that from the problem representations above, there is still much of the past apartheid system rooted in the new system. The simple example would be the existing binaries between advantaged and disadvantaged schools. Even though disadvantaged schools receive more public funding (which is regulated through Provincial Departments), these are schools that are mainly situated in poor districts (also previous ‘homelands’). In other words, disadvantaged schools are majority black schools from the previous Bantu education system. Therefore, in terms of quality, environment, and teacher training, these schools started at a disadvantage.

Tracing the ‘roots’, as Bacchi (2009:10) indicates, also includes recognising the socio-economic inequalities that are consequences of the apartheid regime; socio-economic inequalities that are evident between provinces, districts, and schools. These policy proposals are made for the sake of addressing socio-economic inequalities, and for drastic transformation. The education policies specifically aim to address quality education for the poor, to give the previously disadvantaged members of society, equal opportunities. Considering section 4.3.3, management of the system and learner performance is rooted in the legacy of apartheid. The new system had to rely on unskilled teachers, principals, provincial departments, and an inexperienced education ministry, to lead the new education system into democracy. The findings showed that teachers are experiencing; a lack of job satisfaction, a lack of skills, and a lack of training that has influenced their ability to deliver quality education. The role of teachers is very much rooted in the apartheid past since teachers, as made clear in the findings, do not have much input in the structuring of their

roles as policy implementers within policy debates. In other words, their roles are still regulated by the state.

#### **4.5. Chapter Summary**

This chapter discussed the findings of applying Bacchi's (2009) WPR approach to the *White Paper on Education and Training of 1995*, the *Plan of Action: Improving access to free and quality basic education for all*, and lastly, the *Action Plan to 2019: Towards the realisation of schooling 2030*. The chapter also provided an overview of the Department of Basic Education, as well as the three policy documents analysed. Through, the identification of patterns, this chapter showed how the three policy documents are connected over their respective periods in time. The findings within the chapter answered the research question, and critically engaged with the problem representations identified.

The problem representations are all listed under respective patterns that were recognised across all three of the policy documents. These patterns were identified as; the provision of physical infrastructure, compulsory and free education, management of the system and learner performance, early childhood development, teacher training and job satisfaction, and the legacy of the past and inequality. The chapter clarified the explicit and implicit problem representations within the three policy documents and presented assumptions that underlie these problem representations. The chapter concluded by providing a discussion of the 'roots' of the problem representations.

## Chapter 5: Conclusion

### 5.1. Overview

The thesis aimed to establish the context within which education policy has come to exist in South Africa. An analysis of the literature revealed that there were two contexts that describe and inform education policy in South Africa, namely regime change and socio-economic inequality. Regime change refers to all transformative initiatives that were developed during the transition from apartheid to democracy. These initiatives, the thesis has shown, still inform policy – specifically education policy – today. Regime change, as a context, has informed transformation, which also informs the context of socio-economic inequality. Socio-economic inequality is a legacy of the apartheid regime and continues to be a challenge for the South African government. This context has largely influenced education policy after Mandela's presidency, from 1999 onwards.

The themes were identified in a review of the literature and were identified as; the theoretical and philosophical approaches to education policy, curriculum reform, power relations, outcomes-based education, access to quality education, inclusive education, and finally the roles of teachers. The literature offered (critical) explanation and evaluation of each of the themes, and how they have shaped discourses in education policy. The literature also presented critiques on implementation of policies, and issues that are not being addressed within education policies. It has therefore been made clear throughout the thesis that policy analysis has mostly been focused along the lines of evaluations of outcomes, implementation of policies, and critical analyses. The thesis also presented Bacchi's WPR approach and stated how it is different to conventional forms of analysis. It also presented the case of why the WPR approach was used for the purpose of this thesis.

Confidence in the research approach, which was identified as qualitative, and the analytical approach used was established. This was shown in chapter three which included a discussion and motivations to the philosophical approaches undertaken for this thesis. These were identified as postmodernism, and post-structuralism, which also informed the analytical (WPR) approach used. The philosophical underpinnings also served as a guide to answering the research question. The value in analysing education policy by using Bacchi's (1999)

WPR approach, was also justified, especially through the findings represented in chapter four.

How Bacchi's (1999; 2009) WPR approach was utilised was elaborated further in chapter three. Here the emphasis was on answering three analytical questions, namely: "What's the problem represented to be?", "What are the presuppositions or assumptions that underlie this representation of the problem?", and "How has this representation of the problem come about?". The first questions produce explicit and implicit representation of the problem, which were then critically analysed so that the underlying assumptions could be identified. As Bacchi (2009:9) explains, the point of identifying the assumptions is not to reveal what the assumptions of 'policymakers' are, but rather to uncover the assumptions that are "lodged within problem representations". The findings in chapter four showed that the assumptions are enlightened through the analysis of the explicit and implicit representations of the problem.

## **5.2. The disclosure of the findings**

The problem representations, according to Bacchi (2009:1), clarify what is being discussed within policy documents. This is built on the premise that policies "constitute (or give shape to) 'problems'" (Bacchi, 2009:1). The findings reported, support this claim. The analysis revealed patterns that were consistent across all three policy documents, namely: the provision of physical infrastructure, compulsory and free educations, management of the system and learner performance, early childhood development, teacher training and job satisfaction, and finally, the legacy of the past and inequality. These patterns are an indication of the focus, as well as the dominant representations of problems, within these three education policy documents.

Firstly, the findings revealed that education as concept, in the context of South Africa, is given meaning through physical provisions. This finding reveals how the limitations that are placed on 'education' as a concept, effect how it is discussed and debated within education policy. This section (4.3.1) also identified the first binaries within the analysis, placing emphasis on the advantages of having good infrastructure, and the disadvantages of having bad infrastructure for schooling.

Secondly, the findings revealed that policy proposals for compulsory and free education (under section 4.3.2.) are quite idealist in approach. As the findings suggest, compulsory education does not adequately deal with aspects that are barriers to education for disadvantaged learners, especially where quality is concerned. These barriers are mostly in the form of poverty (where family dynamics rely on children to earn an income in order to survive (Edmonds, 2005:387), for example). The findings also show that free education, in the South African context, comes at a cost. Also important to this point, is that South Africa's education system largely relies on public funding, and the policy proposal, as the solutions are presented, suggests that there is a confident expectation that public funding will always be available.

Thirdly, the section on management of the system and learner performance (4.3.3.) revealed that the system has been managed ineffectively, which has resulted in poor learner performance. This point, the findings showed, is rooted in the legacy of apartheid, where the system was transferred into democracy at the hands of inexperienced management. Emphasis is on the fact that it is due to the oppression of the apartheid system that prevented education leadership in the new democracy, from gaining experience.

Fourthly, the findings revealed that early childhood development (under section 4.3.4) is largely related to poverty. The findings here provide insight into the socio-economic circumstances under which children are expected to thrive. This section also indicates that poor parents are not within capacity to meet ECD demands in order for their children to enter successfully into the schooling system.

Fifthly, the teacher training and job satisfaction (section 4.3.5.) showed that the focus on teacher training is essential, but that the role of teachers need to be clarified. Pertinent to teachers' roles are that they are policy implementers and should be policy developers as well. Teachers are in large part described as a 'people category', as suggested by Bacchi (2009:9). The findings revealed that teachers have low job satisfaction, mainly due to ineffective training.

The concluding section (4.3.6.), the legacy of the past and inequality, largely revealed areas that need redress. It reflected on the responsibilities of provinces within the education system, and more specifically, provincial responsibility of budgets for schools. This section also showed how inequality has become persistent between provinces, districts, and schools.

These inequalities exist to the detriment of the poor, and their (lack of) quality education. This is supported by Sayed (1999), who warned against the decentralisation of the education system due to its ability to reinforce inequalities. This has been evident within, and between, the different provinces and schools. ANA results reflect that there is a large difference in learner performance within provinces and schools, and well-resourced provinces and schools ultimately have better performance outcomes (Republic of South Africa 2015, 65).

The final findings (under section 4.4.) revealed the ‘roots’ of the problem representations. The problem representations showed that there is still much of the legacy of apartheid that has not adequately been addressed, and feeds into the current education system. Once again, the findings showed that the legacy of apartheid mostly persists for those who were previously disadvantaged. Also important to these findings is the emphasis on the fact that those previously (and presently) disadvantaged, who have to function within disadvantaged circumstances (including schools), are expected to attain equal education as those who have to function within advantaged circumstances.

### **5.3. Future analysis**

The thesis answered only three of Bacchi’s (1999; 2009) WPR approach questions. This is because the thesis only intended to identify the problem representations in education policies, and to critically analyse them. This was in fulfilment of answering the research question, which can be stated, the thesis did suitably.

It is suggested that future analysis can reveal a more in-depth investigation of “gaps and silences” (Bacchi, 2009:12) through the identified problem representations. The last three questions are “What is left unproblematic in this problem representation? Where are the silences? Can the problem be thought about differently?”, “What effects are produced by this representation of the problem?”, and “How/where is this representation of the problem produced, disseminated and defended? How could it be questioned, disrupted and replaced?” (Bacchi, 2009:2). These questions elicit a deeper critical analysis of the problem representations, which requires a form of reflection and self-analysis (Bacchi, 2009:19).

The suggestion for future research would be to apply the analysis to one policy proposal, and to conduct a single discussion. The researcher found that analysing three policy documents made the process of analysis and answering the WPR questions complicated. This was due to

the difficulties of discussing the findings without comparing the different policy proposals in the areas in which they overlapped. Not critically evaluating the policies in terms of the progress that has been made over a period of time was therefore challenging. This was a new form of policy analysis, never before applied to education policy in South Africa, which challenged the researcher's own conformity to conventional analysis tools, such as evaluation and implementation analyses.

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