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Analysis of the Constraints to the Realisation of the Aims of the Language-in-Education Policy of South Africa

Research Report

Submitted in partial fulfilment of the requirements for the degree of Master of Management in Public Policy

FACULTY OF COMMERCE, LAW AND MANAGEMENT

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In Memoriam

Hope Fariranayi Chitapi

9 April 1951 – 25 July 2015

My father epitomised quiet, steady, unshakeable love. This is a man who made innumerable sacrifices of his own aspirations to make me the man I am today. May my life's efforts be worthy.

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To my wife, Rufaro Dhlembeu. You are my rock, my treasure, the jewel of my life. Never mind future riches – with you by my side I am already rich beyond measure. Thank you for your endless patience, and for making this work possible.

To the One who *is* the Word, the Alpha and the Omega, the Master Linguist, Supreme Teacher, Weaver of Words and Worlds. Jesu Kristu Musiki; uMdali; Modimo; die Skepper; der Schöpfer; le Créateur. To You be all honour, glory and gratitude. My words are too small, so I echo Your own words:


Imi Ishe, Mwari wedu, makafanira


kuti muigirwe kubwinya, nokukudzwa,


nesimba, nokuti ndimi makasika


zvinhu zvose, zvakavapo, zvikasikwa


nokuda kwenyu. *Zvakazarurwa, [4:11] (Rev. 4:11)*

(with thanks to Pule Welch, co-creator of Isibheqe)

Abstract

The South African Language in Education Policy (LiEP) of 1997 was created to contribute to the transformation of the education sector and of South Africa as a whole, through its promotion of the recognition and use of African languages that were marginalised during the apartheid era. The mechanism of additive bilingualism was identified as the key to achieving the goals of quality education and equitable treatment within a pragmatic framework. However, two decades on, LiEP has not been effectively implemented, nor does its implementation appear imminent. Spolsky's (2004) framework posits that language policy functions at three levels: ideology, management and practice. Applying this framework, and using a combination of novel documentary analysis of the LiEP itself and eight in-depth expert interviews, this study examines the constraints that have limited implementation of the LiEP. The constraints within the LiEP policy text itself include the ideological separation of education from Black Economic Empowerment; and the policy management decisions within the Department of Basic Education (DBE) to ignore curriculum planning, and to postpone the completion of the LiEP document and regulations. The constraints arising out of the "public" expression of language policy within and beyond the education sector occur at all three levels. At ideological level, constraints include the lack of a unified ideological position within the DBE, and the side-lining of the LiEP by the DBE. At management level, public attitudes against the extended use of African languages are a critical constraint. Inadequate resourcing of the 'multilingual project', in terms of teacher and materials development, is a further constraint limiting LiEP implementation. At practice levels, the ongoing hegemony of English and the related collusive practice of elite closure continue to thwart LiEP implementation. The completion of the LiEP, its integration into the DBE's main programmes and its overt promotion within and beyond education are the key recommendations. These policy management steps should be aligned explicitly and directly with economic empowerment initiatives and imperatives.

Key Words

Additive bilingualism; curriculum policy; economic empowerment; elite closure; English hegemony; language-in-education; language ideology; language management; language policy; language practice; language of learning and teaching (LoLT); mother-tongue education (MTE); multilingualism; power; valorisation

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Acronyms and Abbreviations

AAC	Augmentative and Alternative Communication
ABLE	Additive Bilingual Education
ANC	African National Congress
BEE	Black Economic Empowerment
CA	Chartered Accountant
CAPS	Curriculum and Assessment Policy Statement
CCSC	Coordinating Committee for School Curriculum
CELS	Contemporary English Language Studies
DBE	Department of Basic Education
DHET	Department of Higher Education & Training
DoE	Department of Education
EGRS	Early Grade Reading Study
FAL	First Additional Language
FP	Foundation Phase
GDE	Gauteng Department of Education
GDP	Gross Domestic Product
HL	Home Language
HLP	Home Language Project
IIAL	Incremental Introduction of African Languages
LANGTAG	Language Plan Task Group
LiEP	Language in Education Policy
LoLT	Language of Learning and Teaching
LPEC	Language Policy in Education Committee
LPP	Language-policy planning
LTSM	Learning and Teaching Support Materials
MEC	Member of Mayoral Executive Committee
MLE	Multilingual education
MOI	Medium of Instruction
MTE	Mother-tongue education
MTM	Mother-tongue medium
MUST	Multilingual Studies
NCERT	National Council on Educational Research and Training
NCS	National Curriculum Statement
NLP	National Language Plan
NPO	Non-profit organisation
PanSALB	Pan-South African Language Board
PED	Provincial education department
PIRLS	Progress in International Reading Literacy Study
RSA	Republic of South Africa
SA	South Africa(n)
SADTU	South African Democratic Teachers Union
SASA	South African Schools Act
SGB	School Governing Body
TIMSS	Trends in International Mathematics and Science Study
TLF	Three-Language Formula

Chapter 1 – Introduction

> *The language of an African child's formal education [is] foreign… Thought, in him, [takes] the visible form of a foreign language… [and this results] in the disassociation of the sensibility of that child from his natural and social environment, what we might call colonial alienation.*
> [Ngũgĩ wa Thiong'o, 1986, p. 17]

1.1 Background Information

South Africa, situated on the southern tip of the African continent, and thus (uniquely) surrounded by the waters of both the Atlantic and Indian Oceans, is a country of remarkable diversity. Geographically, South Africa consists mainly of a massive inland plateau, with an escarpment marked by the Drakensberg mountains in the east, and the Cape Fold Mountain range in the west. There is the Lowveld in the far north and north-east of the country, and the Kgalagadi desert in the north-west. South Africa is one of only seventeen countries in the world considered to be *megadiverse* in terms of biodiversity, and is number 6 on that list (Mittermeier et al., 2005).

The diversity of the approximately 55 million people living in South Africa appears to mirror that of its flora and fauna. According to Ethnologue, there are about 30 languages spoken by the inhabitants of South Africa, of which 20 are indigenous (Simons & Fennig, 2017). Eleven of the languages spoken in South Africa are official languages, namely Afrikaans, English, isiNdebele, isiXhosa, isiZulu, Sepedi, Sesotho, Setswana, siSwati, Tshivenda, and Xitsonga. There are numerous other languages spoken in South Africa, by citizens and by immigrants. These include those of the Khoe [Khoisan] family (e.g. Korana and Xiri), Arabic, Hindi, Malay, and also languages from around the globe, such as Cantonese, ChiShona, Dutch, French, German, Kikongo, Kiswahili, Mandarin and Portuguese.

South African history over some four hundred years has been characterised by conflict, systematic and intensive exploitation of people and resources, and especially by unequal, separate development along racial lines. In fact, apartheid, the Afrikaans word for "apartness" or "separation", is recognised globally as epitomising the process and outcome of an official, consistent and complete policy of racialised separate development. In

contrast to many policies, apartheid was singularly successful in bringing about its intended objectives: a sharply stratified society in which pale-skinned people, particularly Afrikaners, were *de jure* and *de facto* first-class citizens, and dark-skinned people of all hues and backgrounds, were relegated to second- and third-class status in their own country.

Apartheid was an all-encompassing system, with mutually reinforcing elements. For example, comparative under-investment in the education of black children meant that very few could qualify to study at tertiary institutions. Therefore, few could use those qualifications and experiences to make significant contributions to improving an already poor educational environment for black children. Moreover, black people's languages were relegated in status by being effectively barred from use in higher functions, e.g. in technical, commercial and legal fields. This was accomplished primarily by forcing schoolchildren to switch to English or Afrikaans after eight years of instruction in their own languages (Greenfield, 2010; Reagan, 1987).

Dealing with the consequences of this unfair education policy remains one of the many challenges of the post-apartheid era. Yet, 23 years after the official end of apartheid and start of a fully democratic dispensation, many, if not most, of the negative characteristics and outcomes of the apartheid system remain. As a prime example, overall, education outcomes remain poor in South Africa, a wealthy nation. Compared with poorer neighbouring countries, South Africa routinely performs worse than its peers on standardised international tests (Howie et al., 2017; Moloi & Chetty, 2011; Shepherd, 2011; Van der Berg, 2015). These poor education outcomes disproportionately affect young black South Africans, who are most in need of education that empowers and provides opportunities to escape the "poverty trap" that was set during the apartheid era (Taylor, 2011). Several issues are believed to contribute to this state of affairs: poor school infrastructure especially in rural and township areas, poor teaching standards, inconsistent administrative practices, inadequate levels of preparation and conditioning of children for learning in school, and the general inaccessibility of suitable curriculum content for children who are not first- or second-language speakers of English or Afrikaans (Msila, 2011; Nomlomo & Desai, 2014).

This latter challenge is a focus of this research report; it is also arguably the least widely acknowledged as a major contributing factor (Alexander, 2005). The Language in Education Policy of 1997 (LiEP) (Republic of South Africa [RSA], 1997) is the primary policy and administrative tool to address this latter challenge in education, by broadening and deepening meaningful access to education for children who are speakers of the many South African official (and other) languages. If effective, the LiEP should generate a beneficial by-product of reflecting and respecting the diversity of the population, thereby promoting the valorisation of African languages.

But, twenty years after it was promulgated, there does not appear to have been a significant increase in this access, nor any real growth in diversity, judging both by the content and patterns of school education, and by the outcomes that are being achieved. For example, the latest Progress in International Reading Literacy Study (PIRLS) report indicates that almost 80% of South African Grade 4 schoolchildren are unable to read for meaning, with the results generally worse for those who did the test in languages other than English and Afrikaans (Howie et al., 2017). It is the goal of this research report to identify and explore the reasons for the persistence of the obstacles, blindspots and resistances holding back LiEP implementation, given its apparent importance as a critical part of the solution to the South African education crisis.

1.2 The Problem Statement

The Language in Education Policy (RSA, 1997) was intended to contribute to the thorough transformation not only of the education sector but of South Africa as a whole, by promoting the recognition and use of previously marginalised Black African languages. This recognition and use of the languages in the education of South African children would gradually be expected to result in a sea-change in attitudes and in practices, and functionally multilingual people would be produced and take their place in a diverse, inclusive, plurilingual society. This is the way the expectation might have been articulated by an optimist. It does not appear to have happened, nor does it appear to be happening on any significant scale in the education sector. Instead, outcomes that are diametrically opposed to the intended outcomes of the LiEP appear to be taking hold: learners appear not to be given adequate opportunity to learn in the language that they know best; learners'

language resources are not used optimally to assist them in acquiring the target Language(s) of Learning and Teaching (LoLT); previously marginalised African languages are increasingly side-lined, falling deeper into disuse and under-development within the education system. As a result, while they will not disappear from the South African linguistic landscape any time soon, these African languages and their speakers are likely to remain languishing as "second-class citizens" in the education sector and, as a direct result, in the society.

1.3 Research Questions

This research aims to answer one fundamental question: Why does it seem that the aims of the LiEP have not been fulfilled through its implementation? This question can be re-framed in a manner that helps to facilitate an academic treatment. Thus, the research questions that will be addressed are:

- What are the constraints to the realisation of the aims of the Language-in- Education Policy of South Africa?
    - What are the constraints in the policy itself?
    - What are the constraints in the management and practices in education?

1.4 Research Objectives

The study aims to uncover and articulate some of the specific constraints that have challenged progress towards the realisation of the aims of the LiEP of South Africa. Specifically, it aims to identify some of the critical ideology-, management- and practice-related constraints, arising from the nature, content and structure of the policy document itself, and emerging from the interplay between the stated policy and existing behaviours and practices in the education system. The identification of these constraints is made in the context of the growing clear consensus from socio- and psycholinguistics on the value and benefits of both mother-tongue education and multilingual education.

1.5 The Thesis Statement

Effective implementation of South Africa's LiEP is constrained by a lack of clarity in the policy design and by historically-established characteristics that frame the educational landscape.

1.6 Delineation and Limitations

This research report is restricted to an assessment of the South African LiEP, and will therefore be focused on this policy above and before all others. There are other education legislation and policy documents (e.g. the South African Schools Act) that are relevant to the language landscape in the education system. These other documents and instruments will not be reviewed systematically and intensively. They will be referred to as and when they are relevant to the work at hand. That is to say, I will refer to them where they affect the LiEP directly or indirectly, i.e. via the language landscape in education.

This research report does not attempt to diagnose all of the structural, strategic, resourcing, execution and other problems that face the South African education system. However, there are inevitably links between the problems alluded to above and the language choices and challenges faced by officials, school staffs, School Governing Bodies, parents and schoolchildren.

While Gauteng is the main site for the research and completion of this research report, there are a few inputs to the research gained from other parts of South Africa and, to a considerably lesser extent, the rest of the world.

1.7 Significance of the Study

This study is important because it will expose the constraints that have hamstrung the implementation of a policy that has the potential to alter radically and permanently the socioeconomic landscape of South Africa within a generation. Having exposed these constraints, this research report also aims to present practical, feasible recommendations for adjustment and implementation of policy for consideration by policy-makers.

In a 2004 study focused on Mpumalanga province, Gilmartin (2004) uncovered some of the social and structural dynamics that were already observable in undermining the objectives of the LiEP and increasing the dominance of English and the associated marginalisation of all the other ten official languages, including Afrikaans. Mwaniki (2004) explored constraints to successful language management policy implementation in a provincial government context, and found language attitudes, amongst other constraints, to be particularly powerful in limiting the effectiveness of any language policy.

A study focused on Limpopo province, found attitudes to be a significant constraint, alongside a general lack of awareness about language policies (Madiba & Mabiletja, 2008). Several other authors (Desai, 2001; Heugh, 2013; Kamwangamalu, 2001; Moyo, 2001; Plüddemann, 2015; L. Wright, 2012) have observed and identified constraints; however, to the best of my knowledge, a systematic examination of the constraints arising from the structure and wording of the policy itself has not been done. I expect that my work will in the main confirm previously identified constraints arising from attitudes and beliefs, management decisions and behaviours, and practices in schools and across society.

1.8 Chapter Overviews

Following this introduction chapter, Chapter 2 surveys the literature to date. It presents a background to the problem, tracing South African attitudes to language policy in general, and to language policy in education in particular, over the 20th century and first decade-and-a-half of the 21st century. It outlines how the importance and benefits of mother-tongue education (MTE), particularly throughout the formative years, have been well-established. It reviews the aims of the LiEP, and the circumstances that appear to have militated against the successful implementation of the policy. Finally, it briefly reviews approaches to policy analysis.

Chapter 3 is the Methods Chapter, which outlines the key methodologies that have been selected to respond to the research questions within the framework presented. Chapter 4 is the first results and discussion chapter. It reports on and analyses the constraints arising directly from the content of the LiEP, i.e. the policy on paper. Chapter 5 is the second results and discussion chapter. This chapter identifies and analyses the constraints that

arise from matters relating to the language policy as it manifests in the education system, i.e. the policy in public.

Chapter 6 is the conclusion, which synthesises the results and connects these back to the initial problem statement, research questions and thesis statement, all within the outlined framework. It presents what can be definitively concluded from the study, as well as what cannot, and sets out proposals and directions for further investigation.

1.9 Motivation for this Research

I would love to see all South African languages being used as the resources that they are to promote the holistic development of people and their environments, so that all people who live in this land can flourish. The current hegemony of English and, to a lesser extent, Afrikaans, results in everyone losing out. Speakers of other languages feel (and are) marginalised at best, and excluded and denigrated at worst. In order to make any progress in a highly centralised, commercialised and anglicised economy, they are virtually compelled to become competent in English (or Afrikaans) as a third, fourth, or even fifth or sixth language. Their necessary mastery of and dexterity in several languages is under-recognised and therefore undervalued.

Speakers of only English and/or Afrikaans are advantaged in most situations in South Africa, particularly those with academic, political or economic significance. They are often unaware of this advantage, or tend to discount its impact on their progress and success. Crucially, they miss out on the value of learning other languages, for their own cognitive and cultural benefit, as well as for the social benefit that can accrue to the entire nation, when people can speak to one another using many languages. This benefit is often alluded to in government and policy circles as “social cohesion”, and it is acknowledged as rather elusive and dependent on significant amounts of communication and dialogue (Department Of Arts and Culture, n.d.; Palmary, 2015). The extent to which social cohesion depends on respect for and use of others’ languages has occasionally been acknowledged (Mosoma, Matanzima, & Mkhatshwa, n.d.; Spector, 2014).

I believe that the full expression of the intelligence, creativity and ability of people is linked to the extent to which they are allowed and empowered to be fully themselves. Whenever

and wherever it is in our power to do so, we must enable and empower people by empowering their languages to be used and expanded in all the places and spaces that people occupy.

Chapter 2 – Literature Review

2.1 Introduction

This review introduces the language-policy issues that are at the heart of this research report, and contextualises these within the South African education system and its history, and relative to multilingual education and related policies in other regions. It describes the depth and diversity of challenges in the South African education system, making for a complex web of interrelated problems. In particular, it outlines the educational policies and related language policies of the 20th century, in the context of colonial attitudes and objectives around language and education. It illustrates some of the drivers for the installation and maintenance, even post-apartheid, of a Eurocentric hegemony with respect to the use of language in society. It then summarises the key benefits of mother-tongue-based multilingual education, and provides some detail on recent research confirming these benefits in Ethiopia, an African multilingual context that compares favourably with South Africa.

The review then presents some examples in South Africa of efforts being made to apply the pedagogical research insights to South African contexts, often without official support and sanctioning. The situation is explored briefly at both school and university level, with the latter providing some insight into the infrastructural deficiencies (content production, teacher training and research support) that persist.

Key frameworks for understanding language policy are then introduced, focusing on Spolsky's ideology, management and practice framework. Finally, a brief overview of the field of policy analysis is presented, with an emphasis on how policy analysis is itself conducted, and how this affects policy implementation and policy shift in the real world.

2.2 The South African Education Landscape

The South African education system has low throughput rates, with only about one in three Grade 1 pupils of 2001 passing their Matric examinations in 2012 (Department of Education, 2003; Motshekga, 2013). More recently, it has been argued that despite a headline pass

rate of 75.1% for the Matric Class of 2017, a truer reflection of the pass rate is about half of this, given that only 59% of 2015's Grade 10 learners wrote their matric in 2017 (Times Live, 2018a). The quality of education in South Africa is also a controversial matter; for example, in order to obtain a Matric pass, a mark of 30% for some subjects is sufficient. When compared with education systems and outcomes in other countries, South Africa typically does not fare as well as might be expected of a sophisticated, middle-income economy (Spaull, 2017). While there are many views on the critical problems facing the South African education system, it is possible to summarise these views by categorising the problems into four buckets: teacher issues; low community involvement; leadership, administration and systemic challenges; and spill-over of societal problems.

The calibre of teachers in South Africa is frequently questioned. There is no simple, solitary answer to the question, "How good are South African teachers?" The current generation of South African teachers (assuming an age range of 25 – 65) includes those trained during at least three distinct periods of history. Teachers aged approximately 50 and older were trained during apartheid under a plethora of different privileged and under-resourced education departments running over 100 teacher training colleges across the country (Green, Adendorff, & Mathebula, 2014). Those teachers who are in their mid-30s and 40s trained during the 1990s and early 2000s when major structural and pedagogical changes were being introduced to the educational landscape, including the closure of many training colleges and the absorption of some into universities. Teachers who are 35 and younger would have been trained in the past decade to 2015/16, which has seen the old national Department of Education split into to two Departments, and some concerted efforts again to widen access to formal higher education for teacher trainees (Green et al., 2014).

Thus, the macro-systemic conditions under which these generations of teachers have trained differ significantly from one another – and in the case of members of the oldest cohort, their training conditions differed significantly, depending on the racialised department of education where one was placed – and these systemic conditions contribute greatly to the overall quality of training received. Furthermore, all these teachers are of course themselves products of a highly unequal education system, and therefore their levels of readiness and capability to perform their duties as teachers will be highly variable. A number of studies have revealed that the level of subject matter knowledge among some

teachers is not as high as it should be, and in some instances is barely higher than what would be expected of the primary school children they should be teaching (Hofmeyr & Draper, 2015; Luneta, 2014). It has also been found that the majority of teachers in South Africa may be uncertain and/or pessimistic about the future of their careers as well as of the education system more broadly (Matoti, 2010).

In line with the high levels of inequality and poverty found in South Africa, the levels of parental participation and community involvement in schools are highly variable. The South African Schools Act stipulated that each school should have a School Governing Body (SGB) comprising the principal, some school staff, parents, senior learners, and community members (e.g. school property owners) (Pedro, 1997). The SGB, with its proximity to and vested interest in the school, would be best placed to make important decisions about the running of the school and about resource allocation for the benefit of the school children, the school and the community. In some areas, particularly urban centres and their suburban surrounds, there are very high levels of involvement of participation in both private and public schools (Hudson, 2017; John, 2012).

In many parts of South Africa, however, parents are unavailable or unprepared to participate meaningfully in the regular decision-making and ongoing activities of schools. Parents are often unavailable simply because their employment obligations mean that they are unable to attend SGB meetings or open school meetings (Xaba, 2011). Many other parents are unemployed, often because they themselves have received poor education and are considered unemployable. These and other parents consider themselves unprepared as they may feel insufficiently competent or even insufficiently literate to contribute meaningfully (Mouton, Louw, & Strydom, 2012). For example, financial literacy and competence is often assumed by SGBs, or conversely assumed by parents to be expected of SGB members (Xaba, 2011). Furthermore, low levels of mutual understanding and trust mean that when communication is required to clarify expectations or to resolve problems, it is often laced with conflict and ultimately unsuccessful (Mestry, 2006). These levels of interest, involvement and participation make a significant difference to the effectiveness of schools in their primary mission of delivering quality education to learners; furthermore, the interest or lack thereof reflects the involvement of parents in supervising, encouraging and supporting their children through the school curriculum.

It has been shown that the new South Africa's education system remains, in reality, two separate systems occurring side by side. Several independent studies demonstrate a stable, consistent bimodal distribution of educational outcomes by independent variables such as home language (English / Afrikaans vs. African language), socioeconomic status (wealth quartile) and type of school (former white vs. former DET/homelands) (Shepherd, 2011; Spaull, 2013; Taylor, 2011). Thus, there are particular and deep systemic challenges faced by one part of the system (mostly black and poor), which require particular attention, and whose solutions may not be relevant to the other part of the system (mostly wealthy and white, but increasingly multiracial). For example, an absence of enabling conditions (such as a capable teacher complement or effective leadership) appears to be the reason why many contributing factors that are found to improve teaching outcomes in more affluent schools are ineffectual in many less-affluent black schools (Shepherd, 2011).

Effective administration and governance remain unresolved in many public schools. Appropriate financial and resource management, timely and effective decision-making, and continuity and reliability in administrative practices are often lacking (Mestry, 2006; Mouton et al., 2012). The leadership in the education sector has often been called into question. At a school level, the possession of even basic qualifications by school principals is not a given, partly due to inadequate vetting processes by departmental authorities, and partly due to corruption (Mouton et al., 2012). The quality of the school principal has been shown to be a key determinant in the educational outcomes produced by a school (Wills, 2015), particularly due to the leadership role that the principal should perform in managing and directing the instructional programme of the school (Naidoo & Petersen, 2016). However, the key workers' organisation in the education sector, the South African Democratic Teachers Union (SADTU), has consistently and effectively blocked any serious reforms either in raising the bar of expectation on principals, or in holding principals to account for the management and outcomes of their schools (Maluleke, 2012; Smit, 2013). Notwithstanding the historically-based justifications for this rejection, the net effect on schools in South Africa is a general dearth of exemplary and visionary leadership. At a political level, there are low levels of political accountability for major systemic challenges such as the stagnating quality of Matric outcomes and poor logistics management, such as that which resulted in the failure to deliver textbooks to Limpopo province in 2012 (Mouton et al., 2012).

2.3 South African Language and Education Policies in the 20th Century

Language is a critical element in the systematic provision of education, and this is especially true in circumstances where education must specifically enable "[e]xpansion of human capabilities" (Skutnabb-Kangas & Heugh, 2012a, p.2) in order to address past inequality. It appears that it may not have received sufficient and appropriate attention over the past two decades since the official end of apartheid. Language was a key component of the toolkit of segregation used by the apartheid government, and the repercussions of this reality continue (Chamberlain & van der Berg, 2002; Mda, 2010). The ramifications of this are that, in many instances in South Africa, teachers' and schoolchildren's grasp of the language(s) they use to communicate in the classroom is compromised: the direct effect is poor communication between teacher and learner, and, ultimately, systemic failure (Ouane & Glanz, 2011). Because language is a carrier of culture, communication and aspirations, it is an integral tool of not just every educational system, but also every economy, and can work as an enabler or as a barrier (Hélot & Ó Laoire, 2011; Ricento, 2014). Therefore, all decisions about language policies are deeply ideological and have deep sociological implications for all citizens and across generations.

Education in apartheid South Africa was a primary/central tool that was used to divide and demean the black African population, destining them for a life of third-class citizenship in the land of their birth. Specifically, based on the Bantu Education Act of 1953, a primary school curriculum was developed that would prepare students for subservient roles in apartheid society (Heugh, 1999). The system divided South Africans along tribal lines into arguably more groups than was truly warranted (Heugh, 1999, 2013). It then provided these divided groups with an inferior education compared to their white counterparts.

This education was limited in content and outlook, and fitted in with Verwoerd's / Vorster's philosophy that there was no good reason to produce a highly educated African when all that was required of him was to respond appropriately to the needs of his white superiors (Heugh, 1999). Perhaps the cruellest irony in the history of South African education is that the period of apartheid between 1955 and 1976 saw the provision of the most structurally appropriate form of education (Benson, Heugh, Bogale, & Gebre Yohannes, 2012) to most black schoolchildren, in that they learned in their own home languages until the end of the

eighth year of school (Heugh, 1999, 2013). In this period, the Matric pass rates for black pupils reached their highest point (83% in 1976). Following the deadly Soweto protests in June 1976, a key result of which was the earlier introduction of English in place of home languages, pass rates for black students steadily sank, reaching a nadir of 44% in 1992 (Heugh, 1999).

2.4 Colonial Attitudes Towards Language and Education

The struggle against apartheid constrained the thinking about language use particularly in education. A long-standing unofficial policy of the African National Congress (ANC) and other liberation movements had been to use English (Alexander & Heugh, 1999, cited in Coffi, 2017, p. 49). This was driven by two things: the first, a combination of parsimony/pragmatism, i.e. a desire to present and maintain a unified front against domination, and the second, an already pervasive belief that English was a superior language to (black) Africans' own languages (Alexander, 2004). These things were rarely, if ever, critiqued by the protagonists during the apartheid struggle. Leaders of the struggle movement communicated in the public domain almost exclusively in English, submitting wilfully then (and perhaps unconsciously now) to Bourdieu's concept of a *monolingual habitus* (Alexander, 2004; Hélot & Ó Laoire, 2011). The term *habitus* refers to (a characteristic of) a system or set of attitudes and values that are held by a particular class of people within a society, which tends to determine the way in which that class interacts with the rest of the society (Sullivan, 2002). So, *monolingual habitus* refers to a class tendency to accept or prefer an environment in which only one language is spoken or, more accurately, prioritised. The unity of purpose and language ultimately obtained its goal: political emancipation. It came, however, at the price that the unquestioned assumptions of the universal utility and superiority of English have remained with us, implicit in attitudes towards and behaviours relating to it vis-à-vis other languages. English is still seen as the language of success in economic and political spheres (Bagwasi, 2012; Cook, 2013; de Wet, 2002; Foley, 2008), and despite the importance of home languages in the home and cultural spheres, there is still a significant tendency to minimise or trivialise the relevance of home languages, even among black South Africans (de Wet, 2002).

Perhaps the most fundamental point in all this is the contention, put forward by Carnoy (1974), that the imperial objectives of English (in particular, but also of the languages of other European empire builders such as the French and Spanish) have been so successful in education that they have continued to achieve these even long after the colonial era has officially ended. This is despite (and indeed, perhaps *because of*) the education of local elites, even if they were the ones to instigate independence. This is also despite the transfer of political power and the advent of universal suffrage. The function of education in imperial systems is and always has been to maintain the status quo (Carnoy, 1974).

Formal education in most instances is a novel (re-)introduction of the imperial power. Its expatriates and a select few locals are exposed to the very best versions of this formal education. The rest of the population receive inferior versions of the same education, specifically designed to keep them low in the social pecking order, and to make them accept the status quo. If and when independence comes, the status quo is maintained by the new indigenous elites, in order to enable them to retain their positions of superiority (Myers-Scotton, 1993). In most instances in Africa, Latin America and Asia, the colonial language has retained its position as the language of high social status, and aspiration. This while the indigenous languages have remained lower in status, in spite of the independence of the indigenous population.

The approach to power implicitly described above corresponds well to a 'three-dimensional view of power' (Lukes, 2005, p. 28) by which the areas of contestation for power are themselves hidden from view through an acceptance of the status quo by those who are oppressed. In South Africa, there still appears to be a significant gap between the present social consciousness and a time in which a majority (or a critical minority) of the 'previously disadvantaged' recognise their complicity in ensuring continuity between previous and current disadvantage. In the linguistic context of South Africa, language experts have been distracted from the real, relevant hard work of re-imagining and re-commissioning black African languages by, amongst other things, uncritically maintaining the distinctions between so-called *Ausbau* languages as generated by apartheid language planning (Alexander, 2004). In the words of Alexander (2004): "Because of this timidity, major social, economic, political and cultural advances that would lift the South African political community above current levels of stagnation and mediocrity are being blocked" (p. 118).

The retention of high status by virtually all the colonial languages of Africa is a phenomenon that is worthy of further attention. It is a fact of history that most African borders were drawn up with little consideration for the distribution of groups of people, and with minimal consideration of the geography upon which that demographic distribution would have in part depended (Michalopoulos & Papaioannou, 2011). As a result, in many African countries (South Africa included), it has been an aim – sometimes explicit – of the post-independence leadership to maintain national unity in countries that have contained many linguistically and culturally diverse groups. Thus, in order to minimise conflict and competition between linguistic groups, many leaders have effectively adopted the colonial language as a "neutral" medium, a power-leveller that does not favour any one group over another (Salhi, 2013). Of course, as noted previously, the irony is that such an approach is simply not neutral, since it obviously favours the local elites and the descendants of the colonialists, and assists greatly in reinforcing a socioeconomic dynamic that suppresses the advancement and flourishing of the majority, who are not as familiar with or competent in the colonial language.

2.5 Multilingual Education

It is true that for a century or more Western education systems have mostly treated bi- or multilingualism as a distraction (at best) or an impediment (at worst) to formal education (Hélot & Ó Laoire, 2011; Jessner, 2008). However, significant insights have been gained into both the acquisition of first and (particularly) additional languages in education and in multilingual education over the past decade or so.

2.5.1 The Value and Benefits of Multilingual Education

By the turn of the century, established research had shown that there were practical and educational advantages to bi- and multilingualism, and it was a clear fact that in many global contexts, South Africa's included, multilingualism was a fact of life that children were particularly adept at coping with and thriving in (Hélot & Ó Laoire, 2011; Heugh, 1999; Heugh, Siegrühn, & Plüddemann, 1995). The importance of cognitive academic language proficiency [CALP], i.e. a level of ability in a language that enables its user to absorb, process and assimilate and apply content in a school or academic context, was widely demonstrated

(Cummins, 1979, cited in Barnes, 2004, p. 53). Acquisition of this level of competence in a first language facilitates both the learning *of* a second language and the development of the capacity to learn *in* the second language. What was less clear, perhaps, was the generalisability of insights about how much mother tongue education (MTE) was necessary before switching to a second language. Ironically, one of the earliest and most expansive studies assessing bilingualism in education was conducted in South Africa in the 1930s, and demonstrated clearly that "[n]ot only the bright children but also the children with below normal intelligence [did] better school work all round in the bilingual school than in the unilingual school" (Malherbe, 1969, cited in Cummins, 1984, cited in Heugh, 2002, p. 178). Unsurprisingly, this study was done among only white children, and assessed their competence in only Afrikaans and English. Until very recently, it was difficult to come by clear supportive evidence in favour of MTE that could be seen to be easily applicable to the (South) African situation, characterised a fractious political history, a state with relatively weak delivery mechanisms including a poor education system, and the presence of speakers of many languages in resource-constrained urban and rural settings (Skutnabb-Kangas & Heugh, 2012a).

2.5.2 Multilingual Education in Ethiopia: An Intriguing Example

In the mid- to late-2000s, research assessing the outcomes of a sustained period of constitutionally-supported and politically-decentralised MTE across Ethiopia has come to light (Skutnabb-Kangas & Heugh, 2012b). It has been intensively reviewed and assessed for lessons and for comparisons that can be drawn with other regions in the 'global South' (Benson & Kosonen, 2012; Nikièma & Ilboudo, 2012; Pérez Jacobsen & Trapnell Forero, 2012).

In 1994, the new Ethiopian constitution affirmed teaching and learning in home languages (mother tongues) as a constitutional right, and set about enabling the realisation of these rights. By 2009, there was primary school instruction in up to 21 of Ethiopia's more than 80 national languages (Benson et al., 2012). It is important to bear in mind that this is in a context in which the teacher-to-pupil ratio is an average 72:1 in primary school (Benson et al., 2012), in a country whose GDP per capita is ±$453 (cf. South Africa ±$7,336 per capita) (UNdata, 2014).

The Ethiopian case has demonstrated evidence of the following:

- All other things being equal, students who receive eight years of mother-tongue medium (MTM) education achieve the highest scores across the curriculum.
    - Children who have six full years of MTM education and some subjects taught in their mother-tongue in years 7 and 8 achieve the second highest scores overall.
    - Children with six years of MTM education and whose teachers receive training in MTM teaching at least for years 1-4 achieve the next best scores.
- With eight years of education in MTM, children are most likely to achieve a performance level that allows enrolment in secondary school, implying that optimal use and development of MTM education holds the best prospects for low-income, poorly-resourced areas.
- In general, children with only four years of MTM fare worst, although there is significant regional variation in this. (This level corresponds to the optimal MTM education that most South African children receive.)
- Students who learn three languages during primary school tend to do better than children who learn just two languages, especially in contexts where the full six or eight years of MTM education has been implemented (Heugh, Benson, Gebre Yohannes, & Bogale, 2012).

The case of Ethiopia clearly demonstrates that what has been known about the pedagogical requirements of MTE and of education in a second language is true and applicable to highly multilingual and resource-poor contexts such as are found in much of Africa, including South Africa. South Africa is neither nearly as poor, nor nearly as multilingual as Ethiopia; in fact, in such a relatively resource-rich context, the imperative to implement an educational regime that is beneficial to the majority should be even stronger. And yet the opposite impetus seems to dominate.

It is true that there are many difficulties associated with the Ethiopian 'success story': many languages are still not catered for; there is much room for improving the quality of teaching in mother-tongue; and there is a growing challenge with demand and preference for English (Heugh et al., 2012; Heugh & Skutnabb-Kangas, 2012). It is also true that there are

important differences between South Africa and Ethiopia to take into account: very different colonial histories, presence/absence of a historically dominant racial minority, and literary tradition (including scripts) in African language[s]. All these factors notwithstanding, the reality is that the example of Ethiopia puts paid to several of the excuses that are frequently presented in the case against multilingual or MTE: expense, practical implementation challenges, 'excessive' proliferation of languages, inequity of application, and primacy of access to a (commercially) dominant language (Dalvit, Murray, & Terzoli, 2009; de Wet, 2002; Heugh, 2000; Obanya, 1999; L. Wright, 2012).

2.5.3 Extending MLE in South Africa: Project Examples

Mother-tongue based multilingual education (MLE) is considered by many scholars in the field to be the most effective means to guarantee African children quality education within a framework of sustainable development (Alidou et al., 2006). The Additive Bilingual Education (ABLE) Project was a project launched in 2003 in the Eastern Cape, with the core purpose of assessing the long-term effects of the late-exit, transitional, bilingual curriculum delivery on the isiXhosa and English proficiency of learners, as well as their cognitive development and academic achievement compared with control groups (Koch, Landon, Jackson, & Foli, 2009). Additive bilingualism may be defined as "the maintenance of the mother tongue (or home language) whilst providing access to and the effective acquisition of additional languages" (Barnes, 2004, p. 51). It is important to note that this project was launched based on the concerns of teachers and trustees of the school that the schoolchildren were not maintaining the trajectory of early potential that they had demonstrated during their years of isiXhosa-medium instruction once they switched to English-medium instruction in Grade 4. Thus, in consultation with the coordinators of a programme promoting appropriate use of mother-tongue in education, they agreed to make their school the site of the experimental ABLE project (Koch et al., 2009).

The school is located in a very poor, isolated rural environment. At the time of the ABLE project, most learners that had gone through the school had not been able to progress beyond Grade 9 successfully.

The ABLE model is essentially the maintenance of isiXhosa as the main LoLT throughout primary grades, with the percentage of English-medium instruction increasing from 5% in Grade R to 50% by Grade 9 (and approximately 25% at Grade 4, instead of the usual 100% from Grade 4 onwards). The results from the ABLE project test school were to be assessed against those from a control school, in which the usual abrupt switch to English in Grade 4 occurs, and those from a comparator school, in which English is the LoLT from Grade R.

The preliminary quantitative results of the ABLE project, from 2006 (after four years of the project), were presented by Koch et al. (2009).

Tests for cognitive processing and language ability confirmed that the children in the test school (isiXhosa LoLT) and the comparator school (English LoLT) were of the same level in Grade R (2003), at the start of the project. After four years, the two groups were still comparable in terms of cognitive processing. As expected, the learners in the test school outperformed those in the comparator school in the isiXhosa language test, and the comparator school learners outperformed the test school learners in the English language test. In addition, the test school learners outperformed the comparator school learners in the language tests in their respective LoLTs, i.e. the test school learners' performance in isiXhosa was better than that of the comparator school learners in English. In Learner Performance Tests for life skills, numeracy and literacy, the test school children also outperformed the comparator school children, although the differences in this case were not statistically significant.

Koch et al. (2009) are careful to point out that the small sample sizes and other statistical limitations arising from the techniques used constrain the ability to find significant statistical differences where they might exist. In addition, much research has established that the benefits of ABLE will not necessarily be clearly demonstrable after only four years. Nevertheless, given Koch's assertion that "attitudes [to mother-tongue education, specifically additive bilingual education] will start changing when people see that things are different" (Personal interview with E. Koch, 30 April 2015), the demonstration contained within this paper presents compelling evidence that things indeed "are different" for the better when the additive approach is assiduously adopted.

A conference held in 2008 outlined some of the key implications from the work done to date in the ABLE Project. The key areas for intervention were in terms of expanding and improving assessment in isiXhosa, promoting teacher training in support of ABLE, and developing materials specifically designed for such education, with the support of the education department, tertiary institutions (especially their education faculties), Pan-South African Language Board (PanSALB) and Non-Governmental Organisations (NGOs) (Koch, 2008).

The ABLE Project came to an unexpected and unceremonious end with the results of the 2011 Annual National Assessments (Personal interview with Koch, 30 April 2015). Despite the efforts of the school teachers and researchers to show that the continued insistence of setting English-only Annual National Assessments (ANAs) was unfair and pedagogically invalid – this included translating the ANAs and demonstrating the improved performance – the results were deemed poor, and a number of 'interventions' were introduced, among them the ending of the project (Koch, 2015).

The Home Language Project (HLP) was started in 2000 as a collaboration of SGBs and the Gauteng Department of Education (GDE), for extending the provision of African-language education to Parkview Primary school learners. Despite some initial administrative difficulties with the GDE, the project survived its early phases, and in 2004/05 was converted into a non-profit organisation. It continues to this day, and has been extended to three "former Model C" schools in Gauteng. Its mission is "to make it possible for language to be used in multilingual classrooms in a way that empowers all learners without disadvantaging any" (HLP, n.d., n.p.).

The HLP has a number of distinctive features. It is a parent-initiated project that recognises the inherent language resources that children bring to the class and uses these alongside the common language or LoLT. It does not require the division of learners into separate language streams or schools, and so does not work against social cohesion goals articulated through various official channels. The interactive task-based approaches are more learner-centric, rather than teacher-centric, and these approaches are developed using research data produced in collaboration with academic institutions. The HLP not only facilitates

improved learning for African-language speakers, it also facilitates the learning of African languages for English- and Afrikaans-speaking children (HLP, n.d.).

The HLP is a small-scale attempt to realise the aims of the LiEP by developing and validating multilingual strategies, techniques and materials for use by teachers, and by promoting literacy in home languages beyond the Foundation Phase (FP). By doing these things, the HLP is a contribution to achieving each one of the six official aims of the LiEP.

2.5.4 Supporting MLE in South Africa: Universities and Teacher Education

Effective and sustainable education in African languages cannot occur without the systematic production of qualified and capable practitioners. Several universities have introduced courses for teachers that include or focus on African languages, either as additional languages for communicative purposes, or, more pertinently, as LoLTs.

- The University of the Western Cape has a Bachelor of Education (B.Ed.) degree that uses Afrikaans and isiXhosa in addition to English, as the Medium of Instruction (MOI) for parts of the course. The graduates of this programme go into service as FP teachers who will teach in these languages (University of Western Cape - Department of Language Education, n.d.).
- The University of Limpopo has a Bachelor degree programme, the BA CEMS: Bachelor of Arts in Contemporary English Language Studies (CELS) And Multilingual Studies (MUST) (University of Limpopo, n.d.). One of the aims of the programme is to stimulate the production by the students of resources in Sepedi (and later, in other African languages). Students graduating from this programme are expected to be competent multilinguals, able to convey an understanding of multilingualism, and conduct research in and advocacy work for multilingualism (Ramani & Joseph, 2002). The two modules, CELS and MUST, are equally weighted, with the latter being taught and assessed entirely in Sepedi. Even to date, the convenors of the programme claim that “no other degree [programme] combining English with an African language as media of instruction is being offered in South Africa” (University of Limpopo, n.d., n.p.).
- One of the outcomes of the Rhodes University language policy has been the development of vocation-specific courses in isiXhosa for students in fields such as

journalism, law and pharmacology, as well as education. As of 2015, approximately 500 students at Rhodes University were studying isiXhosa – or in isiXhosa (Docrat & Kaschula, 2015).

- Since 2011, the University of KwaZulu-Natal has produced several PhD graduates whose theses were researched and written entirely in isiZulu (Jansen, 2015). A recent postgraduate thesis provides an extensive overview of the language policies in existence across the South African university landscape (Nudelman, 2015).

There remains a long way to go before the South African education system has sufficient throughput of adequately trained teachers to help drive attainment of the goals of the LiEP. The work of creating courses *in* African languages, specially designed to aid primary school pedagogy in African languages, is still to be done and rolled out across tertiary institutions.

2.6 Understanding Language Policy

It is very important to have a useful framework or two through which to understand and analyse language policy.

2.6.1 Spolsky's Three-Fold Characterisation

Spolsky (2004) has identified three main aspects of language policy: ideology, management and practice.

- Ideology reflects people's actual beliefs about language(s), relating to the use and suitability of languages and their forms for them and for others. The most salient aspects of belief about language relate to the values that are assigned to certain features and varieties of language. While beliefs may (of course) be inconsistent, and may not align with practices – e.g. it is possible for people to use a form of a language that they themselves consider stigmatised, for various reasons (Spolsky, 2007).
- Management refers to efforts, usually by those with some level of formal authority, to influence and direct the ways in which language practices (and ideologies) are maintained or modified. Language management occurs at multiple levels, from the individual deciding what language or variety to speak in a particular context, to the choices made within a family to the macro-level, such as the way in which a state assigns

official status to particular languages (and not to others) and determines their usage (Spolsky, 2009).

- Practice encompasses what actually happens, i.e. what people actually do with language in the various environments in which they live, work and play (Spolsky, 2005). This is in many ways the easiest of the three aspects to study and evaluate, as it is usually fairly directly observed, the so-called "observer's paradox" notwithstanding. Importantly, practice usually reflects the "real" language policy, although speakers may hesitate to admit this (Spolsky, 2009, p. 4).

There is a strong mutual interplay that occurs among these three aspects: practices tend to shape beliefs and reinforce or redirect management choices / tools; beliefs influence practices and modulate the application of management tools; management also helps to shape beliefs and is intended to influence practices directly.

Spolsky (2004) has further identified four forces that he regards as being found universally to act on language policy. These forces are national ideology; English a global language; sociolinguistic situation; and minority rights.

Generally understood as a precursor or an input to a language ideology and, ultimately, management and practice, national ideology refers to the beliefs that a people have about their nation. An example is the perceived presence or absence of a '*Great Tradition'*, which in post-independence countries has a significant influence on the national choice of dominant or official language (Albury, 2012; Spolsky, 2004). The significant and growing dominance of English is a worldwide phenomenon (Cogo & Jenkins, 2010). Given the economic aspirations of many people, and the association of English with those aspirations, it is unsurprising that, without formal or deliberate direction from an identifiable source, English is being preferred by many as a foreign language worth learning (Dalvit et al., 2009; S. Wright, 2009).

According to Spolsky (2004, p.219), "the number and kinds of languages, the number and kinds of speakers, the communicative value of each language both inside and outside the community" are all influences on the language policy. Both actual practices and beliefs (i.e. ideology) are relevant to an understanding of the situation. The presence and vocal strength

of minorities is a significant influence on the ways in which language policy is played out. Various struggles for recognition of human rights, particularly throughout the 20th century, have made minority issues difficult to ignore (Albury, 2012). This is particularly the case for South Africa, where accommodation of minority rights was specifically negotiated in the drafting of its Constitution. This accommodation has had particular implications for language policies in the democratic South Africa (Alexander, 2004).

2.6.2 Alternatives to Spolsky's Framework

It is worth reviewing a few alternative frameworks for understanding language policy. An orientations model attempts to account for the role played by attitudes towards languages and their role in society (Ruíz, 1984). There are three key orientations: the *language as problem* orientation, in which local / minority languages are viewed as problems preventing the incorporation of cultural and linguistic minorities into society, and are associated with social problems such as poverty; the *language as right* orientation, wherein these languages are considered to be basic human rights for their speakers, and which often leads to confrontation and conflict; and the *language as resource* orientation, in which these languages, together with all other languages, are seen as resources not only for their speakers but for the overall society, and in which their cultivation and use ought to be actively encouraged (Ricento & Hornberger, 1996; Ruíz, 1984).

A more comprehensive language planning and policy (LPP) framework has been presented by Hornberger, namely a six-dimensional framework: capturing policy planning (i.e. on forms of language) and cultivation planning (i.e. on functions of language) across three axes/categories: status planning, acquisition planning and corpus planning. These axes cover where and how language is used, expectations of and support for language users, and issues relating to the language itself, respectively (Hornberger, 1994). This framework has been enhanced by the use of a layering analogy, in which the "agents, levels, and processes of LPP in terms of layers that together make up the LPP whole" (Ricento & Hornberger, 1996, p. 408) are conceived as layers of an onion that affect and interact with one another in various, often complex, ways. The key layers are legislation and political processes, states and supranational entities, institutions and classroom practitioners (Ricento & Hornberger, 1996).

This framework, particularly if used in conjunction with Ruíz's model, is helpful in analysing LPP activities in terms of a range of LPP-related goals. This framework has significant descriptive and explanatory power, and may be relevant to the results anticipated here. However, it will not be used, mainly because there is significant overlap with Spolsky's framework, and also because it is somewhat narrower/more prescriptive than Spolsky. The primary indicator of this is the placement of classroom practitioners, i.e. teachers, at the core of the onion. There is no doubt that teachers are critical to the (non-)promulgation of any policy, but for my research I would not want to commence with the assumption that their role is as important to the constraints across the system as Ricento and Hornberger (1996) would suggest.

2.6.3 International Examples of Policy Formulation and Execution

Language policies are in place all over the world, and by extension so too are language-in-education policies. This is virtually a truism, as it arises from the fact that wherever a language is formally or officially in use (or wherever education is happening), a LiEP is in effect. To clarify this, a language policy "**implicitly or explicitly** is the main mechanism for manipulating and imposing language behaviours, as it relates to decisions about languages and their uses in education and society" (Shohamy, 2006, p. 47-48, emphasis added). However, for the purposes of this research report, it is useful to consider a few examples of explicit language policies for education, whether they exist as legislation, regulations, or guidelines. For each of the national or regional examples given below, the policy's formulation will be described, and then the notable features of policy execution will be outlined.

2.6.3.1 India

The second-most populous nation-state in the world, India, is home to speakers of over 1,600 languages. Although India has encountered significant external influences prior to British imperialism ("Persianisation" being the key example), the present-day influence and domination of English looms largest, despite the fact that competent English speakers are a very small minority in India – no more than 20% by the most generous estimates, and possibly as few as 1% (Bhattacharya, 2017). The 1956 Three-Language Formula (TLF)

remains the most influential and current national policy. This policy recommended the study of a modern Indian language alongside Hindi and English in predominantly Hindi-speaking regions; alternatively, Hindi, English and the regional language in areas not dominated by Hindi speakers (Bhattacharya, 2017). While an update report on the position of English in the Indian education curriculum does not constitute a new language policy, it does reflect the ideological posture of policy advisors, if not of policy-makers (National Council on Educational Research and Training [NCERT], 2006).

Although this document glibly dismisses the colonial history of English in India as "now forgotten or irrelevant" (NCERT, 2006, p. 1), it does still recognise the link between mother-tongue based education and the effective acquisition of proficiency for academic purposes. It also emphasises the necessities that will make MTE effective, such as substantial quality inputs such as books and media, and creative, competent and motivated teachers. In the time available, this author has been unable to locate a copy or detailed description of the TLF document, so it remains unclear as to whether this document centralises English in the same way that the NCERT document does. Its topic is of course the position of English in Indian education, but both the tone and the fact of the topic itself make it clear that English is the pinnacle language for Indian education. It is interesting to contrast the tone of the NCERT document with a perspective on what it takes to implement effective multilingual language policy. In highly multilingual settings such as India, it may be most appropriate to prefer an integrative approach to education, stressing the link between language acquisition and communicability, enabling one to fit into and exploit opportunities within one's social milieu (Khubchandani, 2003).

Policy execution in India has been something of a mixed bag. Broadly, the high status of English socially and commercially, and consequent significant demand for it by all strata of Indian society have contributed to inconsistent application of the TLF and to earlier adoption of English, to the detriment of the educational outcomes for poorly-prepared and poorly-resourced schoolchildren (NCERT, 2006). Furthermore, the domination of many local contexts by Hindi and English has exacerbated tensions given a "complex matrix of regional language politics" (Bhattacharya, 2017, p. 4). Despite this high demand for English, a number of factors – poor teacher training, inadequate teacher language skills, rote-memorisation, minimal allocation of time to language teaching, and low exposure to English

outside class – contribute to inadequate acquisition of English in most government-run primary schools. Intervention programmes aimed at developing and running MT-based multilingual education, often for children who speak so-called "tribal languages", occasionally appear. Despite various designs, they have been shown to generate better outcomes for these children than the default subtractive models found in most schools (Mohanty, 2012; Mohanty, Mishra, Reddy, & Ramesh, 2009).

2.6.3.2 Catalonia

Hawkey (2014) has comprehensively catalogued the key points related to the formulation of the language (in education) policy of Catalonia, as well as demonstrating an aspect of the effectiveness of the policy for the region. His paper is the primary source for this section. Catalonia is one of 17 autonomous communities (*comunidades autónomas*), which essentially can determine their own linguistic legislation, according to the Spanish constitution of 1978. In 1979, the Catalan government ratified its own first autonomy statute, and therein ensured both "the normal and official use of [Catalan and Spanish, taking] the measures necessary in order to ensure knowledge of them" (Catalunya, 1979, cited in Hawkey, 2014, p. 7). In this statute, the Catalan regional government also took on all authority for education in the region. Notably, the *Llei de Normalització Lingüística* (Language Normalisation Law, LNL) of 1983, placed Catalan on an equal footing with Castilian (Spanish) in education, although it emphasised that Catalan was to be the "normal language" of the education system.

The result of these legislative changes has been a shift to an education system in which Catalan is the MOI. The wide-ranging ramifications of the decision to make Catalan the MOI in Catalonia have been empirically demonstrated by innovative research that demonstrates the greater ability of younger residents of Catalonia – who were educated in Catalan – to identify non-standard usage of Catalan than older residents educated in Spanish (Hawkey, 2014). It is important to note that Catalan's high status in Catalonia has been supported by a range of measures, key among which was the decision to make it the main language of the education system.

2.6.3.3 Rwanda

Rwanda is an unusual African country in that it is virtually monolingual in terms of autochthonous languages. As many as 99.4% of Rwandans are fluent in Kinyarwanda, with as many as 90% speaking only this language (Samuelson & Freedman, 2010). However, like many African languages during and after the colonial period, even Kinyarwanda has suffered from "benign neglect" and has not been developed for widespread use in higher functions of commerce and culture. French retained its status as the language of power and status from independence until 1994, the year of the genocide (Samuelson & Freedman, 2010). The first four years of primary education were in Kinyarwanda, with a switch to French thereafter; a 1978 policy change extending Kinyarwanda medium education to the first eight years was reversed in 1991 after a dip in performance in French was detected (Trudell, 2016).

The return of refugees from surrounding (and mostly Anglophone) countries triggered the introduction of English alongside French. Also, partly because of suspicions that have lingered regarding the involvement of the French in critical events during and leading up to the genocide, and partly because of perceptions that Anglophone countries are more reliable socioeconomic supporters than France, the influence of French since 1994 has declined. Furthermore, many members of the now governing Rwanda Patriotic Front party are returned exiles from Uganda and Tanzania, whose command of English is therefore much stronger than French. This all culminated in 2008 in the replacement of French by English in the education system (Samuelson & Freedman, 2010; Trudell, 2016). Given that criticism of or dissent against government policy is not tolerated, and given the indications from the literature that policy changes have been decreed rather than debated or discussed (Samuelson & Freedman, 2010), it can be inferred that the process of policy development in Rwanda is broadly top-down and authoritative. Indeed, a Cabinet resolution was the source of this 2008 decision, which overrode the constitutional provisions (Pearson, 2014). The extent to which select experts and educators may have been consulted for their inputs is unclear.

The 2008 Cabinet decision to use English from the fourth year of primary school has had a number of effects on the education system. There have been concerns about the levels of

federal support and training for the new English-only regime, given that many teachers had relatively low proficiency in English. In addition, curriculum materials were perceived to be in short supply. In general, there has been differentiated, context-specific implementation of the policy based on the situation faced by and the characteristics of institutions, teachers, and their students (Pearson, 2014).

2.6.3.4 Namibia

Despite its relatively small population of under two million people, Namibia is a geographically large country with a diverse population speaking approximately 25 – 30 languages (Simons & Fennig, 2017; Trudell, 2016). In spite of the fact that English was never a colonial language in use in Namibia (that role was taken by German, 1884 – 1915, and Afrikaans until independence in 1990), it was declared the official language at independence with a view to unifying the nation and helping it to face and interact with the rest of the globe (Tötemeyer, 2010; Trudell, 2016). The language-policy document of 1992 guaranteed the equality of all thirteen national languages, regardless of number of speakers or level of development. It also called for the use of one of the national languages up to Grade 3, with the introduction of English as the MOI from Grade 4 onwards. However, it remained possible to use English from Grade 1 – as it is one of the national languages. In 2008, a new language policy was generated, as part of the drafting of the National Curriculum for Basic Education. The key additions were that ministerial approval was required for schools that wanted to introduce English from Grade 1, and that two languages were a requirement in the curriculum (i.e. at least one language other than English was required, as a subject, if not as the MOI) (Tötemeyer, 2010).

Despite deep and simultaneous changes to the education system almost causing a collapse (Tötemeyer, 2010), implementation of the LiEP appears to have succeeded in many parts of Namibia. About sixteen languages – i.e. beyond the number of national languages – are sufficiently documented for use in education and supported by relevant materials for education (Trudell, 2016). There continues to exist the challenge of principals who believe they have the right to decide which national languages – if any – to teach, irrespective of the languages that are in use in their areas (Tötemeyer, 2010).

2.6.3.5 Tanzania

Tanzania is a country comparable in geographic area and population to South Africa. Though it is somewhat smaller than SA, somewhere between 125 and 150 languages are spoken there (Tibategeza & du Plessis, 2012; Trudell, 2016). A distinctive feature of the linguistic landscape in Tanzania is the prominence of a trans-regional African language, Kiswahili. The LiEP, contained within the Ministry of Education's *Education and Training Policy* document from 1995, stipulates that the language of instruction for pre-primary and primary school is Kiswahili (Tibategeza & du Plessis, 2012). English is a compulsory subject throughout school. Other African languages are expected to be used and supported, and to support the development of Kiswahili. For secondary school, English is the language of instruction. This latter point does run counter to the thrust of broader language policies in Tanzania in previous years, such as the adoption of Kiswahili in 1962 as a national language, Kiswahili's adoption as the official language in 1967, and the abandonment of the Cambridge School Certificate exams in 1970, further emphasising Kiswahili's position as the pinnacle language in Tanzanian society (Tibategeza & du Plessis, 2012). Thus, the shift in February 2015 wherein the Tanzanian government abolished primary school leaving examinations and extended Kiswahili instruction to the first four years of secondary school is more in line with the prioritisation of Kiswahili (Trudell, 2016).

Researchers have, however, acknowledged that in Tanzania "Kiswahili is not actually the L1 for many Tanzanian primary school children" (Trudell, 2016, p. 77). Despite this, it has been recently officially named as the LoLT throughout primary and secondary school.

In summary, a number of notable features and inferences can be drawn from the examples shared above. Policy formulation in some places has striven to promote language equality on the back of a positive recognition of lingual and cultural diversity. Some success has been achieved, for example in Namibia, although the execution of such policy there and in India appears to have been hamstrung by ongoing prejudices and preferences for dominant languages. In most places, the effectiveness of policy implementation appears to depend strongly on the clarity and strength [i.e. status] of policy formulations. So, in India, where policy formulation has been rather weak, there are diverse manifestations of language-policy implementation, whereas, in Catalonia, the goal of all the Catalan-favouring

legislation (i.e. strong policy formulation), namely the normalisation of Catalan across the region, has been achieved. However, this relationship is not linear, as the example of Rwanda, where a strong Cabinet decision has not resulted in clear and unambiguous policy implementation.

2.7 Review of Policy Analysis Theory and Practice

Public policy and policy analysis have their roots in the fields of political science, management science and public administration (Parsons, 2005). As a distinct field, public policy may be considered to have arisen in the late 1960s from 1970s from proceedings of conferences run by the American Social Science Research Council, and from the establishment of the Policy Studies Organisation in 1972 and other associations and journals founded soon after (Henry, 1990, cited in Parsons, 2005, p. 28).

Policy design and formulation is thus a field that has been extensively researched for the past five decades. Traditionally, the participants in this process have been stratified into three camps: the "proximate decision-makers", i.e. those holding decision-making power for policy on behalf of the state or relevant governmental authority; the subject matter experts or knowledge producers in respect of a particular topic; and the so-called "knowledge brokers", those who often act as intermediaries between decision-makers and knowledge producers (Craft & Howlett, 2012).

A significant shift in the new millennium has been noted in the nature of the terrain in which policy is made. The dispersal of political power beyond the state and its machinery, to multinational corporations, consumers, NGOs, pressure groups, the media and citizens, has meant that "speaking truth to power" is no longer an activity typically directed at a single entity, the state (Hajer, 2003, cited in Craft & Howlett, 2012, p. 85). This reveals the insight that most "policy-making and policy analysis was always conducted with an idea of a stable polity in mind" (Hajer, 2003, p. 182). Thus, in the new dispensation, a more partnership-oriented, network-based process of policy advocacy and policy-making is a necessity.

The success or failure of policy may be considered dependent not only on the ability of a government to formulate policy that effectively addresses an issue in society, and on its

ability to marshal sufficient resources to execute the policy, but also on its capability in managing the various actors that are involved in realising the policy in the domains and among the people who are to be [positively] affected by it (van der Steen, Scherpenisse, Twist, & 't Hart, 2015). As suggested above by Hajer (2003), the policy-making entity often does not have direct authority over these actors, and so it must influence and steer them in the appropriate direction (van der Steen et al., 2015).

In addition, notions of blame, blame avoidance, credit and credit claiming feature significantly in the calculations of politicians, particularly when it comes to policy-making that may be considered risky or innovative (Leong & Howlett, 2017). This means that the implementation efforts of policy-making authorities may be designed in such a way as to minimise the possibility of being blamed for failure, or to maximise the opportunity to take credit for success, rather than to optimise the chances of success.

In many instances, an integrative, holistic perspective on policy has been developed and encouraged, as a response to observed fragmented and ineffective government action to address public issues (Cejudo & Michel, 2017). This has applications across the many policy areas, such as security, environmental issues, poverty eradication and education. The key point is for policy-makers and advisors to recognise when they are dealing with a complex problem that requires coordination and integration involving several different types and levels of entities relevant to policy formulation and implementation.

The actual relationship between policy-makers and researchers, particularly those associated with academic institutions, does not always receive much attention. And yet, the disconnect between policy research and policy implementation is wide and has been observed to increase over time (Mead, 2015). There are a number of reasons for this, some of which have been documented (Daviter, 2015; Doberstein, 2017; Mead, 2015; Öberg, Lundin, & Thelander, 2015). Policy-makers – typically bureaucrats and politicians – face constraints and decision-making criteria that scholars do not ordinarily face. These constraints tend to limit the scope for action. Politicians involved in policy-making processes often do not have sufficient exposure to all of the possible courses of action. They have a "bandwidth" challenge – in many polities, there is simply too much expert research and content to be consumed and not enough time, and policy-makers must

employ some sort of content-reviewing filter, which is not necessarily sophisticated (Doberstein, 2017).

Furthermore, they are constrained to dismiss early and conservatively any options that could be considered to be politically infeasible (Öberg, Lundin, & Thelander, 2015) . Importantly, they need to meet political and often moral standards, which are fundamentally different from the intellectual standards faced by scholars. Thus, "their fundamental need is to pick the best course of action and then—just as important—make a case for it in the public arena" (Mead, 2015, p. 261). In addition, policy decisions are also made in the light of the likely consequences of the decision for political power and control (Daviter, 2015). While this is a game that academic researchers are usually loathe to participate in (Daviter, 2015; Mead, 2015), an understanding of these varied motivations is presumably essential in gaining the trust of policy-makers and in pushing them towards taking optimal policy decisions, despite challenges and resistance that may be encountered.

2.8 Conclusion

The education sector in South Africa faces a number of significant challenges that are linked to the country's difficult political history. The issue of language policies and language use in education is one of these challenges, and it is severely complicated by many of the other challenges. The findings of linguistics researchers indicating that (1) multilingual education is not only not harmful, but definitely beneficial to schoolchildren and feasible in developing countries; and (2) additive bilingualism is practical, optimal and most effective with eight years of MTE, are difficult to refute. A number of efforts are being undertaken at various levels in the South African education sector to demonstrate these benefits and feasibilities; however, at the centre, the system remains unaccommodating of the majority of South African children, whose mother tongues / preferred languages are languages other than English (or Afrikaans).

A brief survey of language policies in other polities indicate the connection between language equality and lingual / cultural diversity, as well as the power of ongoing prejudices and preferences for dominant languages. There also appears to be a positive association

between the status of policy formulations and effective policy implementation, although this relationship is not necessarily linear.

Spolsky's three-fold language-policy approach provides a useful heuristic by which to identify and critically assess the constraints that are occurring in the education sector. This is the focus of this research report. Finally, an understanding of the theory and practice of general policy formulation and analysis is important to help us appreciate the incentives, disincentives and constraints faced by policy-makers, and what it may take to convince them to take the necessary relevant action.

Chapter 3 – Research Methodology

3.1 Introduction

This section discusses the research methods used.

Broadly, there are two methodological research approaches that could be considered in social science research: quantitative research and qualitative research. Quantitative research is appropriate for relatively narrow, specific (i.e. closed-ended) questions, and it requires systematic data gathering from an appropriately sized sample of the relevant population. Qualitative research is by its nature less prescriptive and, where applicable, smaller sample sizes are generally more acceptable than those required in quantitative research (Laher & Botha, 2012). The nature of the research question asked in this study (i.e. broader, open-ended) makes it amenable to exploration using qualitative methods.

There are three fundamental methods for data-gathering in social science research, including public policy research: observations, interviews and document [or artefact] analysis (Nieuwenhuis & Smit, 2012). Observation is most appropriate to help uncover insights and improve understanding with respect to the interactions between participants, and the organisation of settings in which relevant events occur, and to reveal how practices are established, maintained and changed over a period (Kawulich, 2012). In the context of the research question that I have in mind, however, observation is not appropriate for a number of reasons.

First, even given very selective sampling, the scope of the research question would necessitate a significant number of observations across the entire province of Gauteng (the epicentre of the research), if not the entire nation of South Africa. Related to this, the time available for the research does not allow for an extensive amount of time to be spent on observation. Second, many of the observations are not available in the present, i.e. the observations are of events that have already occurred, and therefore they are available to me only through the written or spoken testimonies of others. Thirdly, the observation of a conceptual phenomenon, such as a constraint acting on a policy, is not usually explicit or direct, and so requires a level of interpretation within a framework. A final point worth

noting is that observation does require a significant amount of attention to detail (Kawulich, 2012), which implies high levels of access to all the relevant players, in this case, policy-makers, educators, SGBs, teachers, academics, and even learners. Gaining this level of access was not possible for me in the available time frame.

Interviews are important and distinctive sources of information for qualitative research. They allow the researcher to obtain data and generate insights into the ideas and beliefs, opinions and decisions, experiences and behaviours of interviewees and others involved in the studied phenomenon. Done correctly, an interview can provide information that cannot be collected in any other way (Nieuwenhuis & Smit, 2012). This includes observations that have been made by the interviewee over a period of time, given his/her "privileged position" as a participant in the studied phenomenon. Thus, given the research question which focuses on policy constraints, interviews are an appropriate method to use. Furthermore, it was prudent to focus the search for interview candidates on those participants who were likely to have a holistic and long-term view on the system as a whole, and who, therefore, could describe the constraints succinctly and accurately.

Document analysis is "the analysis of any type of document for the purpose of gathering facts" (Pershing, 2002, p. 37). It is especially germane to the research question of this research report, as it is hypothesised that a number of constraints against the implementation of the LiEP arise directly from the text of that document itself. It is further relevant because the field of education policy and practice is characterised by production and dissemination of documents.

3.2 Research Framework

There are several theoretical and applied frameworks for language planning, language policy and LPP. These have been discussed in a previous section (Chapter 2). Based on the arguments presented there, Spolsky's three-fold characterisation of the elements of language policy is employed as the main framework for this research (Spolsky, 2004, 2007). Where appropriate, aspects of Hornberger's LPP framework with "onion" metaphor enhancements may also be employed (Hornberger, 1994; Ricento & Hornberger, 1996).

3.3 Research Objectives

The objectives of the research are to identify and articulate the specific constraints that have challenged progress towards the realisation of the aims of the LiEP of South Africa. The articulation is aimed at explaining as far as possible why these constraints have been so "sticky", i.e. why they have persisted and have been only partly overcome, if at all. The applied research methods, together with a review of the literature (particularly comparative review of other nations and regions) and some creative thinking, will result in the proposition of approaches and actions – some new, some previously proposed and here affirmed – that could be taken to eliminate or "unlock" at least some of these constraints and drive progress towards LiEP realisation.

3.4 Research Design and Implementation

Given the research questions and the framework that has been applied, it was appropriate to apply two key research approaches. First, to assess the ideology- and management-level constraints affecting the LiEP, the LiEP document itself was subjected to a detailed analysis. This process is usually referred to as content (or documentary) analysis. Second, interviews were conducted with experts and officials who had the relevant status and experience in the language-in-education field. The objective of these interviews was two-fold: 1) to verify (or counter) the on-paper identification of constraints at the ideology and management levels, and thus to flesh out a critical perspective on the LiEP on paper; and 2) to determine some of the key constraints at an implementation (i.e. practice) level which, broadly, occurs in public. The open nature of the research question meant that a qualitative, interview-based approach was more appropriate than a quantitative, survey-based approach.

3.4.1 Documentary Content Analysis

For an assessment of the LiEP on paper, the method employed was content (documentary) analysis, focused on the LiEP itself. Because the policy already exists, and as of March 2018 is not presently under review (to the best of the researcher's knowledge), a traditional policy analysis process (e.g. the six-step policy analysis suggested by Jansson (2008) was not undertaken. Rather, a content analysis was required. This is, broadly, an approach in which

the text of a document is assessed in detail: the content (text) is closely parsed, keywords and other features of the text (such as sequences, structures and emphases) are identified, and, if appropriate, the content is coded into themes and topics (Silva, 2012) (See also the section on interview design for more on coding). For content analysis for a policy document, the stated objectives of the policy and the effective objectives of policy (as determined from the content analysis) were also compared. Furthermore, the underlying theoretical and ideological assumptions underpinning the policy were also teased out and assessed.

The researcher also reviewed selected publicly-available documentation reflecting mainly official attitudes (a) about the LiEP, (b) relating to the choice of MOI in schools and (c) relating to the perceived appropriateness of black African languages as MOI in South Africa.

3.4.2 Interview Design and Process

Preparation for the interviews began with the commencement of the research for the literature review and for the formulation of the problem statement and research questions, as well as for the selection of the chosen framework. From this research and the framework, a number of question areas arose. These areas included: scene-setting; LiEP verification (interviewee's familiarity with LiEP and perspective on LiEP status); inquiry against elements of the framework; constraints against policy implementation (i.e. direct questions about constraints, linking constraints to Spolsky's framework); educational and social environment (i.e. indirect questions about constraints). The questions relating to the framework were typically indirect, i.e. they did not explicitly reference Spolsky's framework, and, in most instances, did not even include the words ideology, management or practice, in order to allow the themes and their respective categorisations against the framework elements to emerge in coding as naturally / independently as possible. Questions were constructed based on these areas and fleshed out to cover as much ground as one could hope for within 60-75 minutes. This time frame was selected as the most that one could reliably and reasonably hope for, and sufficient for covering a wide range of questions without becoming repetitive (Nieuwenhuis & Smit, 2012).

The interview guide was then tested with the first interviewee, considered a "friendly participant". This experience allowed for modification of the questions as well as the

approach in asking the questions (Krauss et al., 2009), and thus helped to improve the reliability of the questionnaire, i.e. it was more likely that the interviewees would correctly interpret the questions and respond accordingly (Mentz & Botha, 2012). In practice, I was selective about which questions I put to respective interviewees, based on their backgrounds, their preferences and the directions in which the responses took us. This meant that these interviews were, in fact, semi-structured interviews (Nieuwenhuis & Smit, 2012).

The initial sampling was purposive, based on contacts that the researcher already had already made (Neuman, 2011). Thereafter a snowball sampling methodology was employed (Babbie, 1998; Neuman, 2011). Care was also taken to minimise the effect of reactivity on the process and outcome of interviewing, by remaining as neutral as possible as the participants responded to interview questions (Mentz & Botha, 2012). It was especially challenging to obtain permission and find opportunity to conduct the interview with the government official. Other interviews were conducted in the interim, and when "saturation point" was reached, i.e. little in terms of new insights was generated, no further interviews were conducted. A total of eight interviews were successfully conducted, including one with the government official.

3.4.3 Data Analysis

A coding process was adopted from the literature, and adapted to suit requirements and available data (Vogel, 2006). In brief, the interview transcripts (where available) and notes were repeatedly parsed, and specific concepts, topical markers and themes were identified and refined in an iterative fashion. Concepts were typically specific to the field (e.g. additive bilingualism) and the process of drawing these from the interviews was helpful in giving context to the themes, as well as producing relevant working definitions of terms, as required. Topical markers were generally useful in contributing to specific pieces of research, and so were incorporated, where appropriate, into the relevant sections of the literature review or results chapters. An example of a topical marker is *Cofimvaba*, the pilot programme extending the use of isiXhosa as a LoLT beyond Grade 3. Themes, as to be expected, were typically topics, and therefore larger than concepts and generally not technical terms. Initially, these were not categorised directly against the ideology /

management / practice framework, in order not to constrain their development and refinement as the coding process. From an initial list of approximately seventeen themes, several themes were merged, reorganised and prioritised, to result in fewer than ten.

Two types of content were coded: manifest content and latent content (Babbie, 1998). Manifest content is the audible content of interviews – what is said and discussed by the participants. Latent content is the underlying significance and meaning of what is expressed. Because this requires a subjective assessment from the researcher, it is somewhat less reliable, but is nevertheless relevant. Special effort was made to look out for themes that reflected underlying, perhaps hidden, power dynamics (Dowding, 2006). Themes of apparent significance were sought out and identified, as reflected in the documentation through emphasis and repetition, particularly from different perspectives and parties (Babbie, 1998). The question *"Who stands to win and who stands to lose if things change or if they remain the same?"* was frequently borne in mind as a heuristic device.

3.4.4 Methodological Integrity

For a highly qualitative, interview-based approach such as the one that I have taken for a significant part of this research, the key validity concern is that of internal validity. While a number of factors typically affect internal validity – the extent to which conditions within the research parameters may affect participants and (therefore) outcomes (Mertler, 2012) – for a semi-structured interviewing process, the main factor likely to affect internal validity would be the passage of time. Most of the interviews were conducted in 2015, about two years ago at the time of writing. While it would be preferable for the interval to be shorter, the absence of significant policy changes and the efforts to triangulate the findings with secondary research provide comfort that the findings remain valid at this time.

The research methodology plan was checked against the Ethics in Research policy guidelines of the University of the Witwatersrand, and it was found to conform with these guidelines. I am aware of no breaches of ethics guidelines per the policy guidelines.

Interviewees were informed that their interviews would be recorded only for research purposes (i.e. to allow the researcher to transcribe the interviews, and to enable a more

thorough process of analysis, coding and interpretation of the results). Because at least one of the interviewees asked to remain anonymous, all of the interviewees and their contributions have been anonymised, with the exception of the government official. Given that I had to go through formal channels to obtain official permission to interview this government official, the issue of anonymity was made effectively moot. In any case, the highly distinctive insights provided by this official from his unique role and vantage point in the department would have rendered anonymising him ineffective.

3.5 Conclusion

Two fundamental approaches were adopted in this study, both of which are qualitative at base. The two methodologies were interviewing and documentary analysis. The phenomenon at the centre of this study – constraints affecting effective policy implementation – is one that is challenging to assess quantitatively. Indeed, the nature of examining constraints, limitations or non-implementation is historical, and therefore most likely to be done effectively by getting testimonies (written or spoken) of those who have been observers of or participants in the policy programme.

The selected framework of policy ideology, management and practice, following Spolsky (2004), helped with the appropriate selection and formulation of questions for the interview guide. Detailed documentary analysis was prepared and applied to the LiEP, and also to at least one other document from the Department of Basic Education (DBE). Issues of methodological integrity and limitations were also discussed.

Chapter 4 – The Policy on Paper

4.1 Introduction

This chapter presents the results of the policy analysis conducted on the LiEP of South Africa. As outlined in Chapter 3, the primary approach to this analysis was content [documentary] analysis. Two secondary approaches were also included. First, the cross-referencing of the content of the LiEP with other contemporary and subsequent language policy and education policy documentation was also conducted, in order to enhance understanding of the latent content contained therein. Second, interview analysis was performed on the interview conducted with an official from the DBE. In addition, findings are also included from the other expert interviews that relate to constraints arising from the policy as set out on paper. The results of these analyses are presented here and discussed, with an emphasis on the implications from a policy ideology and policy management perspectives, within Spolsky's framework of three main aspects of language policy.

4.2 Context and History of the LiEP

In December 1995, the Minister of Arts, Culture, Science and Technology announced the establishment of the Language Plan Task Group (LANGTAG). The purpose of this group was to "advise the Minister who is responsible for language matters on devising a coherent National Language Plan for South Africa as a matter of urgency" (LANGTAG, 1996, p. 1). That the scope of work for this Task Group would extend well beyond education was clear not only from the purpose stated above, but also from the stated motivations for its creation, namely (1) observed intolerance of language diversity and "the resultant 'multilingualism is a costly problem' approach evident in some sectors of our society weighed against the fundamental importance of language empowerment in our democratic society; and (2) the growing criticism from language stakeholders of the tendency to unilingualism *[sic]* in South Africa" (LANGTAG, 1996, p. 2). Furthermore, the goals for LANGTAG included the development of all African languages in such a way that their speakers could achieve "access to all spheres of South African society", and the establishment of "equitable and widespread language facilitation services" (LANGTAG,

1996, p. 2). A group of highly-regarded academics, language planners and interpreters was appointed to LANGTAG, and Professor Neville Alexander was selected by the members to chair the group.

Over the course of just eight months, ending in mid-1996, the LANGTAG researched and developed a framework that would guide the creation of a National Language Plan (NLP) across a number of sectors across society, including education. The members of LANGTAG were well aware that a language-policy development process was occurring in the Department of Education (DoE) at the same time (Heugh, 1999), and committee members were co-opted in both directions in order to coordinate and align these processes (LANGTAG, 1996). In addition, the committee responsible for education within LANGTAG included senior members of the DoE, which means that this Department's leadership was well aware of all three streams of activity: the new curriculum development, the LiEP development, and the NLP framework development in LANGTAG (Heugh, 1999).

Researcher Thobeka Mda (1997) describes the situation rather differently: according to her, the education committee in LANGTAG, the Language Policy in Education Committee (LPEC), was directly responsible for the development of the LiEP. This LPEC itself comprised "representatives from the Coordinating Committee for School Curriculum (CCSC), South African teacher organisations, provincial language representatives, and the newly created School Programs Section of the [DoE]", and all its members were appointed by the Deputy Director-General of the same DoE (Mda, 1997, p. 370). The former entity, the CCSC, had taken it upon itself to develop a draft language policy, which it shared with the rest of the committee for review in November 1995. A number of highly-charged debates took place within this committee, and the South African public was allowed to make input to a revised draft of the policy document (Mda, 1997). However, it is unclear how these debates or the consultations with the public contributed to the progress in the policy development. In any case, by July 1997, the LiEP was finalised and announced (Mda, 1997; RSA, 1997). Whether one accepts Heugh's or Mda's version of events, it is clear that the DoE had a full "360-degree view" of events at the time.

Despite this knowledge within the DoE, there was effectively no convergence of these processes on any level, and thus the new Curriculum 2005 was announced a few months

before the LiEP, with no reference to, let alone pedagogical reliance on, a yet-to-be-finalised LiEP. In an apparent attempt to gloss over this reality, a draft of the LiEP was tacked on to the new curriculum as a formality (Heugh, 1999). Because of its involvement in LANGTAG, the Department knew that language policy matters needed to be integrated with curriculum development. This wilful neglect reflects for Heugh (1999) the interplay of political expediency and larger structural social forces that drive the favouring of already-dominant languages.

As will be noted in more detail in later sections of this chapter, the LiEP was left devoid of any mechanisms to direct its implementation. The LANGTAG report explicitly deferred the task and definition of implementation to the DoE and PanSALB, while the LiEP text itself acknowledged that the imminent new curriculum (Curriculum 2005, scheduled for implementation from 1998) would necessitate "new measures" (LiEP, lines 11-13), and that the delivery system for the additive approach to bilingualism would be determined by comparative research (LiEP, lines 46-47).

4.3 Overview of the LiEP Document

The LiEP document is dated 14 July 1997, and is a four-page document comprising 1,907 words. This is the document that is available from the website of the DBE. The DBE official confirmed that this is the current policy document, and that there have been no amendments or updates made to it since 1997 (DBE Official, personal communication, April 3, 2017).

The LiEP document consists of three main sections:

1) An introductory segment that names and gives context to the two policies that follow;
2) The first policy, namely the LiEP in Terms of Section 3(4)(m) of the National Education Policy Act, 1996 (Act 27 of 1996); this includes a preamble that lays out a fuller background of the South African sociolinguistic landscape, and explains the paradigm within which the policy is set;
3) The second policy, the Norms and Standards Regarding Language Policy published in terms of Section 6(1) of the South African Schools Act, 1996.

Sections are numbered throughout the document. However, it appears that there are several overlapping or nested numbering systems, which could make it difficult for the reader to delineate the sections and follow the flow of the document. Ignoring the numbering altogether could also lead to misconstruing the flow of the document and the links from one section to the next. Thus, in the analysis that follows the numbering system has been interpreted (i.e. revised) in the most natural and neutral way possible.

In order to describe and analyse the constraints to effective policy execution most systematically and comprehensively, the selected approach is to take these three major segments of the LiEP document each in turn, first describing the segment's contents in detail, and secondly analysing the constraints contained therein under the headings of *Constraints of Policy Ideology*, *Constraints of Policy Management*, and (where applicable) *Other Constraints* that are difficult to classify as ideological or management-based.

4.4 Introductory Segment

There are three paragraphs numbered 1-3 in the introductory segment. Paragraph 1 explains that a wide range of participants including the public have discussed and debated the documents, following publication of the documents two months earlier. Since the period of transition in the early 1990s, South African political process, including policy formulation, has been characterised by deliberation, negotiation and public participation (Buhlungu, 2005). Although the paragraph does not explicitly state as much, it can be reasonably inferred from the phrase "[these policy documents] have also been the subject of formal public comment" (LiEP, lines 3-4) that the intention is to imply that the documents had been influenced and modified as a result of these deliberations and inputs from the public.

Paragraph 2 names the policies, invoking the relevant sections of the respective legislative Acts that require them and give them legitimacy and force. The paragraph also notes that the two policies are complementary "and should at all times be read together rather than separately" (LiEP, line 10).

Paragraph 3 indicates that Section 4.4 of the LiEP relates to the "current situation" and notes that the on-going development of a new curriculum, due the following year (1998)

will require “new measures [to be] announced in due course.” (LiEP, lines 12-13) It has been noted by some authors, notably Kathleen Heugh, that the fact that the LiEP was developed essentially in parallel to the new curriculum (“Curriculum 2005”) was a major “blind spot” in the macro education planning processes of the late 1990s (Heugh, 2000, 2013). Specifically, the language specialists involved in the process of creating the LiEP were excluded from all curriculum development processes (De Klerk, 2002; Heugh, 2013). There is, in this paragraph, an implicit recognition of this defect, with a proposal that another policy-making process (“new measures”) should follow and create the necessary link between the language policy and the curriculum. Indeed, according to Heugh, this follow-up to the LiEP – a “language in education implementation plan” – was never finalised, even though significant explanatory text that clarified the application of additive bilingualism was taken out of the LiEP, with the intention that it would be found, more appropriately, in the implementation plan (Heugh, 2013, p. 219). The Section 4.4 that is referred to in this paragraph occurs in the next major section of the document, the LiEP, which is analysed below.

4.4.1 Constraints of Policy Ideology

This introductory section of the policy illustrates the existence and impact of two significant constraints affecting the effective implementation of policy in South Africa. One of these constraints is ideologically based. This constraint is the consultation-based approach to policy development in South Africa. There are two competing thrusts within this approach. The first is the pressure to achieve genuine, effective consultation that helps to confer legitimacy on decisions made and policy developed. The other thrust is the obligation to define effective policy in an environment that is replete with multiple conflicting perspectives and competing interests. The overall effect of the difficulties with this approach is reflected in the relatively short period of two months during which public comment was invited (LiEP, line 4), and by the second constraint, which is a policy management constraint, and is discussed below.

4.4.2 Constraints of Policy Management

A critical constraint to the LiEP implementation is the timing of the formulation of this policy, relative to other developments in the education policy development realm. Paragraph 3 explicitly states that the new curriculum, due for implementation "from 1998 [i.e. the following year], will necessitate new measures which will be announced in due course." (LiEP, lines 12-13) As has been observed by Heugh (2013), this parallel development of language policy on one side and curriculum on the other meant that language policy was omitted from curriculum development. The development of any curriculum logically contains within it the promulgation of a language policy, whether explicit or implicit. In the case of South Africa's new curriculum in 1998, this language policy was implicit, as the curriculum development pointedly excluded those who had contributed to the LiEP, and there was no language-focused component within this curriculum development process (De Klerk, 2002; Heugh, 2000).

The effect of this omission of language specialists was the immediate side-lining not only of the LiEP, but also of virtually all further deliberations about language policy within education, and, crucially, the inevitable preclusion of any effective dissemination of the LiEP's content and precepts with the new curriculum. This can be reasonably inferred not only from the absence of language-policy discussion or decisions within the new curriculum of 1998 (Curriculum 2005), but from the continuing absence of this dimension from two later revisions of that curriculum (Heugh, 2013). The new curriculum's promoters – including some from the same DoE that spearheaded the LiEP – appeared to have no need, no motivation and no compulsion to drive the implementation of the LiEP alongside the implementation of the curriculum. They simply did not "see" the LiEP in any meaningful way.

There is one more observation to be made here. The "new measures" which were to "be announced in due course" (LiEP, lines 12-13) were never, and (as of August 2018) have not been, announced. While it is difficult to determine the exact reason(s) for this twenty-year delay, the fact that the LiEP was effectively side-lined is surely at least a major contributing factor. In support of this view, Interviewee D affirmed that curriculum policy "loomed larger than anything else on the South African schools' agenda", so that the introduction of the

new curriculum in 1998 meant that education officials gave no further attention to the LiEP. The DBE interviewee said much the same thing from his more recent perspective, stating that the introduction of NCS-Curriculum and Assessment Policy Statement (CAPS) had resulted in the further marginalisation of the LiEP (DBE Official, personal communication, 3 April, 2017).

4.5 Language in Education Policy in terms of Section 3(4)(m) of the National Education Policy Act, 1996 (Act 27 of 1996)

4.5.1 Preamble

The preamble to the policy approaches 500 words, which makes it longer than the rest of the text of the policy (almost 400 words). This is unusual in at least two ways: firstly, documents that support legislation, such as policies or regulations, do not typically include formal preambles. Secondly, the length of the preamble does not normally supersede that of the statute or policy it precedes (see, for example, Constitutional Assembly of South Africa, 2011). However, the contentious and fractious nature of the history of language and education in South Africa is not very much in dispute (Du Plessis, 2003). It is this tendency to conflict and controversy (Alexander, 2004) that appears to make a long and nuanced preamble necessary. The text of the preamble itself makes this point by stating that policy in this area in SA "has been fraught with tensions, contradictions and sensitivities" (LiEP lines 25-26; see discussion of point 5.2.2, below).

In addition, there is recognition in the first lines of the preamble that the LiEP document is part of a "continuous process" of the development of a NLP. The paragraph following the preamble also notes the existence of a "more fluid relationship between languages and culture" (LiEP, line 51) than occurs in some other places, such as Europe. This is significant in that the natural consequence of high levels of multilingualism in a society is the higher propensity for cultures carried by those languages to mix and blend at both an individual and a societal level.

There are six numbered points in the preamble, after its first paragraph. The points are stated (in italics) and then discussed in the following section:

1) *5.2.1 In terms of the new Constitution of the Republic of South Africa, the government, and thus the Department of Education, recognises that our cultural diversity is a valuable national asset and hence is tasked, among other things, to promote multilingualism, the development of the official languages, and respect for all languages used in the country, including South African Sign Language and the languages referred to in the South African Constitution.*

   The acknowledgement of cultural diversity as an asset is taken from the South African Constitution (Constitutional Assembly of South Africa, 2011), in whose first Chapter ("Founding Provisions") is a section specifically on language. This section of the Constitution implicitly endorses multilingualism, and explicitly promotes development and respect. Notably, however, neither the Constitution nor the LiEP makes any attempt to provide a conceptual or a "working purposes" definition of multilingualism. It is possible to assume that "development of the official languages, and respect for all languages used in the country, including South African Sign Language and the languages referred to in the South African Constitution" – i.e. the rest of the point 5.2.1 following the word "multilingualism" – can be taken as a conceptual, or even "working", definition. However, this position is difficult to defend on either count: terms such as "development" and "respect" in this context may be too vague to be useful even for a working definition, and certainly for a conceptual one. Nevertheless, the explicit injunction to promote development and respect confers both a strong constitutional mandate and a strong constitutional obligation on the government demonstrably to drive multilingualism in a formal, official capacity.

2) *5.2.2 The inherited language-in-education policy in South Africa has been fraught with tensions, contradictions and sensitivities, and underpinned by racial and linguistic discrimination. A number of these discriminatory policies have affected either the access of the learners to the education system or their success within it.*

   The inherited LiEP that is being referred to above is that encapsulated within the Bantu Education Act of 1953. This piece of legislation provided for MTE in (seven)

officially recognised African languages for black African children for eight years, up to the end of primary school. This legislation generated much controversy and suspicion. While on one hand it was forcefully argued that MTE was a benefit for children, on the other hand doubt was expressed about the motive of the apartheid government in extending the provision of MTE and effectively delaying the introduction of education in the dominant economic languages, i.e. English and Afrikaans (Mahlalela-Thusi & Heugh, 2002). In essence, the view of researchers such as Mahlalela-Thusi and Heugh (2002) is that the apartheid government pursued the right pedagogical MTE approach for the wrong reasons, namely political and socioeconomic oppression. Protests against the growing imposition of Afrikaans ahead of English in black African schools led to the 1976 school riots, and resulted in a policy change that led to the reduction of the MTE period from eight years to four (Heugh, 2000).

3) *5.2.3 The new language in education policy is conceived of as an integral and necessary aspect of the new government's strategy of building a non-racial nation in South Africa. It is meant to facilitate communication across the barriers of colour, language and region, while at the same time creating an environment in which respect for languages other than one's own would be encouraged.*

This is the first point to highlight directly the importance of the LiEP to South Africa's new path and aspirations as a country. Specifically, the LiEP is seen as an integral instrument to enabling successful communication across apartheid racial barriers, resulting in productive dialogue and inter-cultural respect. The LiEP is intended to form part of an environment conducive to these developments. It is worth noting that the role of the LiEP is construed here in a somewhat limited manner. It is seen (only) as an element of deracialised nation-building, a tool for communication and the creation of an environment conducive to linguistic respect. Nothing is said of its role in promoting access across the spectrum: to justice, to institutions and services of government, or to economic opportunity. One could argue that this is implicit in "building a non-racial nation"; nevertheless, it is telling that in the entire policy, the term "economy" (this includes related terms such as "economic", "business",

"industry" / "industrial", and "commerce" / "commercial") occurs only once (as part of the first aim of the LiEP (section 5.5.1, Line 59)), and the term "justice" does not occur at all.

4) *5.2.4 This approach is in line with the fact that both societal and individual multilingualism are the global norm today, especially on the African continent. As such, it assumes that the learning of more than one language should be general practice and principle in our society. That is to say, being multilingual should be a defining characteristic of being South African. It is constructed also to counter any particularistic ethnic chauvinism or separatism through mutual understanding.*

   The point being made here is a strong political and cultural challenge to the Western / Eurocentric monolingual normative model (Ouane & Glanz, 2011), as well as a factual statement. What is referred to as "[t]his approach" is the approach described in 5.2.3, the approach of creating an accommodative "environment in which respect for languages other than one's own would be encouraged" (LiEP, Lines 31-32). It is further asserted that, since this is the global and African norm, "the learning of more than one language should be general practice and principle" and, in fact, that "being multilingual should be a defining characteristic of being South African." Here multilingualism is simply defined as "the [individual] capacity to understand and communicate in more than one language" or "the significant prevalence in a society of more than one language". Yet again, an angle on respect and nation-building – here encouraging multilingualism as effective in countering "ethnic chauvinism or separatism" – is raised, this time as a secondary emphasis.

5) *5.2.5 A wide spectrum of opinions exists as to the locally viable approaches towards multilingual education, ranging from arguments in favour of the cognitive benefits and cost-effectiveness of teaching through one medium (home language) and learning additional language(s) as subjects, to those drawing on comparative international experience demonstrating that, under appropriate conditions, most learners benefit cognitively and emotionally from the type of structured bilingual education found in dual-medium (also known as two- way immersion) programmes.*

Whichever route is followed, the underlying principle is to maintain home language(s) while providing access to and the effective acquisition of additional language(s). Hence, the Department's position that an additive approach to bilingualism is to be seen as the normal orientation of our language-in-education policy. With regard to the delivery system, policy will progressively be guided by the results of comparative research, both locally and internationally.

This principle resonates with the current research-based consensus on multilingual education and second-language acquisition (Heugh, 2013; Skutnabb-Kangas & Heugh, 2012b). The agnosticism demonstrated by the allowance for wide-ranging arguments (LiEP, line 39) suggests that, probably for political reasons, the drafters of the document chose not to nail their colours to the mast by recommending a specific approach. There are strong indications that a follow-up policy implementation document would have contributed to a more decisive set of guidelines or directions for implementation, but this follow-up document never materialised (Heugh, 2013). This section of the preamble is the closest one might get to an explanation for the absence of a definition of multilingualism: the drafters were only willing to commit to "an additive approach to bilingualism" as a principle. This may be labelled a step in the empirically "right direction" (Barnes, 2004; Koch et al., 2009; Plüddemann, 2010), but it cannot on its own constitute a definition for multilingualism. There is an acknowledgement that, in any case, further assessment of existing (and future) research, conducted formally by the national education department, should guide the determination of the "delivery system" for the LiEP.

6) *5.2.6 The right to choose the LoLT is vested in the individual. This right has, however, to be exercised within the overall framework of the obligation on the education system to promote multilingualism.*

It is not explicitly stated, but this probably also arises from the Constitution, specifically the Bill of Rights: "Everyone has the right to receive education in the official language or languages of their choice in public educational institutions where that education is reasonably practicable…" (Chapter 2, Section 29 (2)).

The only limitation referred to in the policy document is "within the overall framework of the obligation on the education system to promote multilingualism". It is interesting to note that the right to choose the LoLT is specifically "vested in the individual", despite the fact that the general use of and identification with languages occurs within groups and communities. The Constitution itself recognises this in a section referring to cultural, religious and linguistic communities (Constitutional Assembly of South Africa, 2011, Chapter 2, Section 31).

Taken together, the points of the preamble (a) locate the need for the new LiEP within a similarly new Constitutional dispensation; (b) explicitly identify the LiEP as necessary for a nation-building and a new culture of mutual respect; (c) endorse additive bilingualism as a stepping stone to a society in which being multilingual is not only characteristic of, but also the norm among, South Africans.

There is a paragraph following the preamble, numbered 3 [5.3]. As mentioned earlier, this paragraph further emphasises that the accepted paradigm assumes a "more fluid relationship" between languages and culture than is typically recognised "in the Eurocentric model". It further makes the ideological assertion that "there is no contradiction in a multicultural society between a core of common cultural traits, beliefs, practices, etc., and particular sectional or communal cultures" (lines 52-54). This assertion is labelled ideological since in the text itself the paradigm is stated to accept the assertion *"a priori"*. Both this latter assertion and the "more fluid relationship" assumption are neither necessary for nor especially relevant to additive bilingualism (see, for example, Barnes (2004) for extensive discussion on characteristics of additive bilingualism).

4.5.2 Aims of the LiEP

There are six aims of the LiEP:

1) to promote full participation in society and the economy through equitable and meaningful access to education;
2) to pursue the language policy most supportive of general conceptual growth among learners, and hence to establish additive multilingualism as an approach to language in education;

3) to promote and develop all the official languages;
4) to support the teaching and learning of all other languages required by learners or used by communities in South Africa, including languages used for religious purposes, languages which are important for international trade and communication, and South African Sign Language, as well as Alternative and Augmentative Communication;
5) to counter disadvantages resulting from different kinds of mismatches between home languages and languages of learning and teaching;
6) to develop programmes for the redress of previously disadvantaged languages.

These are in line with the objectives laid out in the preamble, both fleshing out their application within the education realm and extending the applicability and expected outcomes beyond education to economic participation and prosperity. Whether these elaborations are appropriate, i.e. whether these are "the right aims", is assessed next. The aims are also assessed in terms of the extent to which they can be measured, since a policy is only relevant to the extent that it can be tracked and measured (OECD, 2010).

Aim 4 is most straightforward of all the aims, even if it does seem to over-reach by including languages beyond the official languages. It can be reasonably expected that a language policy, formulated appropriately and implemented properly, will achieve this objective over time. Given a functional definition of "support", this aim can also be measured quite simply and reliably.

Similarly, Aims 3 and 6 (with the latter as a specific instance of the former) are aims that a language policy should address in a country such as South Africa. However, these aims are higher-level aims, with a specifically developmental aspect. Their successful implementation requires the existence of a broader developmental plan (or a committed approach / strategy) around language in society, for example, an "NLP" as mentioned in the introductory segment. Programmes developed for the "redress of previously disadvantaged languages *[sic]*" are likely to fail if they are developed in isolation from a wider, yet targeted and purposeful societal engagement (van der Steen et al., 2015). Though programmes are relatively easy to assess, at least in principle, the expected outcomes are often not

sufficiently defined in order to permit reliable assessment of success or otherwise (McConnell, 2010).

Aim 5 is a transitional aim, one that will ideally cease to be relevant after a number of years (perhaps a generation) of effective application of the policy. This means that it is also a highly measurable aim, since mismatches may be identified and assessed in terms of their magnitude, severity and reach at the start, i.e. to benchmark, and at intervals post-implementation.

Aim 1 is very high-level aim, and effectively gives a picture of the sort of far-reaching impact that effective implementation of the LiEP is expected to achieve. It is the only place in the entire LiEP document in which the economy is explicitly mentioned, and thus it "carries a heavy burden" with respect to its import for the transformation of the nation. It will be difficult to assess progress towards this sort of aim for at least two reasons: first, "full participation in society and the economy" is a statement that is difficult to translate into meaningful and measurable terms; secondly, and perhaps more importantly, it will be difficult to determine the extent to which the LiEP and its resultant effects have contributed to any increase in full participation. In other words, attributing changes in full economic participation to the LiEP implementation will not be easy. For example, if in five years' time more people have bank accounts and are better integrated into the formal economy than they were previously, how could we determine the role that the LiEP played in that change, in an environment in which so many other things have changed, including technological advances, market dynamics, people's attitudes, and even other policies in financial services and other sectors?

Aim 2 restates the importance of additive bilingualism (here broadened, appropriately, to "additive multilingualism") and is essentially tautological – the aim of the policy is to implement the policy. Although one might argue that assessment of progress towards this is binary (i.e. "Has additive bi/multilingualism been established or not?"), it is possible to measure progress towards the ideal implementation of policy on a system-wide basis.

In summary, some of the aims are high-level and/or difficult to assess and/or point to the need for a broader language plan context within which they could be achieved. Two of the

aims, 4 and 5, in their present formulation provide a good opportunity for keeping the policy implementation measurable in a meaningful way.

4.5.3 Policy: Languages as Subjects

The section which follows the Aims is titled "Policy: Languages as Subjects". This section describes specifically how many languages learners will be required to take as subjects, and how grade-to-grade promotion (i.e. advancement) criteria will apply to language subjects.

For Grade 1 and 2, "at least one approved language" is to be taken. From Grade 3 onwards, the LoLT and at least one additional language are to be taken. This is additive bilingualism at play, albeit with foreshortened timelines in terms of exposure to the second language, relative to established best practice (Skutnabb-Kangas & Heugh, 2012b).

It is stated: "All language subjects shall receive equitable time and resource allocation". This is both idealistic and optimistic, as well as vague. Its vagueness is the most troubling aspect. At first reading, it might be apparent that this is meant at the school level. However, it is actually unclear at which level this statement is aimed. Is this equal time and resource allocation from the school, or from the relevant provincial department? Within the school, this implies that teachers of the language subjects will be on par with one another. This is too optimistic: it is unlikely to be the case, given that one language subject is likely to be/become the LoLT and will therefore be afforded more prominence and attention. Indeed, around the time of the introduction of Curriculum 2005 and the LiEP, debates about time allocations raged, with provinces adopting different approaches (D'Oliveira, 2003). In the absence of an implementation plan, this statement is, on the face of it, difficult to interpret and therefore not amenable to consistent implementation.

The promotion criteria are described next. It seems reasonable to infer that this is Section 4.4 referred to earlier, in line 11 of the LiEP document, despite the mismatched numbering. (Even if the numbering of the LiEP document were assumed to be correct, which it clearly is not, there is in fact no section that could be construed as Section 4.4 *from the numbering as it exists*.) The reason for this inference is that the section specifies details of a regulatory nature, stating which subjects are included for consideration in determining whether the learner has achieved sufficiently to go into the next Grade. The final point in this section

clarifies that these achievement levels may be reviewed by the provincial education departments, "[s]ubject to national norms and standards as determined by the Minister of Education".

Because the focus of this research report is language in education, the role that mathematics plays in promotion to the next grade will be passed over. Let it suffice to say that no subject, including mathematics, can be taught effectively if the learners do not have an adequate grasp of the language in which the teaching is mediated (Beukes, 2009). The language criteria specified in this section of the LiEP document have since been superseded by the CAPS (DBE, 2013b). The current criteria [language only] are as follows:

- Grade R to Grade 1: 50-59% ("Adequate Achievement") in the Home Language.
- Grade 1 to 2, Grade 2 to 3: 50-59% ("Adequate Achievement") in the Home Language, and 40-49% ("Moderate Achievement") in the First Additional Language.
- The criteria for passage from FP into Intermediate Phase (i.e. from Grade 3 to Grade 4) are not specified; however, it is assumed / reliably advised that the same criteria for the Grade 2 to 3 transition are used.
- Intermediate Phase progression (i.e. from Grade 4 to Grade 6): 50-59% ("Adequate Achievement") in the Home Language, and 40-49% ("Moderate Achievement") in the First Additional Language; furthermore, a learner may not be "retained" for more than one extra year within this phase, i.e. if the learner has repeated a year, he/she will not have to repeat another year, irrespective of results.
- Again, the criteria for passage from Intermediate Phase into Senior Phase (i.e. from Grade 6 to Grade 7) are not specified; however, it is assumed / reliably advised that the same criteria for the intra-Intermediate Phase transitions are used.
- Senior Phase progression (i.e. from Grade 7 to Grade 9): 50-59% ("Adequate Achievement") in the Home Language, and 40-49% ("Moderate Achievement") in the First Additional Language; furthermore, a learner may not be "retained" for more than one extra year within this phase, i.e. if the learner has repeated a year, he/she will not have to repeat another year, irrespective of results.
- Because passage from the Senior Phase into Grade 10 marks entry into the Further Education and Training Phase, there are a number of alternative entry requirements,

any one of which the learner must have achieved in order to progress to Grade 10. Most learners will progress on the basis of an official Grade 9 school report "which indicates that a learner has met the requirements for promotion to Grade 10" (DBE, 2013b). There is, however, no specific indication of what the language requirements will be for this. An alternative requirement is a National Qualifications Framework Level 1 certificate, which specifically requires two languages, but the level of competence or achievement in these languages is not specified.

- Progression from Grade 10 to 12: 40% in three subjects, one of which is an official language at Home Language level, and 30% in three more subjects. Again, as in all the prior phases, a learner may not be "retained" for more than one extra year within this phase, i.e. if the learner has repeated a year, he/she will not have to repeat another year, irrespective of results.

4.5.4 Policy: Language of Learning and Teaching

The next section, numbered 8, is titled: "Policy: Language of Learning and Teaching". This section comprises exactly one line, a single sentence:

> The language(s) of learning and teaching in a public school must be (an) official language(s).

There can be no mistaking that this section is only a single line long. The text that immediately follows, starting the next section is titled "NORMS AND STANDARDS REGARDING LANGUAGE POLICY PUBLISHED IN TERMS OF SECTION 6(1) OF THE SOUTH AFRICAN SCHOOLS ACT, 1996". This is specifically mentioned at the beginning of the LiEP document as the second policy in the document. The abrupt, short nature of this section on the LoLT is worth unpacking, but this is done within the context of the analysis of the Norms and Standards policy, below.

4.5.5 Constraints of Policy Ideology

The lengthy preamble presents within it the kernel of several constraints to the effective implementation of the LiEP. Some of these are ideological in nature, and have been briefly introduced in the description section above.

The constitutionally-based sentiment promoting the valuing and respecting of all languages is laudable from a humanistic perspective. However, it is lacking in substance by not giving any further content or context for what constitutes this respect. Specifically, the absence of any sort of definition for the term 'multilingualism' creates an interpretive challenge for a reader of the content that follows. The phrase "development of the official languages" is at least directional, although again, in an educational context, this phrase is open to interpretation in various ways, not all of which would necessarily be meant by the writers of the policy. A few examples: (1) the mere propagation, i.e. the spreading of the teaching of a language in schools, could be justifiably considered development in South Africa; (2) the mere (increasing) use of a language as a LoLT beyond Grade 3 could be considered development of the language in South Africa, and/because it would presumably necessitate the production [development] of teachers and teaching material in the language; and (3) the supported introduction of, for example, Setswana, for formal, regular use in the legal profession alongside English and Afrikaans could be considered development of an official language. The first two examples have educational relevance, and yet involve quite different sets of assumptions, objectives and methods. The third example is certainly developmental, but has little to do with primary and secondary school education.

Section 5.2.2 acknowledges the painful, difficult past that has resulted from previous language policy regimes in education. This immediately suggests a clear constraint that may be peculiar to South Africa, a country dealing with a notably traumatic history: there are sensitivities that may preclude thorough, dispassionate and well-reasoned arguments and the undesirable or uncomfortable conclusions to which they may lead. Associations between apartheid and the models of MTE are very difficult to "undo", even if they are just associations and not logical connections, and even in the minds of experts and officials, who might be expected to be more discerning than members of the general populace. In the words of Interviewee D:

> Because of the poisoned chalice of MTE in Bantu Education, in the years between 1955 and 1975 or so, because of that horrendous experience of MTE as an index of apartheid oppression and dispossession in fact, the concept of the MTE has never been palatable to people with the historical memory. And these historical memories get inter-generationally

> transmitted through families, schools, through whole peoples, as it were. So, you have a perpetuation of thinking that is inherited and largely unquestioned.

While it is laudable to aspire to building a non-racial nation, point 5.2.3 falls significantly short of where Government policy is well-matured and fit for purpose in other areas. The policy of Black Economic Empowerment (BEE) has been in place in South African economy for a number of years, and is aimed at providing means for accelerated redress for the black majority of South Africans who have been systematically disadvantaged in South Africa by apartheid (Acemoglu, Gelb, & Robinson, 2007; Kleynhans & Kruger, 2014; Tshetu, 2014). This objective of BEE occurs in a nation whose government is still formally committed to non-racialism, and this is no contradiction. A realistic and fair assessment of South African society has to include acknowledgement that most black South Africans require significant disproportionate support to have a chance of competing "on a level playing field" (Acemoglu et al., 2007; Black Economic Empowerment Commission, 2001). Except for the last of the six Aims (Point 5.5.6, LiEP line 70), the LiEP does not acknowledge this need for disproportionate support. It also does not highlight the important ways in which the LiEP could directly and indirectly support official affirmative action policies. An example is the establishment of small and medium enterprises (founded, owned and operated by black people) specialising in various aspects of a production ecosystem around language in education, such as content production, terminology development and teacher training.

4.5.6 Constraints of Policy Management

Section 5.2.5 points to a general deficiency in the LiEP: the deferral of important policy choices to a later, unspecified date. This section states that there is "a wide spectrum of opinions" (LiEP, line 38) regarding which approaches are best suited to local conditions. While definitively supporting "an additive approach to bilingualism… as the normal orientation" (LiEP, line 45) of the LiEP, no stronger policy position is adopted. Indeed, it has been argued that by insisting on just one additional language, and not two, the former Afrikaans-English bilingual axis of pre-1994 South Africa can continue unaltered (D'Oliveira, 2003). However, the DBE has relatively recently begun to address this shortcoming, as it introduces the Incremental Introduction of African Languages (IIAL) programme (DBE, 2013a).

The crucial matter of the choice of "delivery system" is deftly avoided: "policy will progressively be guided by the results of comparative research, both locally and internationally" (LiEP, lines 46-47). The mechanisms for this specific policy development process are apparently assumed. Given that this process is likely to differ significantly from that which has produced the LiEP itself, this assumption does not seem justified. Comparative research does not feature as a major input to the LiEP, based on the Preamble, which describes the process of the development of the LiEP. Without a defined mechanism to direct policy development as it is "progressively… guided by the results of comparative research", and without any suggestion of timelines to be followed, it will be difficult for a policy practitioner to advance this policy towards completion and implementation.

4.6 Norms and Standards regarding Language Policy published in terms of Section 6(1) of the South African Schools Act, 1996

4.6.1 Description

There are five sections to the Norms and Standards policy document: an Introduction (comprising Aim and Definitions), and then four sections that, in turn, provide some detail on individual rights, rights and duties of the school, rights and duties of the provincial education departments (PEDs), and on further steps that should be taken in the event of a disagreement with a decision taken by the head of the PED.

The Introduction section: the aim of the document clearly recognises diversity as "a valuable asset", and asserts that the aim of the policy is "the promotion, fulfilment and development of the state's overarching language goals in school education in compliance with the Constitution". These "overarching language goals" are spelt out as:

1) **protection, promotion, fulfilment and extension of the individual's language rights and means of communication in education:** An "individual's language rights" are those rights enshrined within the South African Constitution, particularly in Sections 29 (on *Education*), 30 (on *Language and culture*) and 31 (on *Cultural, religious and linguistic communities*) (Constitutional Assembly of South Africa, 2011). Section 29 (2) states that "Everyone as the right to receive education in the official language or

languages of their choice in public educational institutions where that education is reasonably practicable." (Constitutional Assembly of South Africa, 2011, p. 12)

2) **the facilitation of national and international communication through promotion of bi- or multilingualism through cost-efficient and effective mechanisms**: the Constitution makes no explicit reference to bilingualism or multilingualism, nor does it refer to communication as such or its facilitation at any level. However, the relatively extensive references in the section on language (Section 6), and in particular, the injunctions in Sections 6 (2), to "take practical and positive measures" to elevate the status and use of indigenous languages, and 6 (3), to direct that national and provincial governments must use at least two languages, indicate that bi- and multilingualism and the facilitation of communication are Constitutional concerns.

3) **to redress the neglect of the historically disadvantaged languages in school education:** Sections 6 and 29 of the Constitution respectively promote the use of historically-neglected indigenous languages, and recognise the right to education in all official languages, particularly taking into account "the need to redress the results of past racially discriminatory laws and practices".

The definitions part of the document simply clarifies that words in this policy that occur as defined words in the South African Schools Act (SASA) No. 84 of 1996 will have the same meaning, and it defines a few words, specifically Act (SASA), Constitution, school district and language (any one of SA's eleven official languages plus SA Sign Language, "as well as Augmentative and Alternative Communication" (AAC). The latter concept, AAC, refers to communication methods and devices employed by people who need them because of some condition or impairment that affects them ('Augmentative and Alternative Communication (AAC)', n.d.; Balandin & Morgan, 2001)).

The section on Protection of Individual Rights contains four points.

1) the parent exercises the right to choose on behalf of the learner, unless the learner is a major
2) when applying to a particular school, the learner must choose the desired LoLT.

3) Where the learner's choice of LoLT and the school's LoLT coincide, the school must admit the learner, as long as there is space in the school
4) If no school in the learner's district offers the desired LoLT, then the learner should request that the PED make provision for that language, "and section 5.3.2 must apply". There is no section 5.3.2 in the LiEP text. So, it is unclear which section is being referred to, as the numbering throughout the document is inconsistent, and the context does not make it obvious. Additionally, the school must communicate with all schools in the district that such a request has been made.

The section on the Rights and Duties of the Schools gives two points of guidance on the decision-making conduct pertaining to the schools. The first point has to do with how the SGB itself "must stipulate how the school will promote multilingualism". Here several options are mentioned as ways of promoting multilingualism. The second point outlines how the head of the PED must specify how, once the thresholds have been met (40 for Grades 1 to 6; 35 for Grades 7 to 12), the learners who have requested an alternative LoLT will be accommodated in a particular school. The head of the PED is obliged to take into account five matters:

- The duty of the State and the Constitutional rights of the learners;
- The need to achieve equity;
- The need to redress past unjust and racially discriminatory laws;
- Practicability; and
- The advice of the SGBs and principals of the relevant schools.

Four of these five matters reflect directly back to points raised within Section 29 of the Constitution. The exception is the last point.

The section on the Rights and Duties of the PEDs contains four points.

1) The PED must keep a register of all the requests by learners for a LoLT that the schools cannot accommodate;
2) For a new school, the SGB determines the language policy in consultation with the relevant PED;

3) The “reasonably practicable” thresholds for providing a LoLT are repeated (40 in a grade for Grades 1 to 6; 35 in a grade for Grades 7 to 12); and
4) The PED should find creative and constructive ways to share scarce language teaching resources.

The final section of the policy outlines the available recourse for any learners or SGBs that disagree with the decision(s) of the head of the PED or, following escalation, of the Member of the [Mayor’s] Executive Committee (MEC). In the first phase, a learner or SGB may appeal against the head of the PED’s decision to the MEC within 60 days. Following the MEC’s decision, the learner or SGB may approach PanSALB for legal advice, and may also take the matter further for adjudication at the Arbitration Foundation of South Africa, where the matter must be “finally resolved”.

4.6.2 Policy Constraints

The Norms and Standards policy is a partner policy document for the LiEP. The LiEP is set out in terms of the National Education Policy Act, while the Norms and Standards policy is set out in terms of the South African Schools Act No. 84 of 1996. The Norms and Standards policy is clear in its three main aims: protecting and extending language rights and means of communication in education; facilitating national and international communication that is cost-efficient and effective; and redressing the historical neglect of particular languages in education. What is intriguing is that just a cursory glance at the headings of the sections that follow indicates that the first aim – protecting and extending language rights – is explicitly and directly addressed (see Section 7.3: The Protection of Individual Rights (LiEP line 107); Section 7.5: The Rights and Duties of the School (LiEP line 119); Section 7.7 The Rights and Duties of the PEDs (LiEP line 136)). Such a cursory glance cannot lead one to conclude that either of the latter two aims is adequately addressed. Indeed, a closer examination of these sections indicates that, at best, there is a partial acknowledgement of these aims within the policy text, and an indirect attempt to address each one.

An example of this indirectness relating to facilitation of national and international communication through cost-efficient and effective promotion of bi-/multilingualism: within the section on the Protection of Individual Rights (section 7.3), where a school does not

provide a learner's preferred LoLT, the learner may request the PED to provide it (LiEP, lines 115-117). This is within a rights context, rather than with the objective to facilitate communication via multilingualism. An example of the indirectness relating to the redress of historical neglect of languages: where a request for provision of a LoLT does not arise from 35 or more learners (Grades 7 – 12) or 40 or more learners (Grades 1 – 6), then the head of the PED should determine how to fulfil the request, "taking into account… the need to redress the results of past racially discriminatory laws and practices" (LiEP, lines 130 & 133). The over-emphasis of the rights-based aim of the Norms & Standards document occurs at the expense of the communication-facilitation aim and the historical-redress aim. The fact that there is some overlap between them (e.g. historical redress is a rights issue to a degree) may have obscured this imbalance to the drafters, and can soften the intensity of the imbalance.

4.6.3 Constraints of Policy Ideology

A fundamental critique of the Norms and Standards policy is that it fails at the identification of appropriate norms and standards. It describes a "norm" process for the learner to choose their desired LoLT. But it does not specify what the norm should be in terms of the expected outcome of this process. There is a standard threshold of 40 (Grades 1 to 6) or 35 (Grades 7 to 12) in terms of the minimum requirement to justify efforts at provision of an alternative LoLT. But there is no standard provided for an acceptable level of multilingualism, or an acceptable level of provision of time and resources that effectively deal with the redress of historically neglected languages. The standard threshold numbers appear unnecessarily arbitrary. To illustrate, these threshold numbers would surely have very different meanings for a school with 80 learners per grade, compared to a school with 250 learners per grade. A better approach might be one that gives thresholds as a percentage of the grade cohort; still better might be an approach that provides a pedagogical justification for a minimum number of learners to justify the introduction of an alternative LoLT.

The section on the protection of individual rights directly aligns with the objective to protect, promote, fulfil and extend the language rights and communication means of the learner. However, it falls short in at least two major ways. The first is a policy ideological

matter: that there is a significant assumption that is being made about the true nature of the LoLT choice that the parent must make for their child. The choice is not a choice between equal options, and invariably in South Africa this is a choice that pits a black African language against English (or, much less frequently, Afrikaans) in South Africa's historically established two-tier language ecology (Wright, 2012).

Both the historic and present landscape of the South African economy and society militate against the selection of the African language, even by those people whose interests might best be served by such a selection (De Klerk, 2002b; Heugh, 2000; Wright, 2012). Parents will more often than not choose English for economic reasons associated with helping to ensure progress and prospects for their children, even if they have a strong desire for their children to maintain or strengthen their mother-tongue competence (De Klerk, 2002a). The failure to acknowledge the deficiency inherent in this choice constitutes a major constraint with respect to promoting and extending the language rights and communication means of the learner, and achieving the multilingual aims of the LiEP. Even in the light of knowledge about pedagogical, cognitive, intellectual and social benefits of MTE, [the parents of] a young learner may still opt for English, because they can see the present superior infrastructure supporting that language, and the future superior opportunities offered by proficiency in that language. The [parents of the] young learner may choose English for these reasons even in vain hope, i.e. even if the superior infrastructure of English is not actually available to them, and therefore the superior opportunities are not accessible to them under their present circumstances.

4.6.4 Constraints of Policy Management

There is a second way in which the section on the protection of individual rights falls short. This way is that, given the unequal playing field described in principle terms by Wright (2012) and in practical research by De Klerk (2002a, 2002b), there is in fact no mandated effort to ensure that the choice of LoLT for the parents of minor learners gradually becomes a real and realistic choice. The Norms and Standards policy document is arguably the correct place to make a definitive policy ruling about how investment in resources and infrastructure is to be made in order to raise the profile, capacity and usability of black African languages as LoLTs.

The SGB is to stipulate how it will promote multilingualism. This, together with the alternatives suggested, implies a significant level of discretion in the hands of the SGB, although the sections do make clear that cooperation with the PED is assumed. This level of discretion is intended by the SASA (RSA, 1996). However, the wide discretion effectively means a low threshold is set for technical compliance to the requirement to "promote multilingualism". This constraint is compounded by the absence in the SA Schools Act and in the LiEP of even a conceptually effective mechanism to ensure the effective implementation of multilingual strategies in consultation with the PED.

As stated before, the requirement on the Provincial Education Department to make provision for demands for a LoLT from groups of 40 (Grades 1 to 6) or 35 (Grades 7 to 12) and larger is unnecessarily arbitrary, and an inappropriate blanket requirement. It discriminates against smaller groups. The PED is also required to "find ways and means of sharing scarce human resources" (LiEP, line 145). This could be argued to be an acknowledgement of the need to plan for these smaller groups. The Norms and Standards policy crucially fails to specify – or even, at the very least, to mandate the PEDs to specify – what or how many LoLTs should in fact be available on a per-district level. The conciseness of a one-line statement about the LoLT, such as made in the LiEP, is efficacious, and therefore acceptable, surely *only* in a policy environment in which there is both strong consensus on the policy objectives and a broadly-agreed pathway to the achievement of said objectives. The realm of education in South Africa is not such an environment. In this policy environment, one that has been characterised by what some have termed "gridlock" (Plüddemann, 2015, p. 196), the failure to specify explicit standards to uphold is a significant contributor to setting up and maintaining such a lock on progress.

4.7 Further Constraints

The official confirmed that the LiEP presented to him by the researcher is the current and only official version of the LiEP. He conceded that it is not a document to which he refers on a regular basis, and acknowledged that it has some shortcomings. He also freely acknowledged that there is a mismatch between the policy on paper and the policy in application. He further admitted that curriculum development had to some extent overtaken the LiEP, with specific reference to the changes introduced to language learning

practices as a result of the implementation of NCS-CAPS in schools. This is consistent with the author's findings from documentary analysis of the DBE's policy document (DBE, 2013b) in an earlier section of this chapter (Policy: Languages as Subjects). The specific differences between NCS-CAPS and the LiEP are presented in Table 1 below. Again, all these differences, as stated by the official, are consistent with those obtained from the DBE's policy document.

The official also referred to Rules and Regulations, an appendix in which regulatory changes are gazetted and recorded for reference. The use of Regulations / Rules and Regulations sections allows relatively small changes to be promulgated without requiring the more involved processes that are associated with changing a policy or a law. At the time of the introduction of the IIAL programme, a revision of the LiEP was considered; however, it was believed that it would be appropriate to cover the changes within the Rules & Regulations. Unfortunately, within the time of writing this chapter and finalising this research report, it has not been possible to gain access to the Rules and Regulations document, which is unpublished, despite several attempts to do so via the DBE official.

Table 1. Differences between NCS-CAPS and the LiEP

Section*	**LiEP**	**NCS-CAPS**
5.7.1	"All learners shall offer at least one approved language as a subject in Grade 1 and Grade 2."	Two languages now compulsory.
5.7.2	"From Grade 3 (Std 1) onwards, all learners shall offer their language of learning and teaching and at least one additional approved language as subjects."	One language as LoLT; if LoLT is English, then the Home Language (HL) as subject at HL level, or another language at First Additional Language (FAL) level; if LoLT is not English, then English at FAL level.
5.7.5.1	In Grade 1 to Grade 4 (Std 2) promotion is based on	Promotion now based on two languages (50% threshold for HL,

Section*	LiEP	NCS-CAPS
	performance in one language and Mathematics.	40% for FAL) and mathematics (40%)[1].
5.7.5.2.	From Grade 5 (Std 3) onwards, one language must be passed.	Promotion now based on two languages (50% threshold for HL, 40% for FAL).**
5.7.5.3.	From Grade 10 to Grade 12 two languages must be passed, one on first language level, and the other on at least second language level. At least one of these languages must be an official language.	Only one language must be passed.
7.6.2	Where there are less than 40 requests in Grades 1 to 6, or less than 35 requests in Grades 7 to 12 for instruction in a language in a given grade not already offered by a school in a particular school district, the head of the provincial department of education will determine how the needs of those learners will be met, taking into account	40 is threshold at primary school level (i.e. up to Grade 7). 35 is threshold at secondary school level (i.e. Grade 8 up to Grade 12).

**per new numbering; **could be reversed*

4.8 Conclusion

In this chapter, the historical context of the development of the LiEP in the mid-1990s has been reviewed, and a detailed description and analysis of the LiEP document, focusing on the constraints that arise from it, has been presented.

The LiEP document has three parts: an introductory section, the LiEP in Terms of Section 3(4)(M) of the National Education Policy Act 27 of 1996, and the Norms and Standards regarding Language Policy published in terms of Section 6(1) of the SASA, 1996. The explicit intent of the policy-makers was for the policies to be read together. They also acknowledged that significant amendments to the policy were anticipated in the light of

curriculum development work that was ongoing concurrently. To the best of this researcher's knowledge, no amendments have been made in these intervening two decades.

Several constraints have been identified across the document. The introductory section brings to light the constraint of the consultation-based approach to policy development in South Africa. This ideological constraint leads to the policy management constraint that has seen the LiEP being overtaken and side-lined by curriculum development. Curriculum policy planners have never been under any identifiable pressure to recognise and include the LiEP in their work.

Ideology-based constraints within the LiEP include the lack of a functional definition of multilingualism which can direct policy implementation, and the absence of a recognition of the need for disproportionate support of black learners who speak African languages. The emotive nature of much of the argumentation against the use of African languages, based on their [pedagogically correct but politically oppressive] use during the apartheid era, is another ideological constraint. A policy management constraint within the LiEP is the deferral of critical policy choices, such as the delivery system for additive bilingualism, to the future. Further research needed to guide these choices is itself also deferred and undefined.

The Norms and Standards policy document fundamentally fails at adequately describing norms and standards, specifically those relating to the expected outcome of a choice-of-LoLT process, and to acceptable levels of multilingualism and provision of time and resources for previously marginalised languages. If the destination is undefined, achieving verifiable progress towards it is impossible.

A further crucial ideological constraint is the implicit assumption in the policy that the LoLT choice made by a learner or parent is an even-handed one. It is not: even under the most exceptionally favourable circumstances, which exist virtually nowhere in SA, black parents might still prefer English (or Afrikaans) over their own language because of the deep economic and social privilege that English (or Afrikaans) displays and conveys. The LiEP itself should address this by specifying the need for and demanding progressive changes to

the fabric of society (starting in education) to make the choice of isiXhosa or Sepedi or Tshivenda as a LoLT a realistic and viable choice. That the LiEP does not do this is a further policy management constraint. That the LiEP makes only passing reference to the economy in general terms (no mention is made of the need for deep, wide-ranging and specific changes to make the South African economy fairer and more accessible to Black people) is not only indicative of a narrow perspective on the purpose and power of language choices in education, but also an exacerbation of this policy management constraint.

Naturally the Language-in-Education Policy is a product of its time and it would be unfair to criticise it on the basis of insights which have become available only since its publication 20 years ago (Plüddemann, 2015). However, it is worth relating some of these insights at this point.

The theoretical underpinnings of the LiEP are to be understood in the context of three ideological orientations that vied for supremacy during the transition of South Africa from apartheid to a fully democratic dispensation. These three orientations are segregationist (i.e. conceiving of languages as separate, immiscible entities, reflecting apartheid-type thinking), assimilationist (i.e. typically rejecting apartheid, but easily slotting into an Anglocentric worldview that assumes English as the end goal), and integrationist (i.e. reflecting a functional multilingual approach). The resulting compromise reflected in the Constitution and eventually in the LiEP as well was in some respects a continuation of the apartheid separatist thinking, that viewed all official languages as distinct, separate entities, but also pragmatically assumed a need for wide adoption of English. Thus an environment was created in which multiple parallel monolingualisms could theoretically flourish (Heugh, 2013). This was, however, significantly undermined by the development of the education curriculum along clearly Anglocentric assimilationist lines, shown by the switch from home language to English that was assumed for all learners (except Afrikaans speakers) at Grade 4 (Heugh, 2013; Plüddemann, 2015).

Further reflecting this amalgam of separatist and assimilationist thinking, the LiEP fails to recognise the value that bilingualism and multilingualism as resources bring to children. While the LiEP concludes with a single line on the policy with respect to the LoLT – that it shall be "(an) official language(s)" – that ostensibly allows for the use of multiple LoLTs, the

language of the LiEP as a whole reflects an assumption that bilingualism is merely double monolingualism, rather than a capacity that allows for new ways of thinking and learning in a multilingual context (Janks & Makalela, 2013; Plüddemann, 2015).

Finally, while South Africa is renowned for its multilingual diversity, even that diversity manifests very differently in different parts of the country. Some parts of the country are relatively monolingual or "only" bilingual, e.g. a majority of the learners in the E. Cape will be isiXhosa speakers. Arguably the most plurilingual part of the country is Gauteng, which is both the smallest and most populous province in the country. The clear-cut, "clean" ideological assumptions of the LiEP in terms of the LoLT choice – and particularly in terms of the threshold numbers for justifying additional LoLTs – do not make sense in a province like Gauteng in which many children may themselves be comfortable with multiple "mother tongues" as they enter the school system.

Chapter 5 – The Policy in Public

5.1 Introduction

This chapter presents the results of interviews and documentary analysis of a key document from the DBE. The interviews were conducted with several experts and a government official in the South African education sector, who have particular insight and extensive experience regarding language in education. The semi-structured interviews revolved around language-in-education practices and practical impact of the LiEP, with some discussion about ideology and management, as these aspects of policy naturally impact practice. The documentary analysis examines a report commissioned by the DBE to determine the high-level statistics regarding the LoLT in South African public schools. This effectively is a self-assessment by the DBE of the effectiveness its policy management processes to implement the LiEP, and thus analysis of such a document may offer important insights into how the DBE views the policy, understands the problems and decides on and implements solutions. The documentary analysis of the DBE document is presented first as it may also serve as useful backdrop to the findings and insights generated from the interviews.

5.2 Documentary Analysis: DBE Quantitative Overview (2010)

The DBE has produced a document titled *The Status of the Language of Learning and Teaching (LoLT) in South African Public Schools: A Quantitative Overview*. This document presents the trends in learners' home languages, the Language of Learning and Teaching used by schools, and learner enrolments in First, Second and Third Additional Languages, by phase, from 1997/98 to 2007 (DBE, 2010). Unless otherwise indicated, this document is the source of the data presented in this section.

The purpose of this document is to analyse the trends over this period, with the intent of aiding the assessment of the effectiveness of policy implementation (p. 9).

5.2.1 Results and Discussion of DBE Quantitative Overview (2010)

Almost two-thirds (65.3%) of learners in South Africa in 2007 were taught using English as the LoLT. A further 11.9% were taught in Afrikaans, meaning that a total of 22.8% of learners were taught in one of the nine black African languages. More than half of these learners were accounted for by isiZulu and isiXhosa. The proportion of learners taught in Sepedi, Setswana, Sesotho, Xitsonga, Tshivenda, siSwati and isiNdebele (combined) is therefore a little over 10%.

These LoLT results stand in stark contrast to the data on the learners' home languages. Maintaining the descriptive sequence established above, only 7% of learners had English as their home language, while almost one in ten (9.8%) had Afrikaans as their home language. Close to half (45.5%) of learners count isiZulu (25.1%) or isiXhosa (20.4%) as their home language. The proportion of all learners with Sepedi, Setswana, Sesotho, Xitsonga, Tshivenda, siSwati and isiNdebele as home languages is therefore a little over one-third.

The implications of this are fairly clear: of those learners who are taught in English and Afrikaans, *at least* 60.4% (i.e. [65.3 + 11.9] – [7.0 + 9.8]) are NOT being taught in their home language. The qualifier "*at least*" must be included, because (a) it is possible that some learners whose home language is English or Afrikaans are being taught in other languages, and (b) there is reason to believe the use of English and Afrikaans as LoLT may be under-reported. However, the researcher agrees with the report authors, who assume for analytical purposes that all learners with English or Afrikaans as Home Language learn in those respective languages. This is a reasonable assumption in South Africa, given the wide availability of English and the strong correlations between (English and Afrikaans) language and wealth (Spaull, 2013). The under-reporting of English and Afrikaans may be effectively disregarded, because it is difficult to quantify and because even if it were known, it would simply reinforce conclusions demonstrating the dominance of these two languages.

It is also important to note that the above data are aggregated for all 12 Grades across the school system. Thus, the high percentage of learners that are taught in English or Afrikaans (neither of which is a home language for most of them) does not come as a surprise, given the default policy to teach in English (or Afrikaans) from Grade 4 onwards in the large

majority of South African schools. It is also worthwhile examining the results in more detail, i.e. to review them by Grade, as the DBE report makes possible.

The implementation of the policy goal, articulated by the LiEP, to encourage the use of a learner's home language in the FP (i.e. Grade R to Grade 3) is specifically reviewed in the report. The corresponding increase in the number of learners learning in their home languages during the FP (a steady increase from 55% in 1998 to 80% in 2007) is confirmation of the progressive, though incomplete, achievement of this goal. Therefore, by 2007, one-fifth of children in SA schools were still not being taught in their home languages. Virtually all of these children have languages other than English and Afrikaans as home languages. Extrapolation of the 1998–2007 trend suggests that by 2014, 100% of learners would be taught through FP in their Home Language. Given the absence of an available update to this report, it is not possible to say what percentage of learners in FP were taught in their home language by 2014 (or 2017). What is known is that the supply of FP teachers estimated to be available during the period 2013 – 2020 will be significantly lower than the projected demand. When the analysis is done by home language of the FP teachers, the shortfall is most pronounced for the black African languages, in particular, isiZulu and isiXhosa (Green et al., 2014).

The annual undersupply of teachers is estimated at about 3,350 for 2012, of which fewer than 120 are English and Afrikaans teachers. In fact, in the absence of any major interventions, Green et al. (2014) estimate that the shortfall by 2020 will be between 20,000 and 45,000 FP teachers, the upper limit of which would represent over 25% of the active workforce (i.e. approximately one missing teacher for every four existing teachers). These data appear to conflict directly with the extrapolation of the trend towards full home-language FP teaching. Specifically, the data from Green et al. (2014) indicate that at the very least there is a lack of teacher capacity to deliver sufficient teaching at FP level. This is not captured by the DBE Quantitative Overview, and indeed could not be captured by it, as the overview is based on survey responses by schools, which (as far as it is possible to discern) give no indication of the effectiveness of the execution of home-language FP teaching. In this way, it is possible to reconcile the apparent progress recorded towards comprehensive home-language FP teaching, as indicated by the Quantitative Overview, with the dearth of teachers at FP that has been demonstrated by Green et al. (2014).

For Grade 1, the report indicates that the percentage of children being instructed in their own home languages has been on the increase. In 1998 almost 37% of Grade 1 learners were taught in English (31.7%) or Afrikaans (5.1%), and by 2007 this figure had dropped more than 5.5 percentage points to just over 31%. Two points are noteworthy in regard to this drop. First, that despite the overall decrease in the combined proportion of English and Afrikaans as LoLT, Afrikaans in this period *gained* ground, its rise to 9.5% accounting for about half of the losses of English (almost ten percentage points down to 21.8%). In other words, the increase in the percentage of children learning in Afrikaans was almost as much as the percentage increase in children learning in the other nine official languages combined. Second, virtually all of the increase in African languages as LoLT seems to have arisen in schools teaching in isiXhosa and isiZulu (siSwati is ignored because no data were collected for 1998). This has to be taken with some scepticism, as a significantly more mixed picture emerges if 1999 is used as a starting point (although isiXhosa and isiZulu still dominate). The DBE report authors' caveat about comparing results across years needs to be borne in mind.

5.2.2 Official Response to DBE Study on LoLTs

The DBE official interviewee (see Section 5.4 below) seemed unfamiliar with this 2010 document, which may be understandable given that he was employed in the department after that date. Despite his earlier concession that "wherever they're trying vernac as LoLT, the results are very positive," he insisted that it could not be the case that there were any schools offering languages other than English and Afrikaans as LoLT. The only exception to this is the isiXhosa-LoLT schools in Eastern Cape, the overwhelming majority of which are part of the Cofimvaba pilot programme. Therefore, for this official, it was simply not believable that approximately 6-8% of learners, as reported in this study, were learning in African languages from Grade 4 all the way to Grade 12, as of 2007. While he was not aware of any updates to this document, he was adamant that these figures were certainly not representative of the current situation, even if they may have been accurate a decade ago.

5.2.3 Conclusion on DBE Quantitative Overview (2010)

Unfortunately, the data presented in this 2010 document are now a decade old, running up to 2007. To this researcher's knowledge, there has been no update of this report, nor any report, official or otherwise, reliably covering similar ground. The government official whom the researcher interviewed expressed no knowledge of any update to this report either. There is little doubt that the situation in 2017/18 will be significantly different from what is described in this document, given the rates of change that the document itself identifies in the decade leading up to 2007. An updated quantitative overview, following and improving on the pattern of this 2010 document, would be a particularly useful supporting document to a LiEP revision process, as well as to researchers, activists and other role-players in education.

Furthermore, the report itself notes that there are some inconsistencies in the data that may compromise the validity of comparisons across the period presented in the report. Nevertheless, given that the authors and the department are comfortable to present the data and draw trend-based conclusions, it stands to reason that others may do the same, as long as they remain aware of the caveats.

The report itself acknowledges that, despite its usefulness, LoLT is a somewhat simplistic concept, as teaching and learning do not always occur in the same single language in such a highly multilingual setting as South Africa. This observation is confirmed by several other authors and researchers (Dalvit et al., 2009; Matentjie, 2010; Plüddemann, 2010).

5.3 Key Emergent Themes

Through an iterative coding process, several key themes emerged during the interviews. These themes are either themselves identifiable as constraints in terms of ideology, management or practice, or they reflect one or more constraints affecting LiEP implementation.

5.4 Official Interview Results

The researcher interviewed an official from the national Department of Basic Education (here and elsewhere referred to as "DBE official"). He is the Language Coordinator in the DBE, within the Curriculum Development and Management division. This division includes subject specialists. The Language Coordinator deals mainly with language for academic purposes, while a colleague handles languages as subjects.

The interview with the DBE official followed a similar pattern to those with the other interviewees, with some variations that resulted in its extension: it ran for almost two hours. The discussion covered three areas, all of which are discussed at length in sections of this research report, namely the LiEP on paper, LiEP in practice, and the 2007 DBE-commissioned study on African languages as LoLTs. It is appropriate to juxtapose the "official" responses in these areas with the findings derived from this research. This is therefore done for two of these areas – policy in practice and the DBE study – in this chapter, while the LiEP on paper discussion is in Chapter 4.

Similar key themes to those identified in the interviews with the various experts emerged in the discussion with the official.

5.5 Constraints of Policy Ideology

Ideology-based constraints relate to the way in which the ideology (or apparent lack of ideology) about language has an impact on the way in which policy is implemented or not implemented. There are two main practical ideological constraints: the lack of ideological unity resulting in the non-completion of outstanding parts of the LiEP, and the disconnect between LiEP issues and all other areas of education, such as curriculum, evaluation, and so on.

5.5.1 Constraint 1: Ideologically-driven to Incompletion

The primary intent of the LiEP was identified by most interviewees as "linguistic redress" (Interviewee A), namely the concerted attempt to correct the linguistic inequities that were perpetrated in the past. One expert, Interviewee C, described the LiEP as the work of

"setting up a rhetorical basis for actual change practice in classrooms." These were the most positive descriptions of the LiEP. There were several critical and pessimistic views of the LiEP expressed by the experts. While Interviewee B construed the LiEP as a "promise", for him this promise has not been upheld thus far. Interviewee G was more forthright, calling the LiEP a "con". In her view, there is a serious and important failure of the LiEP to make the link clearly between additive multilingualism and quality education. In her professional work in the Eastern Cape and Western Cape provinces, Interviewee E expressed significant frustration at the absence of guidelines for education practitioners: "We tried to implement the LiEP except that we realised quite soon that it was not about implementation, it was about development, because there was nothing to implement – there are no guidelines whatsoever".

5.5.2 Constraint 2: LiEP Disconnected

Furthermore, Interviewee E asserted that the ANAs and the CAPS not only fail to build on the LiEP, but that they contradict it. Specifically, the practice by which the ANAs are conducted in English or Afrikaans only, and the omission of any discussion about the choice of LoLT in the CAPS, are points of contradiction.

So, the intent of the LiEP has been fairly clear, even if its fulfilment may be incomplete, at best. In contrast, however, the LiEP itself and the way it is treated by officials suggest that the underlying assumptions about and attitudes towards language in education are varied, controversial and unstable, even within official circles. Interviewee E indicated that "at national level there is much ambiguity". According to her, departmental officials recognise some of the deficiencies in the policy, but do not want to be seen "to fiddle" with it. Interviewee D asserted that "the DBE cannot speak with one voice" on this matter. Interviewee B criticised the LiEP as a "static policy", in other words, one that assumes a static language and learning environment. The LiEP does not make room for evolving languages and language use patterns, for example "translanguaging" or the use of multiple LoLTs.

In relation to this, Interviewee E's criticism was that the LiEP effectively encourages "parallel monolingualisms", rather than functional, dynamic multilingualism. This purist, even

separatist, attitude was referenced by several other interviewees (A, D, F and G). According to Interviewee D, the attitude of curriculum planners, such as those who produced CAPS, is one that does not view languages as a resource upon which they may draw. Even when government officials and others have been enticed into recognising the value of promoting multiple languages in the multilingual South African context, they still sometimes betray unsupportive and contrary attitudes. For example, a dean at a prominent university was heard by one of the interviewees to say, at an education symposium, "Let this Language-in-Education thing die the quiet death that it deserves."

The official noted the clear objectives of redress and development within the LiEP. He quite directly connected the importance of language policy at basic education level (i.e. primary and secondary) to the outcomes that seen not only at tertiary level, but in the emergence of the qualified and professional class. He presented the example of a friend:

> I have a friend who is a Chartered Accountant, and he'll tell you that [there is] a large number of [students who graduate as] CAs who learn through Afrikaans, and he'll say – because he's Venda, "Imagine if I did my CA [studies] in Venda *[sic]*, I'd have long passed these things".

So, in summary: the absence of a single ideological position from the DBE is a fundamental constraint working against the LiEP. A second fundamental constraint working with this first constraint is the complete side-lining of the LiEP in multiple ways: other policies, programmes and activities in the DBE's work, e.g., the ANAs and NCS-CAPS assessments, ignore the LiEP; government officials do not support its principle position of additive multilingualism; and no one has done any work to update or complete the LiEP to align with curricula or new developments or evolving requirements in schools. These findings echo and confirm those of Plüddemann (2015), who points to a policy 'gridlock' consisting of violation of the LiEP "with the tacit approval of provincial education departments" (p. 196).

5.6 Constraints of Policy Management

5.6.1 Constraint 3: Attitudes as Constraints

Broader social attitudes which influence stakeholders, and are held by stakeholders, also come into play, even where there is no direct reference to the LiEP. Interviewee D said that,

despite the integrationist approach of the LiEP, assimilationist attitudes continue to dominate in education broadly in SA, but also within the DBE. There seems to be a prevailing belief, according to Interviewee F, that African languages are simply not good enough for use as LoLT / MOI at any level beyond Grade 3. Many officials, educators and parents seem to think that learning through languages is a zero-sum game, i.e. that learning in one language impedes or cancels out learning in another language. Interviewee E echoed this, stating that people often believe that they must choose between English and their own language. For Interviewee A, damaging negative attitudes towards the country's diversity and multilingual character are displayed mainly by white, English-speaking South Africans, but increasingly by other demographic groupings in South Africa. Instances of these displays include effort-free mispronunciation of African-language names and words; ridiculing non-native English accents; and the ubiquitous assumption by monolingual English speakers that they will and should be understood wherever they go in South Africa. The fact that most monolingual or bilingual (specifically, *tweetalig*, i.e. Afrikaans – English bilingual) South Africans have not learned and see no need to learn an African language is arguably the strongest indicator of a negative attitude.

In a social environment characterised by high levels of inequality and regular high-profile incidents of racial prejudice and discrimination, the attitudes of speakers of Afrikaans and black African languages towards one another is fraught with tensions. One example worth describing is the ongoing public dispute between the head of the Gauteng Province Education Department and various organisations representing (or purporting to represent people affiliated to) the Afrikaans language and culture, such as political party Vryheid (Freedom) Front Plus (Masondo, 2015; Phakgadi, 2017; van Staden, 2017). The department head is convinced that SGBs of Afrikaans-medium schools use language as a proxy for race and as a reason to keep out black schoolchildren, thereby maintaining the majority (or almost exclusively) white status quo. Defenders of these schools argue that Afrikaans speakers, like speakers of all official languages, have the right to education in their own language. While much more could here be said about the underlying overt and covert power dynamics in this controversy (Lukes, 2005), the point being made here is only that there are significantly different – and generally antagonistic – attitudes.

The DBE official referenced the crucial impact that assumptions and attitudes have on the policy in day-to-day practice. Attitudes of people in South Africa are often inimical to the approach espoused in the LiEP, because there is an assumption that those who have made it have made it *because* they first mastered English. According to him, the advancement of mother tongues and the LiEP philosophy of additive multilingualism requires a "literate society". It is only the sophisticated academic and bureaucratic types who have been converted to the importance of MTE:

> But you can't preach the [benefits of MTE] to someone who is not literate because they look at those who are literate and deduct *[sic]* that they are where they are through English because they're good at English… so it'll be very hard for the Minister [of Basic Education] to make such a pronouncement to say, "From next year learners will learn through the vernac". There'll be a public outcry to say, "This minister is not serious".

This automatic association of quality education with education in English is confirmation of official awareness of three phenomena previously described: negative attitudes towards African languages, English hegemony, and elite closure. According to Carol Myers-Scotton, elite closure is "a type of social mobilization strategy by which those persons in power establish or maintain their powers via linguistic choices" (Myers-Scotton, 1993, p. 149). The government official further noted in some detail the ongoing hegemony of English (and Afrikaans), despite the Constitution's eleven official languages, and the assistance given to this hegemony by "a little of a clause, 'Where it is practicable' – and this can mean so many things".

These phenomena together result in a vicious circle: the negative view of African languages (Dalvit et al., 2009; Heugh, 2000), the dominance of English (Alexander, 2005) and the elites' loud preference for English (Trudell, 2010) produce a biased view that accentuates any negative report regarding African languages, and ignores English's negative impacts, further driving the self-fulfilling view that the dominance of English is natural and proper and that it should be prioritised above all else. Even modest attempts to try to demonstrate otherwise may be seen as a dangerous, even destructive waste of time.

5.6.2 Constraint 4: Resources

Resourcing was the next key theme raised in the interviews. Before exploring the matter of resourcing, it is appropriate to preface it with a discussion about political will and political clarity, as these are essential to any committed application of adequate resources to this or any policy objective (Mead, 2015). As stated earlier, the DBE has not successfully presented a unified front in its treatment of the LiEP, at least according to Interviewee D. In the eyes of Interviewee B, the SA government's overarching perspective was inadequate and flawed from the beginning. In his view, "making every language official was an easy political solution", with no serious thought given to appreciating and addressing the challenges of realising such a political solution. The experiences as "academic campaigners" of Interviewees C and E have shown them that shifts in the political landscape can have permanent, devastating effects on projects and programmes. Not only can shifts from one party to another – as happened in the Western Cape in the mid-2000s – make a profound impact, so too can a change in administration, as happened in 2009 when President Mbeki was replaced by President Zuma (both from the ANC). This change appears to have precipitated change that could be "felt" down to the districts where a language pilot project was running. Interviewee G's project in Gauteng received consistently lukewarm support from the PDE, irrespective of the administration in charge. Thus, limited resourcing as a constraint is modulated by the identity of the political regime, specifically its priorities and its knowledge and interest in education.

Resourcing plays a role in the fulfilment of the LiEP at several different levels. At the highest, broadest level, school and district resourcing impacts on the capacity and ability of learners to learn, whether in their preferred (home) language or in any other language. Thus, according to Interviewee D, in the 2006 PIRLS, there was very little difference in the performance of South African learners who did the tests in African languages compared with those who did the tests in English. They performed equally poorly, which implies that the challenges faced by the learners related more to how they were taught literacy, rather than how they were taught English or the African language. This pedagogical point is an important one to make, even though it is not the focus of this research report: in many instances the quality of education is simply poor, irrespective of the language in which it is

(supposed to be) delivered (L. Wright, 2012). This is a challenge that must be addressed, but it is outside the scope of this research report.

The next level can be described as the provision of teachers who are adequately prepared and equipped to teach the right content at the right level in the various official languages. According to Interviewee E, in general, most teachers are unaware of the LiEP. This is not surprising, given the DBE's own indifference towards the LiEP, as confirmed by the DBE interviewee. However, as they are "at the coalface", the teachers recognise the needs of the learners and many realise that they need to provide support to them in African languages. Interviewee E is aware of teachers who have grouped together in order to collaborate, supporting one another through the sharing of ideas and resources, as well as mutual encouragement. However, her experience is that their understanding of additive multilingualism is not strong. This understanding is necessary as they invariably must support the children's progress towards acquiring English for academic purposes. As described in the next section, there is a significant annual shortfall in the provision of home-language teachers, just for FP, and this is expected to grow significantly by 2020 in the absence of major intervention (Green et al., 2014). Even if it is assumed that these teachers have acquired the appropriate levels of preparation and qualification, the next key question is: how well are they supported in the system?

It goes almost without saying that English- and Afrikaans-medium teachers have a plethora of resources, physical and virtual, available to them wherever they turn. This is a result of the global and de facto local dominance of English in virtually all spheres of life, as well as the legacy of the concerted promotion of Afrikaans throughout the decades of apartheid in South Africa (Steyn, 2016). In contrast, there are few resources available to African language-medium teachers. For example, there are relatively few dictionaries published in black African languages, with even popular reprints not necessarily undergoing what could be considered routine updates (Nkomo, 2015). This is a view also expressed directly by Interviewee C, and indirectly by others, such as E. Teachers receive little direct support, and are generally left to fend for themselves to find or create resources that they can use to support the learning of their classes. Even if the government were to put funds towards the acquisition of African-language resources, there would be few targets available on which to spend the money. According to Interviewee E, from the early 2000s, the government

started to put funding towards Language Centres, which were under the auspices of the Department of Arts and Culture. Interviewee A cited an example of a student-driven African-language initiative on a university campus struggling to find support even through official DHET channels.

According to Interviewee G, when all things are considered, the cost of producing materials of sufficient quality and quantity to serve a multilingual society may be quite affordable in the context of a large education budget. Studies estimating the costs of producing learning materials in several languages for other countries' education systems suggest that this cost is, at least, unlikely to be prohibitive (Vawda & Patrinos, 1999). However, while the empirical work of determining if this is in fact the case for SA has not yet been done, the cost of failure of the current system, with its very high levels of dropout and failure, has also not been assessed for comparison. It is this cost, together with the associated long-term costs of repetition, delays in completion, inefficiency, and of managing and supporting an annually growing cohort of school-leavers with little or no prospects of employment, that must be compared against the cost of financing and implementing the production, introduction and usage of education materials in African languages.

On the resourcing theme, the DBE official noted that he is concerned that the country has not reached the appropriate level of "readiness" to use African languages as LoLTs. This appeared to be less a reference to financial and material resources, and more to the predominant mind-set around South African education. He noted that certain aspects of other supportive policies, such as the Official Languages Act (RSA, 2012), were already law, but were not being used to promote African languages. Even the DBE itself has not yet completed the establishment of a fully functional Language Unit in the department.

The production of Learning and Teaching Support Materials such as textbooks, readers and dictionaries is ongoing, but would require significant further investment. Publishers such as Oxford University Press and Maskew-Miller have indicated a willingness to "come on board" and support publishing. The official noted that the project leader of the Cofimvaba project has previously worked successfully with publishers in the Western Cape.

Other structures for language development exist under the auspices of the PanSALB, but these are generally “not productive” in his view.

In summary: resourcing is a critical issue, and currently a constraint in the South African context. However, availability of resources is not the key problem, but rather the absence of the decisive application of resources, following appropriately conducted and disseminated research to drive a shift in attitude and teaching focus. Such research could show that the cost of the status quo is higher than the cost of provision of the right educational resources, including teacher training. In any case, a realistic quantification of the costs – particularly one that factors in opportunities for technology-based “short-cuts” – is required.

5.6.3 Constraint 5: Curriculum Domination

The theme of the curriculum content and development is arguably the central theme of all the key themes identified. Essentially, according to Interviewee D, curriculum policy “has overtaken everything else”, including the LiEP. At every key stage of curriculum policy-making, curriculum planning and curriculum revision, there has been little, if any, consideration given to languages as MOIs. From the preparation of Curriculum 2005 [Outcomes-Based Education] in 1996/97 to the Revised National Curriculum Statement in 2002 to the National Curriculum Statement (NCS) (2009) to the National Curriculum Statement Grades R-12 incorporating the CAPS (2012), at no time during the process was direct, concerted consideration given to the integration of the LiEP with the plans, or at least the parallel development of the revised curricula in terms that could enable a harmonisation between the curriculum and the LiEP.

The current curriculum, NCS-CAPS, was developed with the intention of providing a more content-driven approach for teachers, with teaching plans, and performance assessment built-in. As an indication of the omission of consideration of the LiEP, all assessment is assumed to occur in English or Afrikaans – except for assessment in African languages as subjects. Thus, according to Interviewee D, the assessment angle – both internal assessments such as school tests, ANAs and matric exams, and external assessments, such as the PIRLS and TIMSS annual assessments – has played a significant role in undermining

the intentions and implementation of the LiEP. It is virtually impossible to reverse-engineer compliance and harmony with the LiEP if it has to be done after the fact. In other words, the pedagogic and assessment orientation of the NCS/CAPS directly violates the LiEP.

There have been other casualties of the frequent changes to the school curriculum. For example, according to Interviewee G, one study aiming to take African-language instruction all the way through to Matric level was scrapped with the introduction of the latest curriculum. The LiEP does not appear to occupy a significant position even in the mind of the department official who was interviewed, despite the conceptual centrality of the LiEP to his role in the Department. He was quite clearly familiar with it, but his responses indicated that the acknowledgement of the LiEP tended to be in the context of its breach by the DBE, rather than in adherence to it.

So, in summary, curriculum planners, including all those associated with the Department of Education at the time of curriculum revisions, did not have an orientation that envisaged language as a resource (Plüddemann, 2015), per the LiEP (lines 94-95). Generally, this remains the case. It resulted in the development of curriculum completely separately from language policy (Heugh, 2000, 2013), to the ongoing detriment of the learners whom both the curriculum and the language policy are meant to serve. Incidentally, this separation reflected and continues to reflect the almost overwhelming hegemony of English in the environment, experience, and outlook of curriculum planners, and, furthermore, exemplifies elite closure in a bureaucratic and academic setting.

5.6.4 Constraint 6: Limitations of Teachers

Another key theme was that of teachers and the education system. According to Interviewee B, a good South African school should be characterised as one "where English or Afrikaans is not the dominant language – it should be one where isiXhosa or isiNdebele or SeSotho or isiZulu is the dominant language and [where] English is taught well as a secondary language". The constraint here is that English is not taught well in most of these schools. And because English is the LoLT, therefore little is taught well in these schools. The relatively sudden switch to full-on English instruction in the aftermath of the 1976 student protests led to a decline in the performance of black students, as illustrated by the steady

annual slide in the matriculation examinations pass rate (Heugh, 1999, 2013). Interviewee F's interpretation is that the proficiency of black teachers in English was not high enough to carry their students through. Despite the inadequacy of English teaching in South Africa over several decades, Interviewee F noted that since 1976, teachers are trained *in English* to teach African languages. This means that they are not driven or encouraged to develop materials in their own languages, and English, poorly mastered, remains the gatekeeper to advanced linguistic and pedagogical knowledge even in those languages.

The teacher unions have generally not come to grips with the contradictions between the LiEP and teaching practices, between the linguistic-educational needs of learners and the tools with which teachers meet those needs. According to Interviewee F, union leaders "get the depth and the enormity of the problem but they are so overwhelmed" by its seemingly intractable nature. Interviewee D disagreed with this view, stating that "language policy issue has never been in the foreground of the thinking of the major unions, or in the thinking of the state in regard to teacher education policy". For this interviewee, this is disappointing, because the unions – especially the SADTU, which represents the majority of teachers in public schools – hold significant power and influence:

> If SADTU were to say we want to push for a mother-tongue-based bilingual programme wherever possible — because it is in the interests of learners and most teachers are bilingual — if they did that, they would have a far bigger impact on learning than on merely bread-and-butter issues.

Some teacher degrees include a second language as a requirement for graduation. However, considerations of language generally do not go beyond thinking of language as a subject. But, in Interviewee D's experience, this is changing. Educationists are aware of the importance of MTE, and as an example of practical effects of this awareness, one university in SA has launched a Bachelor of Education degree programme in which some of the content is presented in Afrikaans and one African language. These teachers will go into service at FP (Grade 0 – 3), where there is significant MTE.

Noting the importance of teachers to the effective implementation of the LiEP, the DBE official conceded that teacher availability remained problematic, referring to the supply of appropriately qualified and equipped teachers as a "challenge". In particular, the

introduction of black African teachers who would be able not only to teach within the IIAL programme, but also to teach in African languages in FP and beyond, is proving to be a pressing difficulty.

5.7 Constraints of Policy Practice

Two constraints of practice consistently arose throughout the interviews, and were recognised as themes. The first is the ongoing hegemony of English, and the second is elite closure.

5.7.1 Constraint 7: The Hegemony of English

Virtually all the interviewees expressed concern that this is phenomenon simply continues to be growing stronger, rather than weaker, with time. Interviewee C described a "triangular" or pyramidal arrangement of South African languages, with English alone at the apex, Afrikaans occupying the middle level below, and all nine African languages on the base level. Interviewee E observed that "monolingual ideology seems to dominate in SA". Interviewee F discussed hegemony from a historical perspective, noting that part of the South African story is that, for a long time, English speakers have held and continue to hold the advantage. They are therefore "anti-transformation in the language environment." He added that organised private efforts, such as the Anglo-American Fund promoting English in townships, and the centuries-old efforts of mission schools, have fortified English hegemony. Other interviewees spoke of further direct effects of the hegemony of English on education. English has become so dominant, according to Interviewee C, that it requires almost no active supporters: there is everywhere in SA a "passive assent to [its] power", since it is so pervasively valuable and aspirational: "'We know [mother-tongue-based education] is important, we know it will be better, we know it's educational, but it's not practically possible.' This is the hegemony speaking."

The direct result of this is a tendency to subtractive language policy. This is an approach by which a child learns English through a home language such as Sesotho, and once a certain level of proficiency is achieved in English, the child is discouraged from maintaining and improving her Sesotho, until it is discarded and replaced by English as an academic language (LoLT). Interviewee C additionally observed that this position is not easily reversed.

Even policies that invite and encourage the use of African languages in formal spaces, such as universities, may be designed in such a way as to reinforce the dominance of English. For example, Interviewee A described how so-called "scaffolding" approaches, which are encouraged at some universities for struggling black students struggling with English, still assume the ongoing dominance of English. The students are given support to help them grasp concepts using their own languages until their English is good enough to enable them to continue their studies fully in English. These are the higher-education analogy of subtractive language policy at basic education level. In these institutions' policies, and even *in the LiEP itself*, English is implicitly promoted whenever phraseology such as "parent choice" and "where possible" or "bearing in mind financial constraints" is included in policy. The net result of this is the continuation of a "tacit policy of monolingualism" (Kotzé & Hibbert, 2010, p. 4).

As alluded to earlier, the official referred directly or indirectly to both the hegemony of English (and Afrikaans to a lesser extent), and to the significant role played by elites in promoting and maintaining the status of English above other languages, and in restricting access to socioeconomic opportunities to others with the help of their instrumental mastery over English (Alexander, 2005).

5.7.2 Constraint 8: Elite Closure

The second constraint of practice, which is directly dependent on the first one mentioned above, is the concept of elite closure (Myers-Scotton, 1993). It was mentioned explicitly or implicitly by several interviewees, including B, C and D. Strong elite closure occurs where three factors coincide:

> (a) [Where] the varieties necessary for socioeconomic mobility are non-native for many; (b) when universal education is not available; and (c) when those varieties are not taught extensively in the schools. (Myers-Scotton, 1993, p. 152)

Interviewee C argued that the ANC is actually responsible for creating a situation in which English is preeminent in the South African linguistic landscape. According to him, since the 1930s or 1940s, the leadership of the ANC has consistently valorised English above all other languages. This leadership elite has always communicated in English, and thus has carried

English as a symbol of upward mobility for all black South Africans. Interviewee F stated that elites are decision-makers who, mistakenly and often unconsciously, assume that the rest of South Africa are as fortunate as they are, in terms of their levels of exposure to English and resultant education. In South Africa it could be argued that while elite closure in South Africa is "strong" by definition – (a) the language of socioeconomic mobility, English (or Afrikaans) is non-native to most; (b) education standards countrywide are highly variable, and low for the poor majority; (c) the English education received by most is of poor standard – in fact, the active efforts of elites in limiting opportunity to wider groups of people, or in selectively promoting access to resources, are generally haphazard and incidental (i.e. weak), rather than systematic and consistent. The effectiveness of elite closure in South Africa is demonstrated in the fact that those who are excluded (generally lower middle-class and poor South Africans) embrace the tools of their exclusion, by, for example, insisting on education in a foreign and unfamiliar language. The language remains a strong, persuasive symbol of upward mobility, even if it generates nil benefit to the average person.

5.8 Tackling Constraints: Language Activists

The final key theme was that of change-makers and activists. The interviewees demonstrated a wide knowledge of language projects and programmes and other efforts aiming to alter the language usage patterns in the education system. Among their professional and personal contacts, they know of several "language activists". Some of the interviewees themselves may be considered activists, given their extensive involvement in creating and implementing some projects.

The DBE official also referred often to the Cofimvaba pilot programme, in which 71 Eastern Cape schools are participating. In these schools, isiXhosa is being used as LoLT, i.e. all subjects are being taught in the medium of isiXhosa. Annually isiXhosa medium is taken up a grade – as of 2017, the schools are teaching up to Grade 9 in isiXhosa. To date verbal report-back has been positive; however, there has been no recent formal report-back to the department. This project appears to the be flagship MTE project for the national DBE. Other than one other school in Cradock (also in the Eastern Cape) that has gone even beyond Grade 9 with isiXhosa as LoLT, there are no other officially recognised major

programmes, pilots or experiments underway. “Country readiness” remains an important theme for the official, which will be catalysed mainly by a change in mind-set for a large, critical mass of citizens. However, what the department is doing to contribute to this mind-set shift is unclear.

5.9 Conclusion

The LiEP is an intriguing example of a policy that is trapped in the no-man’s land between policy adoption and policy implementation (Hupe & Hill, 2016). From the expert interviews, it is clear that the LiEP has been viewed as inadequate by most experts. The language-in-education landscape in South Africa has been and remains fraught with problematic attitudes, ideological uncertainties, misunderstandings of research findings for pedagogy in plurilingual settings, and resource inadequacies. The LiEP in its present form is not only *not* appropriately constructed and *not* configured to be effective in this contested and complex terrain, but it has also been overrun by other policy instruments (particularly the curriculum revisions) and effectively ignored, where it could be relevant to language policy management and practice considerations and decisions. Officials in the national DBE have allowed the LiEP to be side-lined in practice. This is partly due to their own appreciation of the sensitivity of language issues in South Africa, and partly to the seemingly intractable nature of the difficulties of encouraging a limited, empirically inadequate form of MTE, while advocating for quality education under circumstances of severe resource constraints. English continues, in the words of Alexander (1999), to seem both “unassailable and unattainable” (p. 3).

Unfortunate historical associations and the urgency of the challenges in primary education tempt officials, teachers and parents to take short-cuts that ignore the empirical evidence of the importance of extended MTE before adoption of a new LoLT. Teachers and activists who recognise the linguistic and educational needs of learners and create or take opportunities to meet these needs seem to be running lonely, difficult races with little formal or official support. Universities, however, appear to be making significant strides towards addressing the major shortfalls of teachers able to teach in African languages as LoLTs, and are making some progress in shifting attitudes towards the wider use of African languages in the academe. Much of this progress seems to be happening with little policy

management input from the departments of education. The Cofimvaba project in the Eastern Cape appears to be the DBE's flagship programme for the promotion of African languages in education, and for a prominent example of successful extended MTE, if not also of additive bilingualism.

SGBs appear to be playing an insignificant role entrenching or changing the status quo. There were seldom references to them during the interviews, despite some explicit questions about them being posed. It may be premature to conclude that they are not relevant contributors to the patterns of management and practice that have been observed, particularly given their role and mandate in the SA schools system and findings of other researchers. Indeed, in at least one example of recent controversies that have flared up regarding the use of Afrikaans, in particular, in a public school, the SGB has emerged as a key player (Times Live, 2018b).

The DBE's own statistical overview document has turned out to be problematic particularly where it touches on African languages as LoLT. It has been criticised as inaccurate by the government official that was interviewed. However, at least some of its broad observations – such as the identification of an increase in FP learners learning in the own home languages (from 55% in 1998 to 80% in 2007) – can be taken as being directionally and even quantitatively reliable. Research into the availability of FP language teachers indicates that there remains a shortfall in teachers, which will persist for a number of years. The absence of any measures of effectiveness of home language teaching in the DBE report means that the increases in home language learners can still be reconciled with this shortage. This document refers to data that are now ten years old: assuming that it is true that no update(s) and/or other document(s) covering similar ground exist, this suggests a significant policy management gap. Without up-to-date and properly constructed management tools such as surveys and accurate statistical reports, it will remain very difficult for the DBE to make a real impact in terms of progress towards realising the LiEP, and it will struggle to empower effectively other agents (such as schools and activists) to achieve progress in their realms.

Chapter 6 – Conclusion

6.1 Introduction

While the South African education system is beset by a myriad of serious problems, I have identified the LiEP and the cascade of issues arising from its controversial formulation, status and implementation as the focus of my research report.

The objective of this research report has been to uncover the constraints holding back achievement of the goals of the LiEP, through answering two fundamental questions: (1) what are the constraints to the realisation of the LiEP contained within its construction "on paper"? and (2) what are the constraints to the realisation of the LiEP that occur "out there", i.e. in the world where people and institutions act and interact?

In order to address the objective outlined above, and to answer the key questions, I have adopted the Spolsky ideology, management and practice framework, and applied these systematically to the two questions. This systematic application has resulted in the two results chapters preceding this final chapter, and the key findings from these two chapters are recapitulated below, and connected back to the objective, as well as forward to the implications of the study for the South African educational and political / policy spheres, and potential avenues for further study.

6.2 The Policy on Paper: Findings and Implications

This research report has examined the South African LiEP document in detail. This researcher is not aware of a documentary analysis conducted on the LiEP document to a comparable level of detail. This analysis has shown that despite its ambition, the LiEP is a limited document which was hamstrung at conception by an inadequate process of development and creation, and further limited in subsequent years by being side-lined by all the relevant authorities and most role-players in education.

6.2.1 Ideology Level

Fundamentally, the LiEP is deficient in that it is "lop-sided". It is effectively Part 1 of a two-part policy whose Part 2 never arrived, due to being insulated from and overridden by curriculum policy, and blocked by the reluctance to make the difficult decisions, such as the choice of the "delivery system" for additive bilingualism.

Several constraints that arise from the policy on paper were identified. The first constraint is the consultation-based approach to policy development in South Africa. In a multi-class, multi-ethnic society with a chequered history of marginalisation of people, it is difficult and unlikely that consensus can be reached on highly controversial matters such as the finalisation and application of a language policy. Entrenched interests clash with the interests of those who want to see significant change to the status quo. Further, the failure to define *multilingualism* in the LiEP, as well as the use of vague terms such as "development of the official languages" result in a policy that is trapped in an ideological no-man's-land. The policy also falls short in failing to outline (the beginnings of) a BEE programme for language, which is precisely what could have catalysed a route to implementation, by linking broadened language use directly to the economic transformation of the nation.

The Norms and Standards section of the policy ironically fails to identify appropriate norms and standards in terms of the outcomes that should be expected from the process of choosing a LoLT. It also fails to recognise that there is material *prejudice* occurring in the selection of a LoLT, with the parent(s) of the learner having *prejudged* from current circumstances that they would prefer English to their home language. This prejudgement is a rational but pedagogically uninformed choice, and a policy such as the LiEP should be directed at supporting the making of fully informed choices.

Broadly, the LiEP remains ideologically relevant, although now it has been overtaken by research findings of the past twenty years (e.g. with respect to translanguaging, i.e. encouraging the use of multiple linguistic resources concurrently in an educational setting) (Heugh, 2015; Makalela, 2015; Probyn, 2015).

The implications for the DBE, as custodian of the LiEP, are fairly straightforward. The LiEP is due for revision and completion. While the consultation-based approach remains a characteristic of South African policy-making, it does not need to be an insurmountable obstacle. Constitutional obligations and transformational ideals should guide the enhancement of the LiEP. It is beyond the scope of this research report to recommend a process for revision of the LiEP; however, a process similar to the LANGTAG approach of the mid-1990s, involving experts and stakeholders, would not be altogether out of place.

6.2.2 Management Levels

The separation of the development of the LiEP from the development of the new curriculum during 1996-97 set the stage for the ongoing "orphanhood" of the LiEP. It remains a neglected policy, with curriculum policy-makers and planners routinely giving it no consideration. This unresponsiveness has occurred in both directions: the LiEP was due to be updated in response to the new curriculum (see lines 12-13 of LiEP), but this never happened. The DBE's focus is almost completely on curriculum, and language is considered mainly in terms of languages as subjects, not as media of communication (LoLTs).

The deferral of important policy choices to a later date has already been referred to in the previous section, as it is also a matter of ideological approach. The absence of a mechanism to ensure that the choice of LoLT becomes a realistic and meaningful choice for most parents and learners is a significant flaw/constraint of policy management.

The high level of discretion that the SGB has in determining how to promote multilingualism is a constraint in achieving any sort of significant and consistent progress across the education system. It is worth noting, however, that this high level of discretion appears to be under reconsideration, as the DBE has recently proposed changes to the SASA, including a clause that would require the SGB to get approval of its school language policy (mainly the choice of LoLT(s)) from the provincial head of the education department (DBE, 2017a).

The arbitrary class size thresholds that justify the introduction of a LoLT are a serious and unnecessary constraint against realising the goals of the LiEP. The document itself acknowledges the need for creative solutions to addressing resource limitations (LiEP, line 145) – these solutions should not be constrained by arbitrary thresholds.

If a world in which the LiEP is implemented is desirable, then the primary obvious implication is that the LiEP (pre- or post-revision) must be brought to bear on the current curriculum. This not only means that curriculum planners should discuss its implementation in various LoLTs, it also means the curriculum itself needs to be translated and adapted for effective pedagogic application via these various LoLTs.

6.3 The Policy in Public: Findings and Implications

In this chapter, two objectives have been pursued. Firstly, this chapter has identified and analytically described current practices in South Africa that constrain the implementation of the aims of the LiEP. These descriptions arise from the thematic analysis of interviews conducted with experts in academia, the teaching (and related) professions, and government. Secondly, the chapter has also presented some secondary research into what is publicly known and practised, specifically by examining a key document (*The Status of the Language of Learning and Teaching (LoLT) in South African Public Schools: A Quantitative Overview*) commissioned by the Department of Basic Education to quantify language usage (especially LoLT choice) across schools in the country.

6.3.1 Ideology Levels

The view that the LiEP was an unfulfilled promise was expressed in various ways during the interviews. Some acknowledged that it was structured in such a way as to be impossible to implement. Opinions differed on whether this was deliberate. In any case, the absence of implementation guidelines has been a definite barrier on public implementation of the LiEP. It has not been possible within the current constraints to ascertain the extent to which the LiEP regulations (or, possibly, the absence thereof) aid or impede implementation of the policy.

The disconnect of the LiEP from any of the debates and activities within the DBE, such as the setting of the ANAs, or curriculum planning – not least because the DBE does not have a single official view on language policy – has also ensured that in the "real world", language-policy issues are hermetically sealed off from the "real work" of the Department, prescribing, implementing and managing education policies.

The key implication here is that the DBE needs to affirm its own policy position. This means, firstly, clear support for the LiEP and/or, to the extent that it considers the LiEP incomplete or unclear, its own expansion and clarification on the LiEP. Secondly, this means a commitment to support and drive the implementation of this LiEP (plus clarification). This is a policy that has nowhere been formally repealed or superseded, and under these circumstances it is trite to state that the DBE should be implementing it, as it implements or should implement all its policies.

6.3.2 Management Levels

Public attitudes constitute a major constraint working against the LiEP. Social and historical dynamics influence the attitudes not only of the general public, but also of policy-makers and educationists. Broadly, these attitudes are negative towards the use of African languages beyond a few narrow domains and levels (the home, traditional spaces, the informal (or "second") economy, up to Grade 3), and favourable towards English as the language of wider communication, including the economy, for technical and commercial activities, and in advanced education (anything beyond Grade 3). A significant element in the limited impact of LPP in many settings is the assumption that language policy functions as a technical instrument that can be efficiently applied in a rational, top-down fashion, not accounting for the power of attitudes (Lo Bianco, 2010, cited in Leibowitz, 2015, p. 36). These attitudes become generally self-fulfilling prophecies because of the vicious circles they generate and drive (elites say, "language X belongs only in traditional circles"; this discourages development of language X; elites see no development of language X; this confirms elites' belief that language X belongs only in traditional circles).

The appropriate marshalling of resources is a key management-based constraint. Too many schools in South Africa are simply under-resourced to such an extent that the issues raised by the LiEP are irrelevant to them – i.e. learners suffer and fall behind irrespective of the language in which they are taught. However, as this most basic level of resourcing is addressed, it becomes clear that there are not enough equipped, competent African-language teachers, *and* there are not enough appropriate materials for these teachers to use in classes, *and* these teachers do not receive adequate support within the system.

The preponderance of curriculum planning above all other considerations in the education system, including the LiEP, is a major feature of the landscape. The tenets and requirement of the LiEP cannot be reverse-engineered into curriculum and assessment planning. And so, since it is an ignored element, the LiEP and its requirements remain outside the curriculum net.

Lastly, the limitations of teachers and their unions strongly constrain progress in achieving the aims of the LiEP. Teachers and unions could be major advocates of the LiEP, not least because it would benefit them as it would formally allow teachers to use linguistic resources they frequently "leave behind at the door", thus empowering them to be more effective and fulfilled in their work.

There are implications here that touch on the DBE, but go much beyond it. The liaison and coordination by the DBE with its internal stakeholders (such as curriculum planning units and personnel) and external stakeholders (such as parents, SGBs, teachers and teacher unions) is essential for achieving any significant changes in favour of LiEP's goals. Scoping and planning for the upscaling of resource provision to support teacher development and material production is a crucial project for the DBE, in association with for-profit and non-profit partners, as well as the aforementioned stakeholders. Achieving attitude shifts across the board is a major challenge and will take significant time and effort; however, it should start within the Department. Thereafter, the DBE can commit and plan to educate and influence influential people and entities within education and across society, to bring them to understand, appreciate and support the aims of the LiEP.

6.3.3 Practice Levels

The ongoing hegemony of English in South African society is a major constraint. Even well-meaning efforts to support and supplement education in various quarters tend to reinforce this dominance, by positioning mastery of English as the gold standard or the ultimate goal.

Elite closure is a constraint closely related to the hegemony of English. It is the means by which elites establish and maintain their power in society by using English as a barrier that creates a clear distinction between them and non-elites, and thus they sustain the power dynamic. The non-elites fully buy into this dynamic, believing that acquisition of English is

the only route out of their situation, and that their own languages are of no importance in the face of English. The hegemony of English supports this perspective, as they do not observe any of their peers advancing without it.

It is difficult to overstate the magnitude of the challenge facing anyone who wishes to undermine the hegemony of English in the world. This elite researcher does not miss the irony of making such a statement within a research report written *in English*. Nevertheless, it must be done, consistently and pragmatically. The objective is not to replace English with another hegemonic language; rather, it is to try to ensure that other languages, particularly languages of socioeconomic minorities, are developed and maintained for the benefit of those minorities and the societies of which they are a part. A significant burden lies on elites to reject elite closure and deliberately and persistently valorise languages other than English in their personal (private) and professional (public) spheres.

6.4 The Future of the Language in Education Policy

This study has demonstrated some of the key weaknesses in the LiEP document that give rise to circumstances constraining the effective implementation of the policy. It has also revealed constraints that arise from beliefs about language policy in education, behaviours associated with language management in education, and practices associated with language use in education. The challenges that lie ahead for officials, parents, language practitioners and activists in creating new contours to transform the landscape have also been outlined. It remains now to sketch some of the options, possibilities and challenges of the future.

A number of authors in the early 2000s predicted that the LiEP would not succeed in the environment as it then was (Desai, 2001; Heugh, 2002; Moyo, 2001). Notably, Moyo (2001) presciently recognised equipping of teachers, production of materials, elitist attitudes and political will as key bottlenecks to successful implementation. Sadly, such predictions have broadly proven to be true. The question is: What needs to happen in order for the next 20 years to be radically and positively different from the previous 20 years in respect of LiEP implementation?

Probably the first place for significant change is the DBE itself. As mentioned previously in this conclusion, change needs to begin within the DBE as it defines and unifies its own

position on language in education. In order to obtain the requisite political support, a firm bureaucratic position needs to be identified, maintained and promoted to the political principals. The DBE should then plan to educate and influence influential people and entities within and outside education, so that they understand, appreciate and support the aims of the LiEP. The fact that the LiEP has not been withdrawn should be positively interpreted by the DBE as tacit political endorsement of the policy. The possibility that a more optimistic situation obtains – namely, that the DBE officials already hold a position, forged in the fire of years of governmental and implementation experience (Mead, 2015) – may be worthy of further exploration. My limited experience in a single encounter with one official does not support this perspective.

The second order of changes should emanate from the department and be felt in at least three key areas. The first area is in the active, visible implementation of aspects of the policy. In other words, school situations in which the policy is ignored should be called out and addressed, with the DBE assisting schools to achieve compliance. Positively, the DBE should highlight examples of schools implementing the policy correctly. The second area is in the direct promotion of additive bilingualism (or multilingualism) as a concept, and in the broader educational initiative that is required to do this effectively. This calls for the dissemination of research showing the value and efficacy of additive bilingualism and extended MTE. This calls for the support of research programmes that aim to verify and quantify the benefits of such education in the South African context. Such research should be commissioned, if the need is identified. The third area is the conceptualisation of a wider programme to change elements of the education system that are not aligned to effective multilingual education. Two specific examples of areas for change: the introduction of assessment in African languages, as this will immediately increase the relevance of the teaching in those languages. This is appropriate for well-established pedagogical reasons (Koch, 2015) as well as assessment-methodological reasons (Uni & Nishiyama, 2013).

The third order of changes addresses the wider social environment. It is neither credible nor sustainable to effect such radical changes on the education system without expecting or anticipating – indeed facilitating – corresponding changes in the wider society. Additive bilingualism should be a goal not only for the participants in the education system, but for all South Africans, particularly those whose role-modelling of additive bilingualism would be

widely influential (e.g. politicians, sportspeople, entertainers, business leaders). An education system that aims to produce competent multilingual young adults should be integrated into a society that not only recognises their language skills, but also demands and rewards these skills.

6.5 The Future of Language in Education Depends on its Future in Society

Language is the bedrock of society. There is no known human society in the present or past that has existed without language. Language is the primary medium of communication and culture – creativity, economy, philosophy, religion; love, war, peace and play – within and between human beings and human societies. So, what a society does with and about its languages is a reflection of what a society values. As Cooper (1989, cited in Mwaniki, 2004) has eloquently pointed out: "Language is the fundamental institution of society, not only because it is the first institution experienced by the individual but also because all other institutions are built upon its regulatory patterns. To plan language is to plan society" (p. 160).

It has already been observed that the LiEP makes reference to the economy only once (section 5.5.1, Line 59), and it notably fails to mention the economy within section 5.2.3 (Lines 29–32), which describes the relevance of the LiEP to the creation of a non-racial nation. Perhaps this failure may be excused by taking the initial observations here about the centrality of language to society, and by arguing that the plans for language in a society's education system are a direct reflection of the plans for the structure of that society. The extent to which such plans are clearly articulated, popularly supported and adequately resourced is the extent to which they are likely to be implementable, effective and sustainable. The lack of conviction reflected in the hesitant and (ultimately) incomplete drafting of the LiEP has made it difficult even for those in favour of its reforms to support it whole-heartedly, and consequently it has (so far) never received the moral, financial and political resources and support to be effective. The deficiencies in conviction, clarity and clout must be reversed if the LiEP is to be implemented completely and successfully.

Looking at the matter from the perspective that has been the framework of this research report: first, clear policy ideology is important to ensure that enough of the relevant parties

in education are “pulling in the right direction”. Second, probably the central issue is that of the bureaucratic and political leadership taking responsibility for language management in a domain – the school – which “by its very nature [is] committed to language management.” (Spolsky, 2009, p. 91) Effective language management includes and leads to productive development of the language, particularly in terms of status planning and corpus planning (Hornberger, 1994; Spolsky, 2009). This effective language management will inevitably and necessarily find and make links to the world beyond the narrow education sector, as corpus planning, status planning and acquisition planning must connect to fields such as publishing, media production, professional training, and so on.

Thirdly, language management that is effective to this extent will, in the long term, result in significant shifts in language practices. In reality, language management tends to be modified and constrained by practices that are determined and maintained by the status quo. Given the strong economic character of the status quo, Alexander (2005), Heugh (1999) and Kamwangamalu (2009) have pointed to the need to ensure that African languages are given economic value, or market power. Echoing Lukes’ (2005) thesis about the importance of power dynamics, Pool (1993) argues that power over language is a key to economic power and that economic power is used to gain power over language. Similarly, Mazrui (1997) argues that despite seemingly well-meant developmental efforts of global institutions in language-in-education, their methods and ulterior motives may reinforce the primacy of English over local languages, and may exacerbate the division between elites and the rest in African societies. Ultimately, and quite simply, the power and privilege accorded to [speakers of] ex-colonial languages must be directly and explicitly assigned to African languages, in a deliberate recalibration of value in the sociolinguistic market (Kamwangamalu, 2009). This is a necessary, but not sufficient, step in preserving and promoting the selected African languages and fulfilling the aims of the LiEP.

The LiEP (and in particular, the Norms and Standards Regarding Language Policy) strongly recognises and promotes a rights-based perspective on language use in education; for example, a key section within the policy is titled The Protection of Individual Rights (LiEP, lines 107–118). While a perspective that emphasises language-as-a-right has its benefits, it is important to recognise its deficits, such as its presupposition of state domination and its inherently conflictual posture, and to supplement it with the language-as-a-resource

orientation (Phaahla, 2015; Ricento & Hornberger, 1996; Ruíz, 1984). This latter orientation can immediately and directly have a positive impact on the status of a minority or undervalued language, and it highlights the relevance of cooperative language planning (Ruíz, 1984).

In summary, a radically transformed and transformative perspective on language in education can be catalytic in transforming the major social, cultural and economic patterns of South Africa that have for so long alienated, marginalised and discouraged the majority of South Africans. In the words of the African literary luminary, Ngũgĩ wa Thiong'o (1986), "Economic and political control of a people can never be complete without cultural control" (p. 93), and the converse is also true: genuine economic and political freedom cannot be attained without the achievement of true cultural liberation, grounded in the free, creative and productive use of our languages in the educational and all other spheres.

With this language-as-a-resource orientation firmly in mind, it is helpful to sketch out opportunities for further exploration and elucidation in the quest to drive the implementation of the LiEP and realise its transformative aims for the South African polity.

6.6 Directions for Action and Further Study

It has been shown that multiple factors, internal and external to the LiEP, act as constraints impeding its implementation. As far as the LiEP-based (i.e. internal) constraints are concerned, a comprehensive and consultative revision and completion of the LiEP is required. This revision must incorporate a fundamental repositioning of the LiEP within the education domain. This necessitates proper participation of stakeholders, especially curriculum planners, and will benefit from extensive dissemination of relevant research, plus the strategic inclusion of practitioners who have empirically confirmed the benefits of additive bilingualism and related linguistic-pedagogic approaches (such as translanguaging).

The most recent PIRLS results have again indicated the parlous state of literacy among Grade 4 and Grade 5 children in South Africa (Howie et al., 2017; Spaull, 2017). However, the Department of Basic Education itself appears to be leading the charge in conducting the necessary interventions to effect systemic change that will shift these literacy levels, most notably through the Early Grade Reading Study (EGRS) (DBE, 2017b). The findings of impact

from this systematic study and others, such as that exploring the link between LoLT and mathematics achievement (Mbude-Shale, 2013), require both dissemination and confirmatory validation using additional contexts and criteria. Crucially, effectively illustrating the affordability of these initiatives will be essential – the EGRS interventions cost approximately ZAR800 or less per learner at the scale of pilot study (DBE, 2017b), which translates to 4.3% of the DBE's gross annual spend per learner (National Treasury, RSA, 2014). In addition, essential work in describing the linguistic and structural features that make African languages different from English and Afrikaans and from one another, and therefore necessitate completely different pedagogic approaches (which will be developed as a result), is still in its early stages (Spaull, Pretorius, & Mohohlwane, 2018).

A diversity of excellent and promising initiatives at tertiary and professional levels exist, such as the "language mapping" project (Oliver, 2013), the development of bilingual dictionaries for FP learners (Langa, 2017), the Abantu Book Festival which promotes literature and publishing by black South Africans (Mathunjwa, 2017), and the creation of glossaries archiving indigenous knowledge in professional fields such as architecture (Frescura & Myeza, 2017). There appears to be a need for effective cataloguing, coordination and networking to maximise the reach and to optimise the impact of such efforts. Even further "left-field", but with very high relevance for an urbanised, multicultural and multilingual "melting pot" like Gauteng, is the further exploration of the potential for the use of popular culture and associated urban language variants in education (Makoni, Makoni, & Rosenberg, 2010).

Academics continue to debate whether language policy realisation from below (Oliver, 2013) or imposed from above (Desai, 2013) is the more effective strategy. While the reality will probably reflect that some mix of the two approaches is likely to be most effective, given the importance of consultation (Diallo, 2011; Mda, 1997), I am swayed towards the "imposition" end of the spectrum. This is because I believe that officials, politicians and leaders in society must lead and model the adoption of additive bi- and multilingualism, and its wider adoption will be rapid as the rest of society sees its effects on the learners in the education system. The opportunity to demonstrate how valorisation and use of a language in the wider polity, including education, is linked to both the vitality of the language and

increased effective participation of its speakers in the productive economy remains open for further study.

Broadly, these significant manifestations and opportunities for language management can and will lead to significant shifts in both language practices and (subsequently) ideologies. In this vein, it is important to note the concept of "circular causality" (van der Steen et al., 2015, p. 326). This is essentially a virtuous circle, rather than a vicious circle, in which elements in feedback loops act synchronously on one another. For example, the public valorisation of a language leads to its increased use, increased use leads to greater media exposure, greater media exposure leads to production of more creative literature, which leads to increased use in education, which leads to greater public valorisation, and so on. All of these effects typically can occur at the same time in various places, making it not so straightforward to distinguish a trigger event or starting point.

Finally, and crucially, academics and activists will need to refine both their understanding of the content of the interplay between language and pedagogy, and of how policy-makers actually absorb and apply research knowledge and insights. The capacity and inclination of public officials and politicians to review and internalise relevant research is lower than most people realise (Daviter, 2015; Mead, 2015; Öberg et al., 2015), and research has shown that it may take long periods of time for gradual changes in knowledge to occur (Daviter, 2015; Weiss, 1986), which eventually lead to policy shifts.

When all is said and done, the work has been done; namely, the demonstration of the value of education in one's own language has been shown, here and by many preceding authors: it is worthy of the cost, of the effort, of the "inconvenience" of respecting a core element of people's identity, and ennobling their pre-existing capacity to learn and to explore the world in their own languages. What remains is for practitioners with sound pedagogical concepts and understanding, officials soberly bearing the sombre burden of delivering service to their constituents, parents who care deeply about the present and future of their children, and activists whose *raison d'être* is powerfully developmental and transformative – for all of these participants in the education system to apply themselves carefully, intelligently and consistently to overcome the constraints that have been identified. This will be for the

benefit not only of their children and the nation(s) in which they dwell, but for the benefit and flourishing of future generations.

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Appendix 1: Language in Education Policy text

**Text adjusted as per description in 4.3 Overview of the LiEP Document; Line numbers added*

LANGUAGE IN EDUCATION POLICY 14 JULY 1997

1. The language in education policy documents which follow have been the subject of discussions and debate with a wide range of education stakeholders and role-players. They have also been the subject of formal public comment following their publication on 9 May 1997 (Government Notice No. 383, Vol. 17997).

2. Two policies are announced herewith, namely, the LANGUAGE IN EDUCATION POLICY IN TERMS OF SECTION 3(4)(m) OF THE NATIONAL EDUCATION POLICY ACT, 1996 (ACT 27 OF 1996), and the NORMS AND STANDARDS REGARDING LANGUAGE POLICY PUBLISHED IN TERMS OF SECTION 6(1) OF THE SOUTH AFRICAN SCHOOLS ACT, 1996. While these two policies have different objectives, they complement each other and should at all times be read together rather than separately.

3. Section 4.4 of the Language in Education Policy relates to the current situation. The new curriculum, which will be implemented from 1998, onwards, will necessitate new measures which will be announced in due course.

4. LANGUAGE IN EDUCATION POLICY IN TERMS OF SECTION 3(4)(m) OF THE NATIONAL EDUCATION POLICY ACT, 1996 (ACT 27 OF 1996)

5.1. PREAMBLE

5.2. This Language-in-Education Policy Document should be seen as part of a continuous process by which policy for language in education is being developed as part of a national language plan encompassing all sectors of society, including the deaf community. As such, it operates within the following paradigm:

5.2.1. In terms of the new Constitution of the Republic of South Africa, the government, and thus the Department of Education, recognises that our cultural diversity is a valuable national asset and hence is tasked, amongst other things, to promote multilingualism, the development of the official languages, and respect for all languages used in the country, including South African Sign Language and the languages referred to in the South African Constitution.

5.2.2. The inherited language-in-education policy in South Africa has been fraught with tensions, contradictions and sensitivities, and underpinned by racial and linguistic discrimination. A number of these discriminatory policies have affected either the access of the learners to the education system or their success within it.

5.2.3. The new language in education policy is conceived of as an integral and necessary aspect of the new government's strategy of building a non-racial nation in South Africa. It is meant to facilitate communication across the barriers of colour, language and region, while at the same time creating an environment in which respect for languages other than one's own would be encouraged.

5.2.4. This approach is in line with the fact that both societal and individual multilingualism are the global norm today, especially on the African continent. As such, it assumes that the learning of more than one language should be general practice and principle in our society. That is to say, being multilingual should be a defining characteristic of being South African. It is constructed also to counter any particularistic ethnic chauvinism or separatism through mutual understanding.

5.2.5. A wide spectrum of opinions exists as to the locally viable approaches towards multilingual education, ranging from arguments in favour of the cognitive benefits and cost-effectiveness of teaching through one medium (home language) and learning additional language(s) as subjects, to those drawing on comparative international experience demonstrating that, under appropriate conditions, most learners benefit cognitively and emotionally from the type of structured bilingual education found in dual-medium (also known as two-way immersion) programmes. Whichever route is followed, the underlying principle is to maintain home language(s) while providing access to and the effective acquisition of additional language(s). Hence, the Department's position that an additive approach to bilingualism is to be seen as the normal orientation of our language-in-education policy. With regard to the delivery system, policy will progressively be guided by the results of comparative research, both locally and internationally.

5.2.6. The right to choose the language of learning and teaching is vested in the individual. This right has, however, to be exercised within the overall framework of the obligation on the education system to promote multilingualism.

5.3. This paradigm also presupposes a more fluid relationship between languages and culture than is generally understood in the Eurocentric model which we have inherited in South Africa. It accepts a priori that there is no contradiction in a multicultural society between a core of common cultural traits, beliefs, practices, etc., and particular sectional or communal cultures. Indeed, the relationship between the two can and should be mutually reinforcing and, if properly managed, should give rise to and sustain genuine respect for the variability of the communities that constitute our emerging nation.

5.4. AIMS

5.5. The main aims of the Ministry of Education's policy for language in education are:
5.5.1. to promote full participation in society and the economy through equitable and meaningful access to education;
5.5.2. to pursue the language policy most supportive of general conceptual growth amongst learners, and hence to establish additive multilingualism as an approach to language in education;
5.5.3. to promote and develop all the official languages;
5.5.4. to support the teaching and learning of all other languages required by learners or used by communities in South Africa, including languages used for religious purposes, languages which are important for international trade and communication, and South African Sign Language, as well as Alternative and Augmentative Communication;
5.5.5. to counter disadvantages resulting from different kinds of mismatches between home languages and languages of learning and teaching;
5.5.6.to develop programmes for the redress of previously disadvantaged languages.

5.6. POLICY: LANGUAGES AS SUBJECTS

5.7.1. All learners shall offer at least one approved language as a subject in Grade 1 and Grade 2.
5.7.2.From Grade 3 (Std 1) onwards, all learners shall offer their language of learning and teaching and at least one additional approved language as subjects.
5.7.3. All language subjects shall receive equitable time and resource allocation.
5.7.4. The following promotion requirements apply to language subjects:
5.7.5.1. In Grade 1 to Grade 4 (Std 2) promotion is based on performance in one language and Mathematics. 7.5.2. From Grade 5 (Std 3) onwards, one language must be passed.
5.7.5.3. From Grade 10 to Grade 12 two languages must be passed, one on first language level, and the other on at least second language level. At least one of these languages must be an official language.
5.7.5.4. Subject to national norms and standards as determined by the Minister of Education, the level of achievement required for promotion shall be determined by the provincial education departments.

5.8. POLICY: LANGUAGE OF LEARNING AND TEACHING

The language(s) of learning and teaching in a public school must be (an) official language(s).

6.NORMS AND STANDARDS REGARDING LANGUAGE POLICY PUBLISHED IN TERMS OF SECTION 6(1) OF THE SOUTH AFRICAN SCHOOLS ACT, 1996

7. INTRODUCTION

7.1. AIM OF THESE NORMS AND STANDARDS

7.1.1. Recognising that diversity is a valuable asset, which the state is required to respect, the aim of these norms and standards is the promotion, fulfilment and development of the state's overarching language goals in school education in compliance with the Constitution, namely:

7.1.1.1.the protection, promotion, fulfilment and extension of the individual's language rights and means of communication in education; and

7.1.1.2.the facilitation of national and international communication through promotion of bi- or multilingualism through cost-efficient and effective mechanisms,

7.1.1.3.to redress the neglect of the historically disadvantaged languages in school education.

7.2.DEFINITIONS

7.2.1. In these norms and standards, unless the context otherwise indicates, words and expressions contained in the definitions in the Act shall have corresponding meanings; and the following words and phrases shall have the following meanings:

7.2.1.1. "the Act" means the South African Schools Act, Act 84 of 1996

7.2.1.2. "the Constitution" means the Constitution of the Republic of South Africa, Act 108 of 1996

7.2.1.3. "school district" means a geographical unit as determined by the relevant provincial legislation, or prevailing provincial practice

7.2.1.4. "language" means all official languages recognised in the Constitution, and also South African Sign Language, as well as Alternative and Augmentative Communication.

7.3.THE PROTECTION OF INDIVIDUAL RIGHTS

7.4.1. The parent exercises the minor learner's language rights on behalf of the minor learner. Learners who come of age, are hereafter referred to as the learner, which concept will include also the parent in the case of minor learners.
7.4.2.The learner must choose the language of teaching upon application for admission to a particular school.
7.4.3. Where a school uses the language of learning and teaching chosen by the learner, and where there is a place available in the relevant grade, the school must admit the learner.
7.4.4. Where no school in a school district offers the desired language as a medium of learning and teaching, the learner may request the provincial education department to make provision for instruction in the chosen language, and section 5.3.2 must apply. The provincial education department must make copies of the request available to all schools in the relevant school district.

7.5. THE RIGHTS AND DUTIES OF THE SCHOOL

7.6.1. Subject to any law dealing with language in education and the Constitutional rights of learners, in determining the language policy of the school, the governing body must stipulate how the school will promote multilingualism through using more than one language of learning and teaching, and/or by offering additional languages as fully-fledged subjects, and/or applying special immersion or language maintenance programmes, or through other means approved by the head of the provincial education department. (This does not apply to learners who are seriously challenged with regard to language development, intellectual development, as determined by the provincial department of education.)
7.6.2. Where there are less than 40 requests in Grades 1 to 6, or less than 35 requests in Grades 7 to 12 for instruction in a language in a given grade not already offered by a school in a particular school district, the head of the provincial department of education will determine how the needs of those learners will be met, taking into account
7.6.2.1.the duty of the state and the right of the learners in terms of the Constitution, including
7.6.2.2.the need to achieve equity,
7.6.2.3. the need to redress the results of past racially discriminatory laws and practices,
7.6.2.4. practicability, and
7.6.2.5. the advice of the governing bodies and principals of the public schools concerned.

7.7. THE RIGHTS AND DUTIES OF THE PROVINCIAL EDUCATION DEPARTMENTS
7.8.1. The provincial education department must keep a register of requests by learners for teaching in a language medium which cannot be accommodated by schools.
7.8.2. In the case of a new school, the governing body of the school in consultation with the relevant provincial authority determines the language policy of the new school in accordance with the regulations promulgated in terms of section 6(1) of the South African Schools Act, 1996.
7.8.3. It is reasonably practicable to provide education in a particular language of learning and teaching if at

least 40 in Grades 1 to 6 or 35 in Grades 7 to 12 learners in a particular grade request it in a particular school.

7.8.4. The provincial department must explore ways and means of sharing scarce human resources. It must also explore ways and means of providing alternative language maintenance programmes in schools and or school districts which cannot be provided with and or offer additional languages of teaching in the home language(s) of learners.

7.9. FURTHER STEPS

7.10.1. Any interested learner, or governing body that is dissatisfied with any decision by the head of the provincial department of education, may appeal to the MEC within a period of 60 days.

7.10.2.Any interested learner, or governing body that is dissatisfied with any decision by the MEC, may approach the Pan South African Language Board to give advice on the constitutionality and/or legality of the decision taken, or may dispute the MEC's decision by referring the matter to the Arbitration Foundation of South Africa.

7.10.3. A dispute referred to the Arbitration Foundation of South Africa must be finally resolved in accordance with the Rules of the Arbitration Foundation of Southern Africa by an arbitrator or arbitrators appointed by the Foundation.

Appendix 2: List of Interviews

Interviewee	Interviewee Type	Date
Interviewee A	Academic / Activist	30 Mar 2015
Interviewee B	Researcher	31 Mar 2015
Interviewee C	Academic	1 Apr 2015
Interviewee D	Academic	2 Apr 2015
Interviewee E	Academic / Activist	30 Apr 2015
Interviewee F	Academic	2 Jun 2015
Interviewee G	Researcher	5 Jul 2015
DBE Official [name withheld]	Government official	3 Jan 2017

Appendix 3: Interview Guide

1) In your view, what are the aims of the Language-in-Education Policy (LIEP) of South Africa?
    a) What need was it aimed at fulfilling at the time was created and introduced?
    b) Who was involved in the generation of the LIEP?
    c) Were all the right people involved in the creation of the LIEP?
    d) How well known and understood is the LIEP in your view?
2) How has the LIEP changed education in South Africa?
    a) In which areas have these changes been seen in particular? (Geographical areas, educational context areas, subject areas, etc.)
    b) Who or what has mediated these changes?
3) Which institutions are charged with the implementation of the LIEP, and how are they resourced to effect this implementation?
4) Would you say that the aims of the LIEP have been fulfilled in South Africa in 2014?
    a) Which aims?
    b) To what extent?
5) If you do not believe that (all of) the aims of the LIEP have been fulfilled,
    a) Which aims have not been fulfilled?
    b) How far from fulfilment are we?
6) In your view, what have been the constraints to the fulfilment of these aims?
    a) Is the policy itself an obstacle or constraint? If so, how?
    b) Are there particular beliefs about languages (issues/perceptions of hierarchy, preference, power) that are relevant as constraints or barriers?
    c) Are there management or institutional challenges constraining the implementation?
    d) Are there issues of a lack of will, or clashing wills, particularly at official levels?
    e) Is there a problem with a lack of a clear roadmap, which will determine who does what in the fulfilment of LIEP's aims?
    f) The players in the education system – SGBs and larger (private and public) associations of SGBs, unions, teachers (esp. language teachers), parents, linguistic experts, provincial education departments – how do they interact? Who tends to prevail when there are conflicts?

g) To what extent does the status quo drive thinking of the players in the system in a certain direction?

7) In your view, what is the South African Story? Is there / can there be a single Story?
   a) How does it differ between communities?
   b) What are the linguistic elements of this story?
   c) In terms of (achievements of) language and culture, what emotions are typically associated with this Story / History? (Pride, Shame, Anger, Joy, Sense of Loss / Nostalgia, etc.)
8) What is the place of English in South Africa?
   a) What policies (explicit and implicit) promote the adoption and use of English in South African education? What policies undermine or reduce (deliberately or otherwise) the use of English?
   b) How is English seen / treated relative to black African languages[1] (be specific) – by speakers "from each side"?
   c) How is English seen / treated relative to Afrikaans by speakers "from each side"?
   d) What is the prevailing perspective on English with respect to facilitating interaction with the rest of the wider global community? (How) Does this find expression in schools and in their language choices?
9) How would you describe the socio-linguistic situation in South Africa? *(Focus on a region / city if that helps)*
   a) All other things being equal (i.e. in areas where there is no clearly dominant language community), is there are an observable hierarchy among black African languages[1]?
   b) In your view, what are the prevailing attitudes about the use of home languages in education?
10) Do speakers of minority languages (whether considered endemic or exotic to South Africa) enjoy special protection or consideration in South Africa? If so, how is this mediated?
   a) Are these special rights evenly and consistently applied?

[1] The term "black African Language" is intended only to distinguish between Afrikaans and the other nine official languages of South Africa (excluding English), and not to impute any exclusive racial characteristics to a language.

b) Is there any observable effect of this special treatment on (official) South African languages?

11) What is the state of multilingualism in South African schools and universities?
    a) Do students/schoolchildren receive instruction in any mother tongues other than English? To what level?
    b) What is the quality of instruction in languages other than English?
    c) How would you describe the attitude of your institution towards the promotion of other languages?
    d) How has this attitude been influenced, if at all, by any external organisations?
    e) Are you aware of any educational establishments (e.g. universities) that have made significant changes in their language policies in recent times (say, since 1 Jan 2005)?
        i) What are the changes?
        ii) What drove the decision-making process in this direction?
        iii) What has been the impact of this change to date?
        iv) What levels of support do the establishments receive in the maintenance of these changes?
        v) How do the establishments communicate to official channels, fellow institutions, students, parents and other stakeholders about these changes and their effects?

12) Is there anything additional you would like to say about the LIEP, other relevant / related policies, and/or institutions involved in language policy or in promoting multilingualism, African languages, or mother tongue education?