

**THE QUINTILE RANKING SYSTEM VERSUS QUALITY EDUCATION IN
POST-APARTHEID SOUTH AFRICA: A CRITICAL ANALYSIS OF THE
SCHOOL FUNDING POLICIES**



UNIVERSITY OF THE
WITWATERSRAND,
JOHANNESBURG

A report presented by

Lesedi Onkarabetse Moletsane

Student Number: 1963523

Supervised by

Dr Thokozani Mathebula

A research report submitted to the Faculty of Humanities, University of the Witwatersrand, in
partial fulfilment of the requirements for the degree of
Master of Education

September 2025

Johannesburg

Declaration

I Lesedi Onkarabetse Moletsane declare that this research report is my own, unaided work. It is being submitted for the Degree of Master of Education at the University of the Witwatersrand, Johannesburg. It has not been submitted before for any degree or examination at any other University.

.....

(Signature of candidate)

30th day of September 2025 in University of the Witwatersrand

Dedication

To the Moletsane namesake – each hand that shaped round mud homes, each voice that called cattle to the kraals, each drop of sweat sown into the fields – rooted a lineage that now finds expression in the writing of this research report.

Abstract

This study critically analyses post-apartheid South African school funding policies, focusing on the quintile ranking system and its impact on quality education – defined as the transformation of educational inputs into fair and just learner outcomes. The study argues that uniform school funding policies – particularly the legislated quintile ranking system – though noble in intent, produce unintended outcomes that perpetuate the inherited, two-tier education system. This system is marked by significant disparities in the education quality between lower and higher quintile schools. To substantiate this central argument, the study employs a two-fold theoretical framework – Nancy Fraser’s social justice theory to evaluate policy alignment with redistribution, recognition, and representation, and Higgs and Letseka’s critical theory to analyse policy failure. Through this lens, the study reveals the systemic and structural inequalities that perpetuate educational disparities and proposes context-sensitive solutions. The framework proves to be both abstract-specific and praxis-specific in its evaluation. The findings reveal that while policies such as the South African Schools Act (SASA, 1996) and the National Norms and Standards for School Funding (NNSSF, 1998, amended 2006) symbolically endorse social justice, they have largely failed to dismantle the inherited structurally divided education system. The analysis further identifies a persistent gap between redistributive aims and the provision of quality education in the school funding models evaluated from global, continental, regional, and local perspectives. In conclusion, this study argues for a comprehensive review of South Africa’s school funding policies to move beyond symbolic commitments and effectively address entrenched inequalities, aiming to realize genuine quality education for all.

Acknowledgements

Dr. Thokozani Mathebula, for broadening my horizons when it comes to research writing, the continuous support, guidance, everlasting knowledge and more importantly the patience he has shown throughout my phases of evolving as I compiled this Research Report.

Dr. Dominic Griffiths, whose initial supervision and feedback has contributed to the foundation that this research report is based on.

The National Research Foundation (NRF), that funded my Master of Education (Coursework and Research Report) studies.

My family, for continuing to remind me of the beautiful journey that I continue to walk and how this present journey adds to that in more rewarding ways.

Lastly, **God**, whose teaching found in the book of Matthew 17:20 has carried me in the writing of this research report. It reads “truly I tell you, if you have faith as small as a mustard seed, you can say to this mountain, ‘move from here to there,’ and it will move. Nothing will be impossible for you”.

TABLE OF CONTENTS

Contents

Declaration.....	1
Dedication.....	2
Abstract.....	3
Acknowledgements.....	4
Acronyms and Abbreviations.....	8
CHAPTER 1: RESEARCH OVERVIEW.....	9
1.1 Introduction.....	9
1.2 Problem Statement.....	9
1.3 Aim of the Study.....	10
1.4 Central Argument.....	10
1.4.1 Sub-claims.....	10
1.5 Methodology.....	12
1.6 Chapter Outline.....	14
1.7 Conclusion.....	14
CHAPTER 2: CONCEPTUAL CLARIFICATION OF THE KEY CONCEPTS – QUINTILE RANKING SYSTEM, QUALITY EDUCATION, POLICY, FUNDING MODEL AND SCHOOLS	16
2.1 Introduction.....	16
2.2 Policy: A Conceptual Clarification.....	16
2.2.1 Policy: As a Course of Action.....	16
2.3 Funding Model: A Conceptual Clarification.....	18
2.3.1 Funding Model: The Reinforcer of a Public Good and a Determinant of Who Gets What.....	18
2.4 Quintile Ranking System: A Conceptual Clarification.....	19
2.4.1 Quintile Ranking System: As a Redress Strategy Ensuring the Historical Correction Using the Poverty Ranking of Post-Apartheid South African Schools.....	20
2.5 Quality Education: A Clarification of the Concept.....	21
2.5.1 Quality Education: As Input-driven and Output-driven.....	21
2.6 School: A Conceptual Clarification.....	23
2.6.1 School: The Site for the Provision of Education and the Site which Determines the Influence that Education is Going to Have on Society.....	23
2.7 The Justification of the Use of the Key Concepts in This Study, Namely, the Quintile Ranking System, Quality Education, Policy, the Funding Model and Schools.....	25
2.8 Conclusion.....	27
CHAPTER 3: LITERATURE REVIEW–GLOBAL, CONTINENTAL AND REGIONAL TRENDS AND DEBATES	28
3.1 Introduction.....	28
3.2 Funding Policies, Quality Education: A Global Perspective (United Nations)	28
3.3 Funding Policies, Quality Education: A Continental Perspective (African Union)	32
3.4 Funding Policies, Quality Education: A Regional Perspective (Sub-Saharan Africa) 36	
3.5 Conclusion.....	38
CHAPTER 4: THE THEORIES UNDERPINNING THE THEORETICAL FRAMEWORK OF THIS STUDY	39
4.1 Introduction.....	39

4.2	The Double Lens: Social Justice Theory and Critical Theory in Dialogue.....	39
4.3	The Limits of the Double Lens: The Constraints that come with the Social Justice Theory and Critical Theory	41
4.4	Selecting the Double Lens: The Reason Why the Social Justice Theory and Critical Theory Matter in this Study.....	42
4.5	Bringing the Double Lens into Focus: How the Social Justice Theory and Critical Theory in Dialogue Shape this Study	43
4.6	Conclusion.....	48
CHAPTER 5: THE EVALUATION OF THE SCHOOL FUNDING POLICIES: THE SOUTH AFRICAN SCHOOLS ACT AND THE NATIONAL NORMS AND STANDARDS FOR SCHOOL FUNDING		50
5.1	Introduction	50
5.2	Framing the Right to Education: The Role of the South African Constitution.....	50
5.2.1.	A Justice Test: Evaluating the South African Constitution's (1996) Educational Commitments	51
5.2.2.	Theoretical Reflections on the South African Constitution's (1996) Education Commitments	52
5.3	Implementing the Constitutional Promise: A Look at the South African Schools Act (84 of 1996).....	54
5.3.1	The Role of the School Governing Bodies	55
5.3.2	School Funding Provisions	56
5.3.3	Evaluating the SASA (84 of 1996): Redistribution, Recognition and Representation in Focus.....	58
5.3.4	Theoretical Reflections on the Role of the South African Schools Act (84 of 1996) in Education Reform.....	59
5.4	Implementing the Constitutional Promise: A Look at the NNSSF.....	61
5.4.1	The Quintile Ranking System.....	61
5.4.2	The Per-Learner Allocation Model.....	62
5.4.3	The School Fees Policy	63
5.4.4	Evaluating the NNSSF: Redistribution, Recognition and Representation in Focus	65
5.4.5	Theoretical Reflections on the NNSSF.....	65
5.5	Conclusion.....	68
CHAPTER 6: OBSERVED DEFERMENT OF EDUCATIONAL JUSTICE: HOW POST-APARTHEID SOUTH AFRICAN FUNDING POLICIES MAINTAIN THE TWO-TIER EDUCATION SYSTEM		69
6.1	Introduction	69
6.2	The Right to Education Undermined: Constitutional Promise Unfulfilled in Education.....	69
6.3	Decentralisation or Disempowerment? Reassessing the South African Schools Act Justice Agenda.....	70
6.4	The NNSSF in Crisis: Funding Models That Sustain Inequality.....	72
6.4.1	The Per-Learner Allocation Model.....	73
6.4.2	The Fee-Paying Policy	74
6.4.3	The Fee-Exemption Policy.....	75
6.5	The Application of Critical Theory	76
6.6	Conclusion.....	78
CHAPTER 7: CONCLUSION		79
REFERENCES		84

Acronyms and Abbreviations

BEAM	Basic Education Assistance Module
CESA	Continental Education Strategy for Africa
CG	Capitation Grant
DBE	Department of Basic Education
EFA	Education for All
ETF	Education Transition Fund
FCUBE	Free and Compulsory Universal Basic Education
FSHS	Free Senior High School
FUNDEB	Fund for Maintenance and Development of the Basic Education and the Appreciation of Teaching
FUNDEF	Fund for Maintenance and Development of the Fundamental Education and the Valorisation of Teaching
GDP	Gross Domestic Product
NNSSF	National Norms and Standards for School Funding
NRF	National Research Foundation
SASA	South African Schools Act
SDC	School Development Committees
SDG	Sustainable Development Goals
SGB	School Governing Bodies
SMC	School Management Committees
SMT	School Management Teams
UNICEF	United Nations International Children's Education Fund

CHAPTER 1: RESEARCH OVERVIEW

1.1 Introduction

Globally, governments have committed to developing effective basic education funding models that do not perpetuate inequalities. This commitment is paramount because it directly influences the provision of quality education. In the regional context, Chikoko and Mthembu (2020) found that almost all sub-Saharan African countries share common traits regarding the way in which they have organised how to fund their public schools. The latter mentioned is seen through the existence of a shared responsibility of basic education funding between state funds and private funds. In the local context, the inherited disparities in the provision of quality education, which, are inherited by post-apartheid South Africa are evident. This has led to post-apartheid South African commitment to ensure that all public schools tasked with the provision of basic education are supported by an effective funding system. In line with this commitment, the NNSSF legislated for schools to be categorised into five groups which are known as quintiles. The categorisation of public schools into quintiles is an indicator of the ability of such schools to provide quality education. Against this backdrop, this research study set out to critique post-apartheid school funding policies to show how an unintended outcome of such policies in the South African school context counteracts social justice theory which holds that the first virtue of institutions is justice.

1.2 Problem Statement

The Constitution of the Republic of South Africa (1996) states that the government must provide funding for education to guarantee that learners' rights to an education are upheld. Post-apartheid school funding policies are part of the South African constitutional order and are indicative of the commitment of the democratic ideal to uphold the Constitution (1996). However, van der Berg et al. (2011) remind us that one of the legacies of apartheid that has proved itself to be resilient is the provision of poor-quality education within the historically disadvantaged parts of the school system. Given this, Chetty (2019) concurs by pointing out that a poor-quality education in disadvantaged schools perpetuates intergenerational cycles of poverty in working class communities. Therefore, the social problem, is that there is still a deeply entrenched divide where advantaged schools serve advantaged communities and disadvantaged schools serve disadvantaged communities. These are societal characteristics that remain despite post-apartheid South African government having committed itself to doing away with social injustice. According to Van Dyk & White (2019), the lack of quality education

offered by lower quintile schools constitutes a vast social injustice. This then sheds a light specifically on post-apartheid South African school funding policies as they are intended to do away with the existing social injustice. The research problem in this study is that in post-apartheid South African school funding policies there are levels of enablement for higher quintile schools and constraints for lower quintile schools to provide quality education. It is important to note that the latter goes against what Rawls (1971) points out which is that the opportunities in a just society “are to be distributed equally unless an unequal distribution ... is to everyone’s advantage” (p. 62). In this case, the resultant unequal opportunity provided to post-apartheid schools regarding the provision of quality education is not to everyone’s advantage as lower quintile schools continue to offer poor-quality education, while higher quintile schools continue to offer good quality education.

1.3 Aim of the Study

The aim of this study is to provide a critical analysis of the school funding policies in post-apartheid South Africa.

1.4 Central Argument

The uniform school funding policies – particularly the legislated quintile ranking system – though noble in intent, produce unintended outcomes that perpetuate the inherited, unequal two-tier education system, marked by significant disparities in the quality of education provided by schools in lower and higher quintiles in post-apartheid South Africa.

1.4.1 Sub-claims

- While the education department uses its funding models to fund schools based on socioeconomic status or background for the purposes of the provision of quality education, it tends to fail in supporting targeted¹ schools to deliver quality education.

¹ Consequently, there is a persistent reality whereby schools serving poorer communities struggle to provide quality education, whereas schools serving wealthy communities remain to prosper in providing quality education, revealing a crucial discrepancy between policy intentions and the actual realities of schools pertaining to the provision of quality education. This discrepancy entrenches the two-tier education system that sparked the introduction of education policies in the first place.

- The foundational² education policies found in the global and continental perspectives have influenced the national³ funding policies through their commitment to the right to quality education. However, persistent disparities exist in the provision of quality education among schools.
- The two-fold theoretical framework is used to critically analyse how educational policies, despite having made progress in identifying⁴ the inherited injustices experienced by historically marginalised schools, continue to face challenges⁵ in ensuring that the schools in the low socioeconomic communities are transformed⁶.
- The South African commitment to the right to education is observed in its Constitution (1996), SASA (84 of 1996), and the NNSSF (1998)⁷ later amended in (2006). However, my critical evaluation reveals that despite well-intended remedies, deeply entrenched injustices continue to persist in schools. This is observed through the persistence of a two-tier⁸ education system in the provision of quality education. It should be noted that I use the term the “NNSSF (1998) later amended in (2006)” here because what the 1998 version did was to lay the groundwork for the funding models: the quintile ranking system of schools, the per-learner allocation, the fee-paying policy and the fee-exemption policy. However, we see the detailed provisions of these funding models in the 2006 version. Moreover, the 2006 amended version of the NNSSF formally introduced the no-fee policy. However, for ease of reading, I simply refer to this as the NNSSF going forward.

² The Education for All (EFA) (2000) and Sustainable Development Goals (SDGs) (2015) found in the global perspective; and Continental Education Strategy for Africa (CESA) (16-25) found in the continental perspective.

³ Brazilian Fund for Maintenance and Development of the Fundamental Education and the Valorisation of Teaching (FUNDEF) (1996-2006) and later the Fund for Maintenance and Development of the Basic Education and the Appreciation of Teaching (FUNDEB) (2007-2020) representing a nation in the globe; the Ghanaian Free Senior High School (FSHS) (2017) and School Capitation Grant (CG) (2005) representing a nation in the continent of Africa; and the Zimbabwean Basic Education Assistance Module (BEAM) (2001) and the Education Transition Fund (ETF) (2009) representing a nation in the region of Sub-Saharan.

⁴ The ‘who’ of social justice which is all about who the bona fide subject of social justice is.

⁵ Critical theory representative of the ‘why’ behind the failure or success of the ‘what’ of social justice observed in the funding policies in place.

⁶ The ‘what’ of social justice is about social justice remedies – redistribution, recognition and representation regarding the provision of quality education by all schools.

⁷ The quintile ranking system of schools with its school funding allocation formula, the no-fee schools policy, the fee-exemption schools policy, and the fee-paying schools policy.

⁸ It reveals disparities between schools serving low socioeconomic communities and schools serving high socioeconomic communities in their provision of quality education.

I therefore call for a comprehensive review of the education policies and their resultant school funding models to ensure they move beyond their symbolic intentions to meaningfully addressing the deeply entrenched inequalities in education⁹.

1.5 Methodology

This research study employs a conceptual¹⁰ approach, supplemented by a philosophical¹¹ approach in selected aspects of this study, which I will unpack.. Conceptual analysis involves using progressive levels of abstraction, ranging from simple concepts to complex, difficult-to-define ideas. Van Der Waladt (2020, p. 2) notes that these complex abstractions “are typically referred to as constructs,” which are theory-laden and cannot be defined without a theoretical disposition. This approach is particularly appropriate for this study as it allows for the interrogation of key constructs – policy, funding models, the quintile ranking system, quality education, and schools – all of which present complexity and theory-dependent attributes. In Chapter 2, conceptual clarifications are provided. As Standish (2014) emphasises, establishing clear conceptual foundations is paramount for the literature review. Clarifying these key concepts ensures a strong foundation for the critical evaluation in Chapters 5 and 6. Botes’ (2002) observation that “the strength of the theories...is dependent on the quality of the concept analysis” (p. 23) underscores this link between conceptual clarity and theoretical strength. However, Botes (2022, p. 23) warns that conceptual analysis has limitations, risking vagueness and a lack of depth. Specifically, this type of research: (1) “lack(s) empirical... investigations to clarify the meaning of concepts”; (2) can use definitions lacking sufficient theoretical grounding; and (3) may rely too heavily on the researcher’s interpretations. Considering these

⁹ Eventually aiming to dismantle the persistent two-tier system in the provision of quality education.

¹⁰ Horsthemke (2021, p. 1) reminds us that “all research is at least partly conceptual: all research contains (or should contain) a literature review and embeds [or] locates empirical research within the pertinent theory or a theoretical framework.” Horsthemke (2021, p. 1) points out that “conceptual research proceeds only on theoretical level (even where it reports on empirical research conducted elsewhere) and works only with texts and ideas, and it usually involves a more extensive review of the literature on a particular (set of) concept(s)”. Therefore, this forms part of my methodology because my study engages solely with texts, theories and literature to critically evaluate post-apartheid school funding policies through a two-fold theoretical lens (involving social justice theory and critical theory).

¹¹ Dunkel (1953) asserts that educational research needs a basis or framework. Dunkel (1953, p. 28) further points out that “when this framework becomes adequately precise, fundamental, and comprehensive, it tends to become what accurately may be called philosophic.” Moreover, he reminds us that “in the present state of philosophy (and quite possibly in all future states of it) universal agreement on a single theoretical framework is impossible” (Dunkel, 1953, p. 28). In other words, we cannot escape the reality that philosophy naturally involves disagreements (Dunkel, 1953). Therefore, he asserts that a philosophical approach to research must focus on clarifying and sharpening fundamental disagreements (Dunkel, 1953). He further points out that “through this clarity, partial agreement would be strengthened for coherent work could then be done on the basis of particular fundamental views” (Dunkel, 1953, p. 28). This forms part of my methodology as it is characterised by the ensuring that I provide a coherent critical analysis grounded in educational theory.

limitations, this study ensures its conceptual definitions are rigorously grounded in theory, not merely reliant on my own interpretation.

Also in Chapter 3, a literature review is presented. This process aligns with the study's use of documentary research, a method involving the reflexive examination and interpretation of documents to uncover the social and structural realities they reflect. Denscombe (1998, p. 163, as cited in Ahmed, 2010, p. 2) notes that "government publications and official statistics would seem to be an attractive proposition for the social researcher." This is pertinent here, as the analysis of policy documents (e.g., the NNSSF, SASA) forms the evidentiary core for this chapter and the critical policy evaluation in Chapter 5. Furthermore, Atkinson and Coffey (1997, p. 55, as cited in Ahmed, 2010, p. 2) argue that documentary details "need to be situated within a theoretical frame of reference [so that their] content is understood." This highlights the essential interplay between the documentary analysis in Chapters 3 and 5 and the theoretical framework developed in Chapter 4 and applied in Chapter 6. Situating these documents within the frameworks of Fraserian social justice and critical theory ensures the analysis moves beyond description to critical interpretation.

Despite its strengths, documentary research faces critiques concerning its nature of evidence collection (Ahmed, 2010). Critics note that it may need to be supplemented by other methods, as documents are secondary sources containing material "not specifically gathered for the research question at hand" (Ahmed, 2010, p. 3). Moreover, the researcher's social, political, and economic standing can influence the selection and interpretation of evidence. Hence, Ahmed (2010, p. 9) asserts that "historical documents... are amenable to manipulation and selective influence." Acknowledging these critiques, this study treats documents not as neutral evidence but as social artefacts requiring critical interpretation within a theoretical framework. This theoretical integration, outlined in Chapter 4, is the primary strategy for mitigating these limitations and ensuring a robust analysis.

Chapter 4 develops the study's theoretical framework, which is paramount for the critical thinking, analysis, and synthesis of the research problem (Bruce, 1994). The theoretical foundations – social justice theory (Fraser) and critical theory (Higgs & Letseka) – provide the essential "theoretical disposition" needed to define the constructs from Chapter 2 and the "theoretical frame of reference" required to interpret the constructs defined in Chapter 2 and the documents analysed in Chapters 5. In Chapter 5, the method of critical analysis advocated by Bruce (1994) is adhered to, focusing the critique on the SASA, NNSSF and its associated

policies in relation to the provision of quality education. In Chapter 6, a strict philosophical research approach is followed, constructing an argument based on the evaluation in Chapter 5 while providing original ideas. This argument builds upon the conceptual foundation from Chapter 2, the documentary evidence from Chapter 3, and is guided by the theoretical lens from Chapter 4. Finally, Chapter 7 applies this theoretical lens to propose future directions, demonstrating the theory's practical application to the problem.

1.6 Chapter Outline

This introductory chapter sets out the general topic, problem statement, central argument, criteria and methodology. In Chapter 2, I introduce the clarification of the concepts that are representative of the picture of this research study, namely, policy, funding models, the quintile ranking system, quality education, and schools. In Chapter 3, I review literature pertaining to the education funding policies in the global, continental and regional perspective. In Chapter 4, I articulate the two-fold theoretical framework used in this research study which involves both social justice theory and critical theory. In Chapter 5, I evaluate the local perspective of the educational funding policies using the theoretical framework in Chapter 4. In Chapter 6 and 7, I propose directions for the future to achieve the intended outcomes of post-apartheid South African policies.

1.7 Conclusion

First, this chapter introduced the quintile ranking system in post-apartheid South Africa. Second, the study showed that the problem lies in the existence of a deeply divided education system. One part of the system benefits and is well-resourced, while the other is limited and disadvantaged. This situation is an unintended result of post-apartheid education policies. It goes against the principles of social justice, which state that only advantages that support the previously disadvantaged should be acceptable in post-apartheid South Africa. When the system continues to benefit those who were already advantaged, it highlights that the education system is unjust. Third, the study aim was explained which is to provide a critical analysis of the school funding policies in post-apartheid South Africa. Fourth, this chapter pointed out that the central argument is that the uniform school funding model in its noble form engenders the unjust differentiation of public schools instead of abolishing it. Last, it sketches the conceptual and the philosophical questions that will be used in this study. The next chapter focuses on the clarification of the key concepts to lay the ground for this study.

CHAPTER 2: CONCEPTUAL CLARIFICATION OF THE KEY CONCEPTS – QUINTILE RANKING SYSTEM, QUALITY EDUCATION, POLICY, FUNDING MODEL AND SCHOOLS

2.1 Introduction

Post-apartheid South African state has implemented policies to address historical funding inequalities between schools. Guided by social justice principles, these measures redistribute resources from previously advantaged to disadvantaged institutions. Given these policies, the implication of the redistribution of funding provided to schools should manifest in the transformation of schools, which enables schools to provide quality education. This chapter is divided into six sections: Section 1 of this chapter clarifies the key concept policy; Section 2 clarifies the key concept funding models; Section 3 clarifies the key concept quintile ranking system; Section 4 clarifies the key concept quality education; Section 5 clarifies the key concept schools. Lastly, Section 6 offers a justification for using these concepts to underpin this research report.

2.2 Policy: A Conceptual Clarification

According to Ball (2021), a policy is promulgated by the state to determine the direction and pace of the changes that are to take place in schools to achieve educational aims and objectives. Given this, policies are used to describe the process of governing “in a particular way, stressing order, and outcome and this makes the practice valid” (Colebatch, 2009, p. 19). In addition, Colebatch (2009) points out that policy is a way in which “government ... [accomplishes] known objectives, particularly the solution of social problems” (p. 10). Therefore, policy is a government’s explicit course of action that assists in solving or at least managing the identified problems (Colebatch, 2009). Taken together, the definitions of the policy as provided by Ball (2021) and Colebatch (2009) indicate that policy presents itself as an inescapable provision which must be followed to ensure that change does occur. However, policies often function as idealized visions that outline governmental intentions for addressing social disparities and prescribe courses of action intended to achieve those goals. Correspondingly, there is a single feature that comes from the concept policy which is ‘course of action’.

2.2.1 Policy: As a Course of Action

The gravity of the apartheid’s unjust differentiations in the provision of education at public schools which was racially determined resulted from the policies that supported its legislation.

The laws were based on race and favoured one group, which was unfair and undemocratic. Therefore, the laws had to be changed to allow the government to address the root causes of discrimination. The new laws aim to treat all people equally. If any differences are catered for, they should benefit the whole society. These legal changes are intended to remove harmful forms of inequality and promote fair treatment. The goal is to support social justice in post-apartheid South Africa, which informs the actions to be taken.

When considering the course of action that the law is meant to support – in this case, shifting from negative to positive differentiation – it is important that the policy includes clear guidelines. These guidelines should outline the steps to be taken to achieve that goal. The course of action appears as a prescription of what should take place to ensure a certain change, both in theory and ideology.

Theoretically, the legacy of apartheid created clear inequalities between disadvantaged and advantaged schools which continue to prevail in post-apartheid South Africa. This recognition motivated the state to develop a policy aimed at addressing these disparities. The policy includes specific conditions, stating that any decisions not aligned with its guidelines – especially regarding school funding – can be overruled. In practice, the policy is meant to ensure the fair redistribution of school funding, along with educational opportunities and resources. For instance, some schools receive increased funding due to the policy's pro-poor focus, which reflects the goals of post-apartheid South Africa.

Therefore, in this study, the clarification of the construct policy is important because it helps to explain the impact of the government's decisions on the funding of schools in post-apartheid South Africa. In this study, post-apartheid schools refer to no-fee and fee-paying schools. This clarification helps to show how these two types of schools, based on the quintile ranking system, are funded according to specific funding rules set out in policy documents. These rules influence their ability to provide quality education. The study also examines how policy is used as a tool to drive transformation in post-apartheid South African schools. This transformation can be evaluated by determining whether no-fee and fee-paying schools are no longer functioning in the same way as the previously disadvantaged and advantaged schools under apartheid.

2.3 Funding Model: A Conceptual Clarification

Gerrard et al. (2017) explain that government funding reflects what is considered important to the public. This means that when the government funds a public service, it shows that the service is a public concern rather than a private one. In the case of education, public funding is essential because it helps ensure equal opportunities for all, which benefits society. Gerrard et al. (2017) further remind us that “government funding decides, in the crudest of terms, ‘who gets what’, and is thus a fundamental articulation of the values of government” (p. 503). On the other hand, Makoelle and Burmistrova (2020) define a funding model as that which is used to pursue the discourse of fairness. Taken together, the definitions of the funding model as provided by Gerrard et al. (2017) and Makoelle and Burmistrova (2020), indicate that the funding model is a framework established to give schools a fair opportunity to provide quality education. Correspondingly, this definition presents two elements, ‘a public good’, and ‘who gets what.’

2.3.1 Funding Model: The Reinforcer of a Public Good and a Determinant of Who Gets What

It is important to note that in post-apartheid South Africa the unconditional right to education is endorsed because education is a public good. The reason for this, is that education was a key social construct instrumental in sustaining unequal access to educational opportunities for both disadvantaged and advantaged learners. Therefore, post-apartheid funding model is designed to ensure that education, as a public good, is supported through public funding. It helps determine who receives funding and why, based on the need to correct historical inequalities. The model aims to allocate the right amount of funds to both previously disadvantaged and previously advantaged schools. It is important to understand that the funding model reflects the government’s commitment to transforming the education system. By deciding ‘who gets what,’ the state shows its effort to improve education rights for previously disadvantaged groups through fair distribution of public-school funding. This means that education should improve for those identified by post-apartheid government as deserving of redistributed funding. By deciding who receives funding, along with educational resources and opportunities, the state aims to address the problem of inequality between schools as a broader issue in society.

Theoretically, this implies that the funding model facilitates a redistribution of funds from advantaged to disadvantaged schools. Consequently, advantaged schools must rely on charging school fees to generate revenue. Moreover, the funding model is designed to make sure that

previously disadvantaged groups are not excluded from accessing better education because of financial barriers, as they were in the past. Practically, this implies that the ideals of the funding model in post-apartheid South African schools must be adhered to by the relevant stakeholders in public schools for its success, namely, the School Governing Bodies (SGBs), educators, principals and parents. Therefore, stakeholders must actively support schools in providing quality education, either through government funding for disadvantaged schools or school fee collection by advantaged schools.

The concept of the funding model used in this study is based on the idea that education is a public good and should be supported by the state. It also considers who should receive this funding to deliver education fairly. This understanding of the funding model reflects how post-apartheid South Africa plans to use school funding to support the transformation of the education system. It also shows how the state has included the principles of social justice in the funding model by using positive discrimination. This means that funding is not distributed equally, but rather in a way that ensures all schools benefit – unlike the unfair distribution of funds during apartheid

2.4 Quintile Ranking System: A Conceptual Clarification

Aina and Bipath (2020) explain that schools are categorized into five groups under the quintile ranking system. This system forms the legal basis for school funding and is used to correct the historical inequalities in the provision of education in public schools. Moreover, Poisson (2014) provides us with two perspectives from which we can view the quintile ranking system. The first perspective is that the quintile ranking system is a mechanism used to rank schools based on poverty levels to ensure that recurrent expenditures are redistributed from the least poor schools to the poorest schools (Poisson, 2014). The second perspective is that the quintile ranking system is a redress strategy used to address national disparities (Poisson, 2014). Taken together, the definitions provided by Aina and Bipath (2020) and Poisson (2014), indicate that the quintile ranking system is a post-apartheid strategy designed to redress historical inequities. It does this by allocating funds to disadvantaged schools, which are identified through a specific grouping mechanism. Correspondingly, there are three features that come from the quintile ranking system which are the ‘historical correction’, ‘poverty ranking’, and ‘redress strategy’.

2.4.1 Quintile Ranking System: As a Redress Strategy Ensuring the Historical Correction Using the Poverty Ranking of Post-Apartheid South African Schools

The quintile ranking system is a redress strategy designed to transform public schools from their historically exclusive nature into inclusive institutions. It is important to understand that the unequal quality of education during apartheid was caused by unequal funding. Schools that were advantaged under apartheid received more funds, which allowed them to offer better education. In contrast, schools that were disadvantaged received less funding and were excluded from this improved education. To correct this historical inequality, the South African government introduced the quintile ranking system. This system aims to redistribute school funding by giving more support to previously disadvantaged schools and less to those that were previously advantaged. The goal is to ensure that all public schools, regardless of their past, can offer quality education. The quintile ranking is based on poverty levels, helping the government decide which schools need more funding. This approach contrasts with the apartheid system, where funding was based on race. By doing this, the government hopes to address past injustices and promote social justice through fairer education funding.

A theoretical example of the quintile ranking system is when schools are categorised into five groups which are known as quintiles as per required to correct historical inequality. Schools in quintiles 1, 2, and 3 are designated as “no-fee” schools and are not allowed to charge fees (White & van Dyk, 2019). Conversely, those in quintiles 4 and 5 are classified as “fee-paying” schools and may charge fees (White & van Dyk, 2019). Given this categorisation, schools in quintiles 1, 2, and 3 receive substantial state funding and do not require additional fees (White & van Dyk, 2019). In contrast, quintiles 4 and 5 receive minimal state funding and must supplement their finances by charging school fees (White & van Dyk, 2019). A practical example of the quintile ranking system can be seen in schools located in rural areas and townships. These schools mostly serve learners from previously disadvantaged backgrounds, whose families cannot afford to pay school fees. Through the quintile ranking system, these schools receive more government funding to help ensure that their learners have an equal opportunity to access quality education. On the other hand, schools in middle-class areas often serve learners from previously advantaged backgrounds, whose families can afford to pay school fees. These schools rely more on parental contributions, which allows the government to direct more funds to schools that need them the most.

In this study, the quintile ranking system is understood as a strategy for redress. It is used to address the educational inequalities inherited from apartheid, which are still visible in the difference between previously disadvantaged schools (now called no-fee schools) and previously advantaged schools (now fee-paying schools). This definition of the quintile ranking system helps to show the current state of schools in post-apartheid South Africa, which are expected to play a key role in providing quality education for social transformation. These schools can offer either good or poor-quality education, depending on their resources. By examining the current state of these schools, the study can assess the impact of government funding in helping previously disadvantaged schools improve the quality of education they offer. This assessment is important because it shows whether historical inequalities have been corrected and whether social justice is being achieved.

2.5 Quality Education: A Clarification of the Concept

According to Heneveld and Craig (1996), quality education is a “concept comprising both changes in the environment in which education takes place and detectable gains in learners’ knowledge, skills and values” (p. 13). This alludes to the popular way of looking at quality education which is a system that involves receiving inputs and delivering outputs. For example, inputs are the resources in a broad sense that are put into the education system and outputs are what comes out of the same education system. For this study, the inputs are the intended ideals of the funding policies, and the outputs are transformation and inclusion. To expand on Heneveld and Craig (1996), Kumar and Sarangapani (2004) use the concept quality education as involving “that which is desirable, better and of some superior value” (p. 17). This alludes to the fact that it is important to look more closely at the inputs, namely, the desirability that is mentioned by Kumar and Sarangapani (2004), to determine the detailed nature of the outputs because when the inputs are desirable the outputs are expected to be desirable too. Taken together, the definitions of quality education as provided by Heneveld and Craig (1996) and Kumar and Sarangapani (2004), indicate that quality education involves the effectiveness and efficiency of the educational processes and practices – that being the inputs; and what those educational processes and practices are for – that being achieving the outputs. Correspondingly, there are two features that come from quality education which are the ‘inputs’ and ‘outputs’.

2.5.1 Quality Education: As Input-driven and Output-driven

Quality education in post-apartheid South Africa is key to transforming public schools from the unequal system of the past – which excluded previously disadvantaged learners from

accessing better education – into a democratic system that promotes inclusion and equal access to quality education. Inputs and outputs, as indicators of quality education, reflect how society has changed and how it aims to be structured. This means that the resources provided to post-apartheid schools are meant to help achieve social justice, and this goal should be visible in the outcomes produced by the schools. The outputs should be in line with the envisioned social structure which is a transformed education system in which improved education is received on an equal basis. When it comes to inputs, post-apartheid school funding policies set out what schools should be provided with to ensure that they transform the education system from being exclusive to inclusive. However, the ideas in the policies must be put into action through specific processes to support the transformation of post-apartheid schools. It is not enough to simply provide resources (inputs), what matters is how these resources are used. When looking at the outcomes (outputs), we must consider both what has been given to schools and how it has been used. These outcomes help us understand what post-apartheid South African schools have achieved – for example, whether exclusion has been removed and whether learners now experience inclusion. When schools perform poorly in transformed and inclusive education, it raises questions about the provided resources and their utilization. Looking at the quality of education through outcomes helps us understand whether previously disadvantaged schools have improved, based on the support they have received in post-apartheid South Africa.

Theoretically, the concept of quality education as input-driven “implies that powers and responsibilities should be distributed among all stakeholders in the school in accordance with the law and that policies should be formulated after rigorous deliberations” (Mncube, 2009, p. 85). The policies and actions must be based on deliberate decisions. However, to ensure that the decisions are not arbitrary, the will of the majority should prevail while at the same time the rights of minorities are preserved and respected. Practically, the concept of quality education as input-driven implies that educational processes and practices need to be in place for the transformation of the education system to ensure inclusion in post-apartheid South Africa. Therefore, in practical terms, the inputs for quality education encompass democratic governance, shared decision-making, parental support, and educator quality.

Theoretically, an output-driven quality education relates to what the school achieves and indicates output indicators such as learners’ knowledge, skills and values. The poor performance by South African learners prompts further investigation into the factors contributing to educational outputs. Practically, the concept of quality education as output-driven implies that the effectiveness and efficiency of the educational processes must be

evident in the way in which both the position and experience of post-apartheid schools are improved. This means that the laws and policies put in place as part of the inputs are meant to make sure that education processes and practices are fair. As a result, the outcomes (outputs) should show that public schools have used the opportunities given to them to achieve greater inclusion in education.

Thus, the concept of quality education that will be used in this study refers to the desirability, effectiveness and efficiency of the inputs that will achieve the output of justice. The reason for this is that the definition of quality education used in this study is based on both inputs and outputs. This means that the resources and support provided (inputs) should lead to outcomes (outputs) that show the inputs were used effective and efficient. In this study, quality education is linked to the goal of transforming post-apartheid education system to achieve inclusion, which is reflected in the outputs. Therefore, it is important to use an input- and output-based understanding of quality education, as it helps to assess whether the processes and practices in fee-paying and no-fee schools are leading to the results that post-apartheid government aims for, namely, changing an unjust education system into a fair and inclusive one.

2.6 School: A Conceptual Clarification

Schools are institutions with a distinct role in modern societies, the role being to ensure that the young people are provided with education which in turn enable them to develop in ways that would not be open to them in their families and communities (Young, 2011). This situation leads us to a consideration of Hamm's (2003) institutional use of education. According to Hamm (1989, p. 32) "the schooling or institutional use of the term education straightforwardly represents a reference to a person's development as a result of influences from schools or other formal educational institutions". Taken together, the definitions of schools as provided by Young (2011) and Hamm (2003), indicate that schools are concerned with education that will in turn create societal identities depending on the type of geographies that the schools are interwoven in. Correspondingly, this definition presents two elements 'education', and 'influence.'

2.6.1 School: The Site for the Provision of Education and the Site which Determines the Influence that Education is Going to Have on Society

Schools hold a lot of weight given that they influence and are influenced by their geography and most importantly they are concerned with that which is a public good – the provision of

education. Schools, as institutions, exert significant influence on post-apartheid societies either perpetuating inherited inequalities through exclusion or transforming them through inclusion. The type of school inevitably shapes the quality of education it provides. Consequently, persistent injustices within the post-apartheid system degrade, rather than improve, educational outcomes. Schools are the sites where educational provision become equal or unequal. Equal provision of education across all schools is a key indicator of social justice. When education is provided unequally, it shows that social injustice is taking place. This matters because equal access to education influences society outside of schools by helping create fairness and equality. In return, a fair and equal society also supports equal education. On the other hand, unequal education leads to more inequality in society, and an unequal society continues to cause unequal education. Therefore, it is important to understand that social justice is linked to the desegregation of public schools, while social injustice is linked to ongoing segregation. This understanding helps explain the current state of post-apartheid schools.

Theoretically, schools are ideal institutions for dealing with the changing of external environments and preparing learners for the social realities they are going to form part of. Given the goal to transform post-apartheid South African education system through upholding inclusion and doing away with exclusion in schools, schools are sites used to represent that ideal to begin with. This is where we see that the influence of schools is therefore essential, as they play a fundamental role in shaping learners' development and preparing them for their future roles in society. Influence is deeply rooted in the ideal of schools and it is therefore used to ensure that change occurs in the external environments of the schools. In simple terms, because education takes place in schools, a person might say that the years they have spent in school did not do them any good, meaning they went to school, but it did not improve their life or experiences in society as they had hoped (Hamm, 2003). This example raises the question of whether their time in school and the education they received made a positive difference in their lives. This can be determined when considering whether the type of the school influenced the quality of education provided.

The concept of school that is used in this study is the one that involves the institutional use of education and the influences that come with it. It should be noted that post-apartheid South Africa seeks to transform education, and schools are where this change happens. Their critical task is to move from exclusive to inclusive education, ensuring that every learner can access education. This idea helps us understand the important role of schools in post-apartheid South Africa. Schools give us insight into how their type (such as fee-paying or no-fee schools) affects

the kind of education they offer, and why they offer that kind of education. It is important to note that schools are expected to help solve social problems. For this reason, this study looks at whether the education schools provide – and the impact it has – is helping to address the social challenges that post-apartheid South Africa is trying to overcome.

2.7 The Justification of the Use of the Key Concepts in This Study, Namely, the Quintile Ranking System, Quality Education, Policy, the Funding Model and Schools

Following the clarification of the key concepts used in this study, namely, policy, funding models, the quintile ranking system, quality education, and schools, it is essential to contextualise them for how they contribute to this study. Firstly, when considering the concept policy, it is clarified as a course of action. It is important to note that a policy established because of the enactment of a law prescribes what it is that post-apartheid schools should be doing for the purposes of doing away with the historical injustices inherited from the apartheid system. In other words, policy acts as a driving force because it includes clear, strict rules that must be followed. These rules serve as a model for the actions that need to happen, meaning that schools are required to follow them. This set course of action cannot be avoided. This is because post-apartheid education policies are designed to support the goal of social justice. As a result, these policies are treated like laws to make sure all schools in post-apartheid South Africa move towards achieving fairness and equality in education.

Secondly, the concept of the funding model refers to how the government decides what is considered a public good – in this case, the provision of quality education by all public schools to ensure that everyone is included. It also helps determine which schools should receive funding, based on the social justice goals of post-apartheid South Africa. However, it is important to understand that the funding model comes from the broader concept of policy. Laws underpin the policies and provide the overall direction for the education system, while the funding model is a more detailed part of those policies. It focuses specifically on how school funding should support the values of social justice outlined in post-apartheid education policies. Following the influence of the concept policy on the concept funding model, the funding model is evidence of post-apartheid state's recognition that education as a public good must be funded publicly to ensure that everyone is included in the provision of improved education. The funding model, shaped by the social justice mandate, is designed to correct the past inequality in how schools were funded. It aims to treat education as a public good by redistributing funds – giving more support to previously disadvantaged schools and less to previously advantaged

ones. This shift reflects a positive change, where those who once received more now receive less, and those who received less now receive more. This is the core of redistribution. However, the funding model still represents a set of ideals. Unlike policy, which outlines broad goals and legal requirements, the funding model focuses specifically on how school funding should work according to those goals. Yet, these funding ideals are still in the process of being fully implemented in schools. In other words, we are still waiting to see whether the funding model is truly being applied in practice to achieve the redistribution set out by policy.

Third, when considering the concept quintile ranking system, it is a redress strategy which aims to do away with inherited apartheid inequalities regarding the state funding received by schools. This is where the idea of correcting past inequalities becomes clear. The quintile ranking system uses poverty levels to decide how school funding should be shared fairly. This system is the result of the goals first set out in education policies, which led to the funding model. The quintile ranking system puts these goals into action by showing how funding is redistributed among schools in post-apartheid South Africa.

The poverty ranking creates two main types of schools: no-fee schools, which are mostly previously disadvantaged and receive more funding, and fee-paying schools, which are mostly previously advantaged and receive less state funding. These two types of schools help us understand how support is given and whether this support helps them provide quality education. It also helps us see whether the social justice goals of the ranking system are being achieved through equal access to quality education.

Lastly, the ideas presented in policy and the funding model – as well as how these ideas are applied through the quintile ranking system in post-apartheid public schools – have important effects. The concepts of quality education and schools are key to this study because they help us understand how these inputs can shape the transformation of post-apartheid schools. This transformation is important for creating schools where learners experience inclusion and fairness. When looking at the concept of schools, they are seen as places where education is formally provided. It is important to understand how the school environment affects the way education is delivered, and how the education provided by schools also affects the surrounding environment. This concept of schools is especially important when we think about quality education, because in this chapter, quality education is understood in terms of both inputs (what is provided to schools) and outputs (what schools achieve with those inputs). The input-driven characteristic points us to the state funding received by schools and the policies involved in

that state funding for the purposes of improving the provision of quality of education. Moreover, the output-driven characteristic points us to considering whether the inputs provided to schools and the effectiveness and efficiency of the processes and practices regarding the inputs are on par with ensuring the transformation of schools which is seen through the inclusion of learners – which are the outputs expected. Therefore, analysing schools and the concept of quality education highlights the importance of efficiency and effectiveness in the processes and practices of both no-fee and fee-paying schools, particularly concerning the opportunities created by school funding. They help us see how well the opportunities provided are supporting schools, and the extent to which the processes and practices are staying true to the goals of the policy, funding model, and quintile ranking system. This also helps us understand what or who should be held responsible when the goals of the policies are not being achieved in post-apartheid South African schools.

2.8 Conclusion

In this chapter, I clarified the key concepts that form part of this study, namely, policy, funding models, the quintile ranking system, quality education, and schools. The clarification of the key concepts above showed that for transformation to be said to have occurred, the change from a certain type of the education system should have taken place. The education system has shifted from one based on unfair differences to one that aims to create fair and positive changes, especially for previously disadvantaged schools. Therefore, it is important to examine whether this change has really happened. This helps us understand what is helping or holding back progress, and whether these factors are continuing inequality or creating positive change to support the transformation of post-apartheid education system.

CHAPTER 3: LITERATURE REVIEW–GLOBAL, CONTINENTAL AND REGIONAL TRENDS AND DEBATES

3.1 Introduction

In this Chapter, I engage in a literature review on the school funding policies aimed at improving the provision of quality education from a global, continental and regional perspective. In the first section of this chapter, there is a review of the global policies which advocate for the importance of school funding policies that are aimed at the provision of quality education worldwide. In the second section of this chapter, there is a review of the funding policies in the continental perspective where we see the strategies envisioned for the African Union regions. Lastly, in the third section of this chapter, we see the funding policies put in place as per the United Nations and African Union strategies for the pursuit of quality education in the sub-Saharan countries. This chapter shows how schools in the sub-Saharan countries have since benefitted from the global policy instruments which advocate for the importance of quality education and therefore the need to fund schools to achieve the provision of quality education.

3.2 Funding Policies, Quality Education: A Global Perspective (United Nations)

The first policy to be considered in this section is the Education for All policy (EFA) (2000) which was introduced to the world when its launch took place at World Conference in 1990 (Madani, 2019). It is thereby necessary here to clarify exactly what purpose the EFA policy seeks to serve – it serves as a universal commitment towards the provision of quality education for children, youth, and adults (Madani, 2019). This purpose is realized through the EFA goals established at Jomtien (Thailand) in 1990 (Madani, 2019). Madani (2019, p. 100) reminds us that the EFA was launched in Jomtien (Thailand) “where more than 150 governments adopted world declaration on EFA policy and committed to support the universal right for education by achieving free quality education access”. Alexander (2008) makes us aware of the fact that following the 1990 Jomtien World Declaration on EFA, there have been four broad shifts of focus at the international level that the EFA debate has centred on. However, only two of those shifts in focus carry a lot of weight regarding quality education that the EFA (2000) has a relationship with, therefore, the two broad shifts are noted as follow:

“(a) from a preoccupation with school access, enrolment and retention – the sine qua non of EFA – to a concern for educational outcomes and quality; or from getting

children into school to addressing what they learn and how; (b) from treating equity and quality as separate to recognising that they are sides of the same coin, in that education for all cannot reasonably mean quality for only some” (Tikly & Barrett, 2011, p. 5).

Another focus of the EFA (2000) – which is school funding – is evidenced in Madani (2019) reminding us of the existing narrowing of EFA (2000) funding to countries with cooperative governments. According to Madani (2019), the latter is required for the purposes of ensuring the success of educational progress implementation. It should be noted that one cannot talk about EFA without considering the quality and funding of education. The latter is indicated by Munene (2021) in saying that “the World Conference on Education for All was a deliberate statement of intent to arrest the decline and stimulate enrolment, increase funding and advocate basic education in the face of competing national priorities” (p. 10).

The EFA reveals that it upholds the principle of quality education for all by introducing a globally shared ambition to ensure that the provision of quality education is a reality. However, the implementation of its aims has revealed an existing tension between intended purposes and unintended purposes of a policy. While the education policy plays a pivotal role in ensuring that the global education agenda recognises the imperative nature of both access and quality education, its ambitions have not been translated into the reality of all schools – particularly in sub-Saharan Africa. However, one important role it has played is moving beyond simply giving learners access to education, to also making sure that this access comes with quality education. This has been one of its goals, and in many ways, it has become a reality, as national plans now aim to provide both access and quality. However, some policies face challenges when it comes to putting these goals into action. Moreover, the EFA emphasis on providing funding to countries based on government cooperation presents risks of hindering its reach to all countries, thereby excluding historically marginalised countries that are unable to cooperate due to their socioeconomic status. Low and middle socioeconomic countries may seem to be uncooperative due to their inability to bear the costs of cooperating with the EFA requirements. While the EFA plays an important role in laying the groundwork for quality education to be recognised as a right and not a privilege, its funding models and observed reliance on international donors have limited its ability to tackle the entrenched structural inequalities in all countries. Therefore, while the EFA did an excellent job at igniting the global movement to achieve quality education in schools, it has not been implemented fully in all countries and remains as an ambitious ideal.

The second policy to be considered in this section is the Sustainable Development Goals (SDGs). Griffiths (2021) reminds us that the “SDGs were launched by the United Nations in 2015, setting out 17 inter-related development goals, accompanied by 169 specific targets” (p. 73). With respect to education the consideration of the SDG 4 is emphasised in this section. The SDG 4 reflects a new direction, clearly moving beyond the Millenium Development Goal of ensuring the achievement of the universal primary school education. SDG 4 moves beyond previous frameworks by advancing an agenda for “universal pre-, primary and secondary schooling for children, and expanded adult education, with a focus on educational quality, on learning, inclusion and equity” (United Nations, 2015, p. 17). It is important to note that SDG 4 is specifically included in this section because, as stated, it “comprises seven targets that deal with quality education and equality for different phases of education” (Unterhalter, 2019, p. 39). This shows the goal’s clear focus on promoting both quality and equality across all levels of education.

The SDGs have transformed the global vision of education by expanding its focus from primary schooling to all educational levels, thereby promoting inclusivity and quality education. However, while SDG4’s intention to ensure inclusive and quality education is a commendable progression, its translation into practice – particularly in schools within low and middle-income contexts – remains a challenge. The SDG uses a language that upholds the quality of education and the equal provision of this quality education. However, the reality in many countries is the persistent gap that exists between schools in their ability to provide quality education – whereby there exists a profoundly unequal provision of quality education. Although the SDGs aim for broader educational targets, they risk over-promising. Without context-specific measures to address historical structural inequalities, their goals of inclusion, quality, and equity remain obstructed for many schools. Therefore, the SDGs mirror a pattern of both progress and challenge: they represent an important shift in educational priorities but fall short of ensuring equal provision of quality education is a reality for all countries.

The Brazilian policies are considered in this section because Brazil gives us an example of how the policies are functioning given the provisions of the EFA (2000) and the SDGs (2015). The Fund for Maintenance and Development of the Fundamental Education and the Valorisation of Teaching (FUNDEF) (1996-2006) is a Brazilian education reform that was implemented in 1998. Gordon and Vegas (2005, p. 2) point out that the FUNDEF:

“Consists of the creation of a fund for each state, to which state and municipal governments contribute a proportion of their tax revenues; these revenues are then redistributed to the state and the municipal governments in each state on the basis of the number of students enrolled in their respective basic education system.”

The FUNDEF achieved its intended purpose to increase access to quality education particularly in poorer areas of Brazil in three years after its implementation (Gordon & Vegas, 2005). Moreover, the FUNDEF is an education reform aimed at addressing the spending inequalities in state education. An additional aspect that comes with the FUNDEF involves the fact that “the federal government supplements the per student allocation in states where the FUNDEF revenues per student are below a yearly established spending floor, promoting adequacy across all states” (Gordon & Vegas, 2005, p. 6).

Additionally, the Fund for Maintenance and Development of the Basic Education and the Appreciation of Teaching (FUNDEB, 2007-2020) represent a significant advancement upon its predecessor, FUNDEF, within Brazil’s education reform landscape. The FUNDEB involves a greater projection and scope compared to the FUNDEF because it covers all basic education and modalities which were treated as secondary. Dourado and de Araújo (2022) remind us that “FUNDEB, FUNDEF’s successor, in addition to (a) covering all basic education, its stages, and modalities, (b) added more taxes to the FUNDEB basket (IPVA, ITCMD, and ITR), with an increase in the percentage collected (from 15% to 20%) and, also, (c) set at least 10% of the total amount to complement the Union, constitutionalising this minimum obligation” (p. 5).

While the Brazilian policies are examples of the implementation of the SDG at the national level, the FUNDEF and the FUNDEB present with a complex reality. While these two education policies and their funding models have made progress by helping to redistribute school funding based on the economic background of schools – leading to better access to education for learners from poor communities – they have also not fully succeeded. They have not managed to ensure that all learners, whether from low- or high-income communities, receive the same quality of education, especially when they attend schools in areas that match their economic background. The failure is evidenced¹² by persistent racial disparities in educational quality, wherein white learners receive a good education, and black learners receive

¹² “After more than 15 years after the creation of Fundeb and almost three decades since the implementation of Fundef, we do not see equity between learning levels of white and black students in the country, but we identify a persisting racial inequality scenario that the allocation of resources implemented by the fund policies was not able to reverse” (Gomes, Gomes & Capixaba-Brasil, 2022, p. 14).

poor one. This shows that there is an entrenched issue: school funding alone, if not paired with targeted measures to address the legacies of structural and racial inequalities pertaining to the ability of schools to provide quality education, cannot transform the Brazilian education system. Moreover, the absence of these necessary measures shows that current Brazilian education policies undermine the central mandate of the EFA (2000), which is to ensure that access goes together with quality education and to eliminate the risk of a socially stratified system.

3.3 Funding Policies, Quality Education: A Continental Perspective (African Union)

The first policy to be considered in this section is the African Union's Continental Education Strategy for Africa (CESA) (16-25). According to Emmanuel (2019, p. 1) "the CESA (16-25) was adopted by the African Union Heads of State and Government at their Twenty-Sixth Ordinary Session on 31st January 2016 in Addis Ababa as the framework for transforming education and training systems in Africa". The existence of the strategic framework known as Agenda 2063 whose pace and plan of action spans 50 years in the quest to transform the African continent is responsible for the existence of the CESA (Emmanuel, 2019). Moreover, the reason for the creation of CESA is based on the understanding that education is a key tool for achieving the goals of Agenda 2063 (Emmanuel, 2019). CESA was therefore developed to help improve the education system so that it can support the goals set out in Agenda 2063 for the African continent (Emmanuel, 2019).

According to Emmanuel (2019, p. 1) "the CESA (2016 -2025) as an initiative by the African Union holds a lot of potential in the prospective transformation of education in Africa". Moreover, the CESA has ambitious characteristics regarding upholding Africa's dream about achieving educational development in the continent. Emmanuel (2019) reminds us that what is found when considering the CESA and its content is that Africa is dedicated in ensuring that it contributes to the global Education 2030 programmes. Moreover, the CESA "constitutes Africa's implementation framework for the United Nation's Sustainable Development Goal number four (SDG 4) on ensuring inclusive and quality education for all" (Emmanuel, 2019, p. 2). This shows that CESA supports and works alongside SDG 4, which strongly promotes fair and quality education. This is a positive feature of CESA and makes it a useful strategy to consider in this research report.

The Ghanaian policies are considered in this section because the country of Ghana gives us a representation of how the policies in the continent of Africa are functioning given the

provisions of the EFA (2000), the SDGs (2015) and the CESA (16-25). Therefore, the first Ghanaian policy that will be considered in this section is the Free and Compulsory Universal Basic Education (FCUBE) (1995). The FCUBE was implemented with a constitutional mandate whereby it is included in section 38, sub-section 2 of Chapter 6 of the 1992 Republican Constitution. The constitutional mandate states that “the Government shall, within two years after Parliament first meets, after the coming into force of this Constitution, draw up a programme for implementation within the following ten years, for the provision of Free, Compulsory and Universal Basic Education to all Ghanaian children of school-going age” (Government of Ghana [GoG], 1992). Ghana introduced the FCUBE in 1995 which contains its promise of universal education by 2005 (Dwomoh et al., 2022). The 1987¹³ Ghanaian educational reforms are behind what informs the structures in the FCUBE in its commitment towards restructuring the education system.

The FCUBE education policy built on previous efforts of the Ghanaian government other than starting anew. This is because it responds to persistent historical issues involving the failure of education transformation policies. The failure of the 1974 Ghanaian reform efforts led to increasing public dissatisfaction. This dissatisfaction culminated in an outcry against a system that provided quality education only for some, thus evidencing persistent inequalities in the Ghanaian education system. This background is important because it shows that FCUBE was implemented to rescue the education system that was already struggling to provide all learners with quality education. Moreover, it shows that the FCUBE was intended as a corrective rather than a transformative education policy. Its intended purposes promised that by the year 2005, the universal education in the Ghanaian context would be achieved. However, no indication exists that this universal education promise led to the provision of quality education for all schools. This shows that increased access alone does not directly address the unequal provision of quality education observed in low socioeconomic schools and high socioeconomic schools. In other words, access without quality education does not fulfil the commitment to the right to education as the EFA policy requires.

¹³ “... the decision to embark on the 1987 educational reform stemmed from two main reasons. First, there was public outcry about the quality of the existing educational system because the policy recommendations under the 1974 education reform had not been fully implemented. There were visible inequalities in the provision of education between the rural areas and the urban [centres]. Accordingly, the ... public saw the need for an educational reform as a national emergency. Secondly, the PNDC government saw the inherited educational system as inadequate for its transformative developmental agenda” (Boakye, 2019, p. 108).

The Ghanaian education policy that is considered in this section is the school Capitation Grant (CG) (2005). To address financial barriers and high out-of-school rates caused by school fees, the GoG implemented the Capitation Grant (CG) in 2005 with the aim of providing universal primary education (Mohammed & Apiung, 2025). Moreover, Mohammed and Apiung (2025) remind us that the school CG (2005) was “to absorb the user fees parents were asked to pay and to also address other challenges the FCUBE policy could not” (p. 4). The CG aimed to remove the persisting financial barriers to education, to address the high out-of-school rates or the low-enrolment figures in the previously disadvantaged districts in Ghana (Mohammed & Apiung, 2025). Mohammed and Apiung (2025) further expand that in broad terms “the goals of the policy are: (a) eliminate financial barriers that prevent children from poor households from enrolling in schools and (b) assist school administrators in focusing on school performance improvements” (p. 4).

Before the school Capitation Grant (CG) was introduced, poor households faced high education costs such as school fees and levies, which discouraged them from sending their children to school (Mohammed & Apiung, 2025). This shows that the CG (2005) aimed to reduce the financial barriers to education in Ghana and address the ongoing problem where wealth influenced access to education (Mohammed & Apiung, 2025). In its early years, Akyeampong (2009) supported the policy, saying it was a step in the right direction by trying to fix and improve on some of the mistakes made by the earlier FCUBE (1995) policy. Moreover, “increasing the amount of capitation and targeting the poorest and most disadvantaged groups would seem more likely to offset the opportunity costs of schooling for these groups and improve demand” (Akyeampong, 2009, p. 193).

Given the ongoing wealth gap in access to quality education, the CG aims to create a fairer system by making sure that children from poor households and rural areas have the same opportunity to attend school as those from wealthier families (Mohammed & Apiung, 2025). An important feature of the CG is its decentralised approach. This means that the management of the grant was handed over to School Management Teams (SMTs), giving schools more control over how the funds are used (Mohammed & Apiung, 2025). It needs to be emphasised that “the SMTs are made up of head teacher, school accountant, second head teacher, academic master/mistress, discipline master/mistress, guidance and counselling officer, and school management and projects master/mistress” (Mohammed & Apiung, 2025, p. 5). The SMTs’ responsibility is to manage the CG using “the preparation of development plans, budget

preparation, quality assurance of school projects, and preparation of reports on the utilisation of bank accounts” (Mohammed & Apiung, 2025, p. 5).

While the CG education policy was introduced by the Ghanaian government as a direct corrective measure aimed at addressing the resultant limitations of the FCUBE, it is only a partial solution to the persisting issue of access and quality education in Ghana. Even though the CG helps to reduce the economic barriers that the FCUBE policy could not fully remove, it still does not completely fix the problem of unequal access to quality education. Simply removing school fees is not enough to deal with the deep-rooted inequality in education. In addition, giving management responsibility to SMTs can lead to new challenges. This is because SMTs in poorer communities often have fewer resources and less capacity compared to those in wealthier areas. As a result, the differences between SMTs reflect the existing economic inequalities in Ghana’s education system. The reason for this is because the SMTs consist of members that are from the same low socioeconomic communities and high socioeconomic communities that the schools are located in. Therefore, the ability of the SMTs to manage the CG is impacted by socioeconomic status which in turn plays a significant role in their ability to provide quality education. Based on this, the main goal of the CG – to improve the education system by providing quality education – may not be fully achieved in all schools and communities.

The Ghanaian education policy that is considered in this section is the Free Senior High School (FSHS) (2017). Because many families in Ghana continued to struggle to afford school fees due to the cost-sharing system between parents or guardians and the government, many children who finished primary school could not go on to senior high school. As a result, the Ghanaian government introduced the FSHS policy in 2017 to solve this problem (Chanimbe & Dankwah, 2021). This is in line with the fact that Ghana falls under some of the African countries that spend a higher percentage of their total budget and Gross Domestic Product (GDP) on education (Adu-Ababio & Osei, 2018). Adu-Ababio and Osei (2018) remind us that “with an allocation of over 6 percent of GDP, Ghana’s spending on education is among the highest in Africa comparing a global average of 5 per cent” (p. 3). To further note Ghana’s dedication towards financing their country’s education, there was a significant increase of 10 percent in the allocation of education funds in 2017 compared to the amount apportioned in 2016 (Adu-Ababio & Osei, 2018).

Adu-Ababio and Osei (2018) note that while increased spending on education is a normal trend, one prime policy that necessitated this increment was the FSHS policy, “which represented about 5 per cent of government’s contribution to funding of the education sector budget” (p. 3). Considering that the Ghanaian government implemented the FSHS in 2017, it is worth noting that the government bears the burden of funding senior high schools as its full responsibility (Dzikunu & Ansah, 2023). To fulfil this responsibility, the Ghanaian government sources the funding of most of the educational resources through the GoG fund, Scholarship Secretariat, and Northern Scholarship Scheme (Dzikunu & Ansah, 2023). The policy aims “to improve quality through the provision of core textbooks and supplementary readers, teacher rationalisation, and deployment” (Free SHS Secretariat, n.d.). Moreover, the beneficiaries of the policy are not required to pay school fees and associated school operational fees (Dwomoh et al., 2022).

The FSHS education policy reveals that while its intended purpose is to address the economic barriers to education at the secondary level, it fails at addressing the challenges pertaining to the provision of quality education in the Ghanaian education system. Similar to the FCUBE and CG education policies, the FSHS is committed to ensuring universal access through addressing economic barriers to education. However, the FCUBE and CG education policies have already shown us that the removal of economic barriers to education does not automatically guarantee provision of quality education by both the low socioeconomic and high socioeconomic schools. Similar to the FCUBE and CG, the FSHS does not meet the requirements of the EFA policy (2000) mandate pertaining to the fact that increased access must go together with the provision of quality education.

3.4 Funding Policies, Quality Education: A Regional Perspective (Sub-Saharan Africa)

In this section, the Zimbabwean policies are considered as Zimbabwe is representative of the trends and debates on education funding in the sub-Saharan region. Therefore, the first Zimbabwean policy that is considered in this section is the Basic Education Assistance Module (BEAM) (2001) which is a basic education fund that is funded by the Zimbabwean government. Its intended aims are to pay fees for orphans and other vulnerable children (Chikoko & Mthembu, 2020). It is important to note that the Zimbabwean government took a pro-poor funding stance that is targeted at the previously disadvantaged communities when introducing the BEAM (Ringson, 2020). The BEAM was introduced by the Zimbabwean government in 2001 as a poverty alleviation measure. As Ringson (2020, p. 2) notes, it functioned as a “school

fee, examination fees, levies and building assistance programme” that was initially supported by the World Bank. The implementation scope which the BEAM covers in Zimbabwe is all 61 districts in the country, targeting both the urban and rural districts (Ringson, 2020). Moreover, when it comes to the recipient scope, the BEAM targets “vulnerable children aged between 6 and 19 years who are in school but unable to pay school fees, as well as vulnerable children who have dropped out of school or who have never attended school” (Ringson, 2020, p. 2). Thus, the objective of the BEAM is to ensure access to education.

The BEAM progressively ensures access for vulnerable learners. However, it reveals a narrow understanding of what the right to education encompasses, which is both access and quality education. While its nationwide reach and pro-poor mandate is a progressive step, it proves to be a reactive measure put in place to address poverty as an external barrier rather than addressing the entrenched structural inequalities in the education system. Similar to education policies in the sub-Saharan countries, the BEAM aims at redistributing resources to low socioeconomic communities, but it does not address the historical structural inequalities that perpetuate the deeply stratified education system. Moreover, the BEAM does not include plans for ensuring quality education, which creates a risk of offering access to education without ensuring its quality.

The second Zimbabwean policy that is considered in this section is the Education Transition Fund (ETF) (2009) which is a multi-donor rescue package aimed at the Zimbabwean education sector (Chikohomero, 2019). The ETF was launched by Zimbabwe’s Ministry of Primary and Secondary Education in 2009 (Boonstoppel & Chikohomero, 2011). Chikohomero (2019) reminds us that the ETF is “a result of the government engagement with donors, but most specifically it was a by-product of the donor’s faith in the new Minister’s sincerity and capacity to deliver and use resources in an accountable manner” (p. 40). The faith of the donors is evident in their support, which is managed by UNICEF. This funding allows the ETF (2009) to provide “teaching and learning materials for all schools, with more emphasis on science subjects at secondary school level” (Kadziya & Ndebele, 2020, p. 113).

Due to the need for effective management of resources in Zimbabwe's education system, the Education Transition Fund (ETF) supported the strengthening of the School Development Committees (SDCs) (Kadziya & Ndebele, 2020). Kadziya and Ndebele (2020) further explain that the SDCs reinforcement programme was led by SNV Netherlands Development Organisation in close partnership with Zimbabwe’s Ministry of Education. The “programme is

aimed at improving the quality of education in schools through reinforcing the SDCs' capacity and increasing parental participation in the management of schools" (Kadziya & Ndebele, 2020, p. 113)

The ETF is representative of the national education policies that have been established to address the crisis in the education system without really transforming the education system. While its reliance on donors to provide schools with necessary resources assisted Zimbabwean schools with the shortage of school resource, it only addressed short term issues while overlooking the entrenched historical inequalities. Moreover, the BEAM included efforts to strengthen the SDCs to help improve quality education in Zimbabwe. However, it lacked the needed support and resources for the SDCs to have a lasting effect. This shows that the Zimbabwean government has a weak commitment to solving long-term problems in its education system.

3.5 Conclusion

In this chapter, I reviewed the literature on school funding policies aimed at improving the provision of quality education from a global, continental and regional perspective. The literature review showed that there is a gap in funding policies, as they do not fully combine the goals of redistributing resources and providing quality education. This gap between school funding and the delivery of quality education is important to examine, as it helps reveal what supports or limits progress – and whether these policies are continuing to worsen inequality.

CHAPTER 4: THE THEORIES UNDERPINNING THE THEORETICAL FRAMEWORK OF THIS STUDY

4.1 Introduction

This chapter establishes the theoretical framework guiding the analysis, which is grounded in Nancy Fraser's social justice theory and Higgs and Letseka's critical theory. The first section explores the influences that shape this framework, drawn from these two theoretical traditions. The second section discusses the limitations of their foundational ideas. The third section justifies the selection of this combined framework, and the fourth explains its application in this study. The overall aim is to adopt a robust theoretical lens for evaluating post-apartheid South African school funding policies.

4.2 The Double Lens: Social Justice Theory and Critical Theory in Dialogue

Fraser (2007) defines social justice as "social arrangements that permit all to participate as peers in social life" (p. 27). Central to Fraser's (2007) conception of social justice is the principle of participatory parity. This principle requires dismantling institutionalized obstacles that prevent people from participating as peers in social life (Fraser, 2007). Fraser (2008) further distinguishes between two conceptual images of the scales of justice, referred to as the 'who' of justice and the 'what' of justice. The 'who' of justice directs our attention to the three dimensions of social justice – economic¹⁴, cultural¹⁵ and political¹⁶. In contrast, the 'what' of justice addresses the three remedies of social justice: redistribution, recognition and representation (Fraser, 2008). It should be noted that the redistribution remedy for injustice involves economic restructuring¹⁷ of some sort, the recognition remedy for injustice involves cultural or symbolic¹⁸ change and the representation remedy for injustice involves political¹⁹

¹⁴ Fraser (2008) points out that the economic dimension is rooted in political economy where the injustice associated with it is maldistribution or class inequality.

¹⁵ Fraser (2008) points out that the cultural dimension is rooted in the status order where the injustice associated with it is misrecognition or status hierarchy.

¹⁶ Fraser (2008) points out that the political dimension is rooted in the political constitution of the society where the injustice is associated with it is misrepresentation or political voicelessness.

¹⁷ Fraser (2008, p. 13) points out that this means "redistributing income and/or wealth, reorganizing the division of labour, changing the structure of property of ownership, democratizing the procedures by which investment decisions are made, or transforming other basic economic structures".

¹⁸ Fraser (2008, p. 13) points out that this means "upwardly revaluing disrespected identities and the cultural products of maligned groups; recognizing and positively valorising cultural diversity; or transforming wholesale societal patterns of representation, interpretation, and communication in ways that would change everyone's social identity".

¹⁹ Fraser (2008, p. 13) points out that this means "establishing democratic decision rules and procedures that are fair to all social actors" and ensuring "the inclusion of all affected in public deliberation and decision-making."

change. Together, these aspects provide a structured foundation for analysing the nature of injustice and the means through which it can be redressed, forming a critical part of the theoretical framework used in this study.

Expanding on social justice theory, this research uses critical theory to deepen the analysis of how inherited apartheid legacies perpetuate inequality and injustice within the education system. According to Higgs and Letseka (2021) critical theory “is a philosophy that is critical of the prevailing dominant view of society on social, political, economic and educational issues” (p. 90). It is thus necessary to explain what being critical involves, which means giving thought not to “the how or how-to of action, but with the why, the reasons for and consequences of what we do” (Mezirow, 1990, p. 8). This becomes important when we consider the main idea of critical theory, which explains that what we often see in human societies are deep problems or harmful conditions. To truly understand these problems, it is necessary to fully understand their root causes. Higgs and Letseka (2021) explain that these “causes are to be found in a society’s ideology, religion, economics, culture and language (e.g., in its language of instruction, command and morality)” (p. 89).

Additionally, Welton (1995) asserts that what is mostly highlighted when considering critical theory is the “dissatisfactions” (p. 13) emanating from social structures and more importantly it ensures that it lays the groundwork for emancipation. Welton (1995, p. 14) further asserts that critical theory is a “theory of history and society driven by a passionate commitment to understand how ideological systems and societal structures hinder and impede the fullest development of humankind’s collective potential to be self-reflective and self-determining historical actors” (p. 14). Given this, it is important to understand that critical theory is strongly linked to the belief that social sciences and theory should play a major role in bringing about change in societies. This is seen in how they aim to offer knowledge and tools that help the oppressed take part in struggles for freedom and justice.

Brincat (2012) points out that methodologically, critical theory needs tools that “are capable not only of understanding the conditions of human emancipation but in promoting them” (p. 227 - 228). Therefore, a claim made by critical theory is that it observes democracy as an illusion – in other words, “the real decisions that propel society are made by select and dominant groups of people who work behind the scenes” (Higgs & Letseka, 2021, p. 92). In more specific terms, critical theory that involves democracy is not only set on ensuring that it identifies oppressive forces in the society and contemplating action to be taken in counteracting

them, but also on ensuring that the people in the society hold the competencies to recognise and oppose such forces.

4.3 The Limits of the Double Lens: The Constraints that come with the Social Justice Theory and Critical Theory

To begin with, considering the social justice part of this research report's theoretical framework, it should be noted that it has its limitations which will be addressed in this section. The limitation pertains to Fraser's (2008) separation of the three dimensions of social justice, namely, recognition, redistribution and representation. Fraser treats her social justice three key concepts as distinct and interconnected at the same time; with social justice comprising of (a) an economic dimension, rooted in political economy, whose associated injustice is maldistribution or class inequality; (b) a cultural dimension, rooted in the status order, whose associated injustice is misrecognition or status hierarchy; and (c) the political dimension, rooted in the political constitution of society, whose associated injustice is misrepresentation or political voicelessness (Fraser, 2008, p. 403). However, separating these three dimensions of social justice risks weakening understanding that these three dimensions are deeply interconnected which in turn might distort the analysis or evaluation of that reality. Therefore, it is important to note that the limitations within the three dimensions of social justice theory help this study remain aware – especially during analysis and evaluation – of the risk of presenting a fragmented view of post-apartheid South African school funding model. This awareness will be shown by highlighting the connections between the key concepts of social justice theory, demonstrating that different forms of social injustice are often interconnected in any society.

Lastly, it is important to note that the critical theory aspect of the theoretical framework used in this study allows for a deeper exploration of the ongoing systemic inequalities found in post-apartheid South Africa's education funding policies. However, it is also important to recognize that this critical theory approach has its limitations, especially when viewed within the specific context of this study. To begin with, a limitation is evidenced because aspects such as ideology and power structures tend to be overemphasised. These aspects play a significant role in ensuring that historical and systemic inequalities in post-apartheid South African school funding system are understood. However, their overemphasis may mask any positive practical solutions that post-apartheid South African school funding system offers. Moreover, critical theory often focuses on the dominant structures in society, their root causes, and the idea that

democracy can be misleading. This focus may lead to a fixed or overly negative view that sees post-apartheid South African school funding system as unable to escape the effects of historical inequalities. It is important to point out that this perspective can overlook the small but meaningful changes and improvements that have taken place within the system.

Moreover, the key aspects of the critical theory used in this study – such as ‘the dominant view of society,’ ‘causes of the dominant view,’ and ‘dissatisfaction and change of the dominant view’ – are based on the idea that post-apartheid South African individuals are unaware of the ongoing ideology that contributes to their marginalisation. This assumption can be problematic, as it risks ignoring the awareness, agency, and resistance of the very communities the study aims to support. In addition, critical theory often blames the failure of school funding policies entirely on this persistent ideology. This overlooks other important reasons for policy failure, such as poor government implementation or lack of resources, which are not necessarily linked to ideology. It can also come across as arrogant by suggesting that the researcher has uncovered the truth, while assuming that ordinary people are unaware or misled. This attitude risks silencing the voices of post-apartheid South African individuals, even though they may have valid views and experiences regarding the failures of school funding policies. Finally, critical theory tends to focus mainly on exposing problems but often does not offer practical solutions or guidance for addressing the issues it identifies.

Nevertheless, it allows for a deeper look at how unfair systems are kept alive through everyday beliefs and actions. However, it must be used carefully and alongside other tools to avoid being too abstract or one-sided.

4.4 Selecting the Double Lens: The Reason Why the Social Justice Theory and Critical Theory Matter in this Study

The reason for the selection of the theoretical framework is that it has two parts, namely, the social justice part and the critical theory part, which are in turn characterised by their significant strengths which make up for each other’s limitations. The theoretical framework allows for this study not only to bring to light the systemic and structural inequalities that play a role in perpetuating inequalities in the education system but also to bring to light context-sensitive solutions to the existing perpetuated inequalities that are found in the actual provision of quality education by post-apartheid South African schools – this shows that the theoretical framework is both abstract-specific and praxis-specific in its evaluation and analysis of the society. The use of the selected theoretical framework allows for this research study not only to offer a

critique on the remnants of historical inequalities that are entrenched within post-apartheid South African school funding model but also to offer suggestions towards ensuring the ridding of the constraints answered for by the remnants of historical inequalities. This theoretical framework is characterised by its suitability for analysing post-apartheid South African school funding model, where the remnants of historical inequalities continue to constrain its intended purposes of the provision of quality education for all. The theoretical framework provides a bridge between critique (abstract-specific) and action (praxis-specific) which results in a powerful and comprehensive approach aimed at understanding and addressing the existing social injustice in post-apartheid South African school funding model established to address the deeply stratified education system.

4.5 Bringing the Double Lens into Focus: How the Social Justice Theory and Critical Theory in Dialogue Shape this Study

The social justice theory which is part of the theoretical framework used in this study, provides a lens through which to critically evaluate how post-apartheid South African education funding policies articulate their intentions to do away with injustices such as “maldistribution,” “misrecognition,” and “misrepresentation” (Fraser, 2008, p. 13). The commitment to remedying these injustices is initially observed in the ‘who’ of justice, which concerns itself with identifying the bona fide subjects of social justice. Therefore, this study examines the South African Constitution – the foundational policy of post-apartheid South Africa – using the three dimensions of the ‘who’ of justice. The aim is to assess whether the Constitution recognises past educational injustices and includes laws that promote actions based on social justice. This section looks at how well the Constitution addresses the economic, cultural and political aspects of the ‘who’ of justice, to see if it truly reflects the values of social justice.

The first dimension addresses the notion of people suffering²⁰ from distributive injustice or maldistribution because of the economic structures that are put in place in societies (Fraser, 2009). These economic structures impede people’s full participation by denying them the resources that put them in a societal position whereby they could interact with others as peers (Fraser, 2009). In the context of this study, this economic dimension of the ‘who’ of justice is used to evaluate whether the South African Constitution is supported by legislated provisions

²⁰ Fraser, 2008, p. 13) points out that the “examples include exploitation (having the fruits of one’s labour appropriated for the benefit of others); economic marginalization (being confined to undesirable or poorly paid work or being denied access to income-generating labour together), and deprivation (being denied an adequate material standard of living)”.

that acknowledge the existing maldistribution pertaining to school funding in post-apartheid South Africa and sheds light on the importance of addressing the maldistribution.

The second dimension is people suffering²¹ from status inequality, in other words, misrecognition (Fraser, 2009). This is the result of the institutionalised hierarchies of cultural value that are put in place in societies (Fraser, 2009). These institutionalised hierarchies of cultural value prevent people's interaction in terms of parity by denying them requisite standing (Fraser, 2009). Therefore, in the context of this study, this cultural dimension of the 'who' of justice will be used to evaluate whether the South African Constitution is supported by legislated provisions that recognise the existing misrecognition in school funding in post-apartheid South Africa and sheds light on the importance of addressing the misrecognition.

The third dimension is that people experience political obstacles, in other words "ordinary-political²² misrepresentation" (Fraser, 2009, p. 18). This is the result of the "political constitution of society, as opposed to the class structure or status order" (Fraser, 2009, p. 18). For Fraser (2008, p. 6), ordinary-political misrepresentation is a distinct form of injustice that arises when "skewed decision rules compromise the political voice of some who are already counted as members, impairing their ability to participate as peers in social interaction." Therefore, in the context of this study, this political dimension of the 'who' of justice will be used to evaluate whether the South African Constitution is supported by legislated provisions that recognise the existing misrepresentation regarding school funding in post-apartheid South Africa and sheds light in the importance of addressing the misrepresentation.

Based on the "who" of justice used to evaluate the South African Constitution, the Constitution's original goals – especially the right to education – can be seen in the implementation of the SASA. Therefore, this study evaluates the SASA using the three dimensions of the 'what' of social justice: redistribution, recognition, and representation. The aim is to assess whether SASA helps to correct the educational injustices of the past, as identified in the Constitution, which include unfair distribution of resources (maldistribution), lack of respect for identity and culture (misrecognition), and exclusion from decision-making

²¹ Fraser, 2008, p. 13) points out that the "examples include cultural domination (being subjected to patterns of interpretation and communication that are associated with another culture and are alien and/or hostile to one's own); nonrecognition (being rendered invisible via the authoritative representational, communicative, and interpretative practices of one's own culture); and disrespect (being routinely maligned or disparaged in stereotypic public cultural representations and/or in everyday life interactions)."

²² Fraser (2009, p. 18) points out that the ordinary-political misrepresentation "occurs when political boundaries and/or decision rules function wrongly to deny some people the possibility of participating on par with others in social interaction – including, but not only, in political arenas".

(misrepresentation). This section examines how well the SASA reflects these three remedies, to see whether it supports the values of social justice. In the first dimension, according to Fraser (2008, p. 15):

“The redistribution paradigm treats [economic differences] as unjust differentials. Far from being intrinsic properties of groups, they are the socially constructed results of an unjust political economy. From this perspective, accordingly, we should strive to abolish, not recognise, group differences” (Fraser, 2008, p. 15).

Fraser and Honneth (2003) remind us that the economic dimension of social justice relates to the redistributive claims. When it comes to the redistributive²³ claims, what they seek is a more just distribution of resources and wealth (Fraser & Honneth, 2003). Fraser and Honneth (2003, p. 7) remind us that the “examples include claims for redistribution from the North to the South, from the rich to the poor, and (not so long ago) from the owners to the workers”. Therefore, this dimension of the ‘what’ of justice will be used to evaluate whether the SASA makes the redistribution of school funding in post-apartheid South Africa a reality.

In the second dimension, “the recognition paradigm”²⁴, in contrast, treats differences in either of two ways. In one version, they are benign, pre-existing cultural variations, which an unjust interpretative schema has maliciously transformed into a value hierarchy. Here, the social justice recognition remedy concerns revaluing devalued traits; thus, we should celebrate, not eliminate, group differences. In another version, group differences do not pre-exist their transvaluation but are constructed contemporaneously with it. Here, the social justice recognition remedy concerns deconstructing the terms in which the differences are currently elaborated (Fraser, 2008). Moreover, Fraser and Honneth (2003) remind us that the cultural dimension pertains to the politics of recognition claim. Here the goal, in its most plausible form, is a difference-friendly world, where assimilation to majority or dominant cultural norms is no longer the price of equal respect. Therefore, this dimension of the ‘what’ of justice will

²³ Fraser (2008, p. 13) points out that “in the redistribution paradigm, the remedy for injustice is economic restructuring of some sort. This might involve redistributing income and/or wealth, reorganizing the division of labour, changing the structure of property of ownership, democratizing the procedures by which investment decisions are made, or transforming other basic economic structures”.

²⁴ Fraser (2008, p. 13) points out that “in the recognition paradigm, in contrast, the remedy for injustice is cultural or symbolic change. This could involve upwardly revaluing disrespected identities and the cultural products of maligned groups; recognizing and positively valorising cultural diversity; or transforming wholesale societal patterns of representation, interpretation, and communication in ways that would change everyone’s social identity”.

be used to evaluate whether the SASA has legislated provisions that make the recognition of marginalised communities a reality.

In the third dimension, the remedy for injustice pertains to representation²⁵, which is concerned with the political dimension of social justice. Fraser (2008) explains that “representation serves in part to account for ‘ordinary-political injustices,’ which arise internally, within bounded political communities, when skewed decision rules compromise the political voice of some who are already counted as members, impairing their ability to participate as peers in social interaction” (p. 6). This dimension shifts the focus from economic structures or cultural hierarchies to the very procedures and institutions through which decisions are made, and participation is granted or denied. Fraser (2008) further asserts that political justice requires ensuring parity of political voice and full inclusion in decision-making processes. Therefore, this dimension of the ‘what’ of justice will be used to evaluate whether the SASA makes the representation of marginalised communities a reality.

Following the discussion on social justice theory, this study now turns to the second theoretical lens – critical theory – as part of the theoretical framework used in this study to evaluate post-apartheid South African education funding policies. Critical theory provides a lens through which to evaluate why post-apartheid South African education funding policies succeed or fail at achieving their articulated intentions to do away with injustices such as maldistribution, misrecognition and misrepresentation. It is thus important to use critical theory’s dominant view of the society, causes of the dominant view of society, and the dissatisfactions and change of the dominant view of society to evaluate the NNSSF (1998) as amended in 2006 as it characterises the practical implications of post-apartheid South African laws – the South African Constitution and the SASA. Any resultant failure to adhere to the values of social justice observed in the evaluation of the NNSSF (1998) amended in (2006) regarding its practical policies such as the quintile ranking system, per-learner allocations, the no-fee schools, the fee-paying schools and the fee-exemption policy will be better understood using the critical theory lens. The reason for this is because the critical theory offers us the ‘why’ of the ‘who’ and ‘what’ of social justice – which is all about the reasons for and the consequences of what we do. This refers to the fact that critical theory in the NNSSF section will evaluate reasons for and the consequences of the success or failure of the NNSSF as underpinned by the

²⁵ Fraser (2008, p. 13) points out that “remedying such injustice requires representation, which entails parity of political voice and the full inclusion of all in processes of public decision-making.”

South African Constitution and the SASA (84 of 1996) foundational intentions and courses of action, respectively.

In this section, the dimension of critical theory, namely, “the dominant view of society” is used to evaluate post-apartheid South African school funding policies. Morrow et al. (1994, p. 2) remind us that “ideology is what prevents the agents in the society from correctly perceiving their true situation and real interests; if they are to free themselves from social repression, the agents must rid themselves of ideological illusion.” It is important to understand that the theory of ideology comes into play when there is a process of questioning and criticizing the beliefs, attitudes, and desires of people within a particular society (Morrow et al., 1994). The criticism of the beliefs, attitudes, and wants of the agents in a particular society is borne from the observations made as critical theory is a reflective theory. The observations often include that the agents in the society are deluded – when it comes to themselves, their position, the society, or their interests – by the existing ideology (Morrow et al., 1994). Therefore, it should be noted that critical theory which holds the reflective theory characteristic serves to demonstrate to the agents of a particular society that they are existing on a deluded reality as per the ideology at play (Morrow, Morrow, & Brown, 1994). Therefore, in this research report the uncovering of the ideology that plays a role in the successes and failures observed in the evaluations pertaining to the ‘who’ of justice and in the ‘what’ of justice in relation to post-apartheid South African funding policies will be guided by the “dominant view of society.”

In this section, the critical theory dimension called “causes of the dominant view of society” will be used to examine post-apartheid South African school funding policies. It is important to note that this dimension is guided by three key ideas that shape how people understand ideology and its influence on their thinking:

- a. A form of consciousness is an ideology by virtue of some of its epistemic properties²⁶ of the beliefs which are its constituents. Therefore, the epistemic property of consciousness will be used to evaluate how the foundational knowledge claims – intended outcomes – of post-apartheid South African school funding policies are inconsistent with post-apartheid South African reality.

²⁶ Morrow, Morrow, and Brown (1994, p. 14) remind us that “a form of consciousness is ideologically false if it contains a false belief to the effect that the particular interest of some subgroups is the general interest of the group as a whole”.

- b. A form of consciousness qualifies as ideology by virtue of its functional properties²⁷, which represents how it perpetuates the existing social structures. Therefore, the functional properties of consciousness will be used to evaluate how the proposed courses of actions of post-apartheid South African school funding policies contradict its intended purposes.
- c. A form of consciousness can be ideological due to its genetic properties²⁸, which pertain to the historical or social origins of the ideas it is made up of. Therefore, the genetic properties of consciousness will be used to evaluate how the claim of context-specificity of post-apartheid South African school funding policies was overlooked as the entrenched structural inequalities continue to prevail.

In this section, the dimension of critical theory, namely, “the dissatisfactions and change of the dominant view of society” will be used to evaluate post-apartheid South African school funding policies. The “dissatisfactions and change dominant view of society” are underpinned by an explanation offered by Morrow et al. (1994) regarding the influence critical theories on human action. According to Morrow et al. (1994, p. 2) “critical theories have special standing as guides for human action in that: (a) they are aimed at producing enlightenment in the agents who hold them, i.e. at enabling those agents to determine what their interests are; (b) they are inherently emancipatory, i.e. they free agents from a kind of coercion which is at least partly self-imposed, from self-frustration of conscious human action.” It should be noted that given the central argument of this research report in Chapter 1, it is fitting to observe the dissatisfactions pertaining to post-apartheid South African school funding policies and the proposed changes to these policies stemming from the dissatisfactions.

4.6 Conclusion

In this chapter, first, I have clarified the key concepts that form part of this study’s theoretical framework, namely, (a) the ‘what’ of social justice, (b) the ‘who’ of social justice, (c) ‘dominant view of society’, (d) ‘the causes of the dominant view of society’, and lastly (e) ‘the dissatisfactions and change of the dominant view of society’. Second, I have outlined the

²⁷ Morrow, Morrow, and Brown (1994, p. 14) remind us that “a form of consciousness is an ideology in virtue of the function or role it plays in supporting, stabilizing or legitimizes domination or hegemony. It is virtue of the fact that it supports or justifies reprehensible social instruction, unjust practices, relations of exploitation, hegemony, or domination that a form of consciousness is an ideology.”

²⁸ Morrow, Morrow, and Brown (1994, p. 19) remind us that “a form of consciousness is ideologically false in virtue of the fact that the ‘beliefs and attitudes’ which compose it are ‘related in a causal sense to the social situation and thereby to the interests of the believer.’ So, presumably, a form of consciousness is an ideology in virtue of something about its causal history”.

limitations that come with the use of this study's selected theoretical framework. Third, I have shown the reasons for the use of this study's selected theoretical framework while being cognizant of its limitations and I have shown how those limitations will be navigated in this research report. Finally, I have shown how the selected theoretical framework will be used for the purposes of evaluating and analysing post-apartheid South African school funding models.

CHAPTER 5: THE EVALUATION OF THE SCHOOL FUNDING POLICIES: THE SOUTH AFRICAN SCHOOLS ACT AND THE NATIONAL NORMS AND STANDARDS FOR SCHOOL FUNDING

5.1 Introduction

This chapter critically evaluates the alignment of the SASA and the NNSSF with the South African Constitution's commitment to the right to education. The first section presents an evaluative and theoretical analysis of the Constitution, the main policy guaranteeing the unconditional right to education. The second section analyses the SASA, the legislation enacted to realize this right. The third section evaluates the NNSSF (1998, amended 2006), the specific funding policy that operationalized the SASA through models like the quintile ranking system, per-learner allocation, and fee policies. This structure reflects the logical progression from the foundational constitutional right to its legislative and policy implementation.

Moreover, I remind the reader that in this chapter the use of my theoretical framework is key. This chapter is divided into three sections. The first section examines the South African Constitution using the three dimensions of the 'who' of justice to assess whether it recognises the educational injustices of post-apartheid South Africa. The second section evaluates the SASA through the lens of the 'what' of social justice – redistribution, recognition, and representation – to determine how it addresses the injustices identified in the Constitution. The final section analyses the NNSSF (1998) as amended in (2006) using three dimensions of critical theory: the "dominant view of society," its "causes," and the "dissatisfaction and change" it brings. This is done to explore how these policies are put into practice and their real-world impact.

5.2 Framing the Right to Education: The Role of the South African Constitution

In its preamble, the South African Constitution states that "the constitution is the supreme law of the land, adopted to heal the divisions of the past, to establish a society based on democratic values, social justice and fundamental human rights and to improve the quality of life of all citizens and free the potential of all people" (Republic of South Africa, 1996). Heyns and Brand (1998) remind us that bills of rights often emerge from periods of struggle and thus serve as a collective commitment that is directed towards the prevention of the recurrence of the conditions that led to the periods of struggles in the first place. Based on this, it should be noted that "these bills of rights by nature have a retroactive element [and] the South African Bill of

Rights is a case in point” (Heyns & Brand, 1998, p. 153). There are three²⁹ types of rights that the South African Bill of Rights sets out to protect, namely, first-generation rights, second-generation rights and third-generation rights. For the purposes of this study, the right that is the focus is the right to education, a second-generation right. The right to education, protected by the Bill of Rights in the post-apartheid South African Constitution, forms the basis for the country’s school funding models. These models are designed to fulfil the constitutional obligation to guarantee this right.

5.2.1. A Justice Test: Evaluating the South African Constitution’s (1996) Educational Commitments

According to Arendse (2011, p. 342) “in order to realise the goals of the Constitution, an interpretation of the right must be aimed at rectifying the injustices of the past.” The South African Constitution not only protects individual rights, but it also protects socioeconomic rights for the purposes of improving people’s lives, particularly of those who were disadvantaged. It should be noted that in the socioeconomic rights, the South African Constitution entrenches its promotion of social justice. To effectively enforce socioeconomic rights, it is essential to first understand the past injustices – social, economic, and political – that are deeply rooted and continue to influence South African society. Therefore, these rights should not be considered separately from the inequalities that existed in the past and have been perpetuated in the present.

The South African Constitution is an instrument that seeks to transform post-apartheid South Africa through correcting past injustices by taking an active stance on addressing apartheid inequalities that are entrenched in its society. However, in the South African Constitution one will not find, in express terms, the obligation to remedy the injustices in place – such as redistribution, recognition and representation. However, the South African Constitution is not always direct in its wording, but it does suggest that addressing existing injustices is important. It implies that the ideal approach to justice includes redistribution, recognition, and

²⁹ “First-generation rights: civil and political rights, i.e. rights and freedoms that prohibit the state from interfering in the affairs of the individual; Second-generation rights: economic and social rights, i.e. rights concerned with the state’s obligation to provide and improve socioeconomic conditions of the individual; and Third-generation: (or group or solidarity rights), namely, rights that are people centred rather than individual centred” (Mathebula, 2018, p. 95).

representation. This can be owed to the fact that the South African Constitution is committed to ensuring that the society is based on the premise³⁰ of social justice.

Therefore, it is important to interpret the right to education in relation to its aim of rectifying past injustices. In the South African Constitution in Section 29(1)³¹ one can find the guarantee of education; however, simply declaring the right to education does not lead to the automatic provision of quality education to every child in post-apartheid South Africa. It is important to recognise that the apartheid regime left a legacy of previously disadvantaged communities attending schools that are facing underfunding and the provision of poor-quality education. This leads to the consideration that when socioeconomic rights are enforced only as individual elements without making a provision for elements that can only be enjoyed in a group – due to historical disadvantages – then learners from previously disadvantaged communities may continue to experience the repercussions of the apartheid regime.

5.2.2. Theoretical Reflections on the South African Constitution's (1996) Education Commitments

In this section, I present the evaluative analysis of the South African Constitution, the two-fold theoretical framework in Chapter 4 and the literature review pertaining to school funding from the following perspectives: the global, continental and regional. In the evaluation of the South African Constitution, we have seen that the policy upholds the rights discourse and recognises those who are the bona fide recipients of economic, cultural and political social justice.

The South African Constitution is a foundational policy in the local context of post-apartheid South Africa which presents a profoundly ambitious vision for the right to education. This mirrors what the literature in Chapter 3 has shown us regarding foundational policies from a global perspective, namely, the EFA and the SDGs and from a continental perspective, namely, the CESA. These foundational policies from the global and continental perspectives clearly prioritise the rights discourse as well as the social justice values. However, the literature in Chapter 3 shows us that the foundational mandates provided by the EFA, the SDGs and the

³⁰ “[I]t is not only the constitutional text that forms the context within which the rights in the Bill of Rights must be viewed. [To] trace the direction in which the transformative project is supposed to move it is necessary to come to grips with the larger context within which the text of the Bill of Rights is to be interpreted. Thus, the Constitutional Court has often stated that the historical, social and economic context must be [considered] when interpreting the provisions of the Bill of Rights” (De Vos, 2001, p. 261).

³¹ “(1) Everyone has the right – (a) to a basic education, including adult basic education; and (b) to further education, which the state, through reasonable measures, must make progressively available and accessible” (South Africa, 1996, s. 29).

CESA are not always translated very well in the education system. This becomes clear when looking at how these policies, which are meant to uphold the right to education, show a clear gap between what the policies aim to achieve, and the actual progress made in transforming schools. This is not a mere flaw, but a systemic problem and it perpetuates legacies of inequality that affect marginalized groups and, most importantly, undermines the core social justice values of these foundational policies. This brings to the fore that there is a challenge to ensure that the gap that exists between policy intentions and the actual transformation of schools must be bridged.

Given the latter, my stance is that this gap has always existed when we consider the global and continental foundational policies to begin with. Therefore, it is naïve to assume that the South African Constitution's (1996) influence in promulgating the SASA and the NNSSF will somehow defy the trend. Rather, I assert that it is more than likely that failures observed in the global and the continental mandates of the foundational policies will be observed in the local context of post-apartheid South Africa. This raises concerns about the ability of foundational policies to drive the meaningful change that their mandates are committed to and thereby highlights the need for a more nuanced understanding of the existing complex relationship between policy intentions and the actual transformation of schools. In the second section of this chapter, we find the evaluative analysis of the SASA and in the third section, we find the evaluative analysis of the NNSSF. These sections will indicate whether there is a disconnect between policy intentions and practical reality.

5.2.2.1. The South African Constitution

The South African Constitution presents as a foundational policy which prides itself on its recognition of the 'who' of justice through its incorporation of the right to education within its Bill of Rights. Using Fraser's social justice theory, it is important to understand that the right to education should not be seen only as a symbolic recognition of those who were historically marginalised – particularly black South Africans who faced economic, cultural, and political injustices under apartheid. The language of the South African Constitution shows a clear commitment to addressing these past inequalities by promoting education as a key tool for transforming post-apartheid society. However, if the Constitution is not followed by well-designed policies and proper implementation, the promised transformation of schools may not happen. As a result, historically marginalised groups may be recognised on paper but will still face real economic barriers to accessing quality education. This means that the lack of the implementation of policies that disrupt the economic, cultural and political injustices will lead

to the South African Constitution being at risk of only providing a symbolic recognition. This in turn would reveal the gap that needs to be bridged between the intended purposes (intent) of policy and their resultant unintended consequences, i.e., lack of transformation of schools which continue to be structurally divided.

5.2.2.2. Education for all and the Sustainable Development Goals

Globally, the EFA and the SDGs are foundational policies which pride themselves on being universalist policy documents and offer the promise of inclusive and equitable quality education. An evaluation of these foundational policies using the ‘who’ of social justice by Fraser will reveal whether they prioritise the bona fide recipients of social justice who were economically, culturally and politically marginalised. When looking at the language used in the EFA and the SDGs, it focuses mainly on inclusion. However, this focus overlooks the importance of true incorporation, which risks treating all historically marginalised groups as if they are the same. As a result, both the EFA and the SDGs show that some progress has been made in improving access to quality education, but they are not enough to achieve real social justice. This is because they fail to fully address the specific economic, cultural, and political injustices faced by historically marginalised groups.

5.2.2.3. The African Union’s Continental Education Strategy for Africa

Continentially, the CESA recognises the unique history of the continent of Africa regarding its inherited legacy of economic, cultural and political injustices. This shows that the CESA has a context-specific approach whereby it recognises the injustices and explicitly calls for their remedies. The evaluation of the CESA reveals that it has the potential to ensure the social justice values articulated by Fraser (2009), particularly recognition, are operationalised. It does this by centralising the African identity, heritage and political autonomy in its vision. However, where the CESA fails is that it does not explicitly provide clarity on how its commitment will be translated into practical redistribution regarding those who were historically marginalised in terms of economic, cultural and political dimension of social justice.

5.3 Implementing the Constitutional Promise: A Look at the South African Schools Act (84 of 1996)

Given the ideals pertaining to the right to education articulated in the South African Constitution which is the first anchor pertaining to the provision of public education, post-

apartheid South African government introduced the SASA³² in 1996. The primary objective of the SASA is “to provide for a uniform system for the organisation, governance and funding of schools”. Moreover, in the SASA, one finds the second anchor pertaining to the provision of public education in Section 12³³. The second anchor is evidence that the SASA complies with the South African Constitution’s promise of the right to education.

5.3.1 The Role of the School Governing Bodies

This section considers the SASA’s mandate to uphold school governance and community involvement in post-apartheid South African education system through its implementation of the SGBs. In Section 20(1)(a)³⁴ of SASA one finds the provision pertaining to the foundational governance role of the SGBs. This invites community members where schools are located to support progress toward providing quality education. This reveals that the SASA reflects a critical element of decentralisation concerning the South African school funding model. Decentralisation refers to “a shift in the location of governance and the devolution of some authority and institutional autonomy to the local school and community” (du Plessis, 2020, p. 167). This is seen in the way in which the schools’ decision-making authority, responsibility and tasks are transferred from higher to lower or between organisations (du Plessis, 2020). The SASA sets out the requirements for the SGBs in Section 20³⁵ and Section 21³⁶. Section 20 of

³² The SASA in its preamble states that the South African schooling system should “uphold the rights of all learners, parents and educators, and promote their acceptance of responsibility for the organisation, governance and funding of schools in partnership with the State” (South Africa, 1996, p. 1).

³³ “12. Provision of public schools (1) The Member of the Executive Council must provide public schools for the education of learners out of funds appropriated for this purpose by the provincial legislature” (South Africa, 1996, p. 10).

³⁴ “20. Functions of all governing bodies: (1) Subject to this Act, the governing body of a public school must - (a) promote the best interests of the school and strive to ensure its development through the provision of quality education for all learners at the school;...” (South Africa, 1996, p. 19).

³⁵ “(1) The governing body of a public school must: (a) promote the best interests of the school and strive to ensure its development through the provision of quality education for all learners at the school; (b) adopt a constitution; (c) develop the mission statement of the school; (d) adopt a code of conduct for learners; (e) support the principal, educators and other staff of the school in the performance of their professional functions; (f) determine times of the school day consistent with any applicable conditions of employment of staff at the school; (g) administer and control the school’s property, buildings and grounds occupied by the school (subject to relevant policies); (h) encourage parents, learners, educators and other staff to render voluntary services to the school; (i) recommend to the Head of Department the appointment of educators and non-educator staff at the school, subject to the Employment of Educators Act and Labour Relations Act. (2) The governing body may also: (a) allow the reasonable use of school facilities for community, social or school fundraising purposes, subject to approval; (b) allow fundraising on school premises; and (c) support cultural and sports activities at the school” (South Africa, 1996, p. 27).

³⁶ “(1) A governing body may apply to the Head of Department to be allocated any of the following additional functions: (a) Maintain and improve the school’s property, buildings and grounds; (b) Determine the extra-mural curriculum and the choice of subject options according to provincial curriculum policy; (c) Purchase textbooks, educational materials or equipment; (d) Pay for services to the school; (2) The Head of Department must assess the

the SASA prescribes a range of functions to be undertaken by governing bodies of public schools while Section 21 prescribes an additional range of functions to be undertaken by public schools that show competence in performing those additional functions (Mestry, 2018). Mestry (2016, p. 389) reminds us that the establishment of the SGBs is synonymous with the concepts ‘self-managing’ or ‘self-reliant’ schools. Karlsson (2003, p. 330) argues that “the powers and functions of governing bodies fall into two categories thereby enabling some schools to have different levels of SGB participation in school affairs than the SGBs as other schools”. These different levels depend on the responsibility and support of the greater community such as community-based funding and the availability of members of the SGBs with the expertise to ensure that the school is developed for self-management and is less dependent on the state.

5.3.2 School Funding Provisions

This section considers the school funding provisions outlined in the SASA, focusing on the models and criteria used for allocating resources to schools and how these provisions aim to address disparities in the provision of quality education. School funding measures are designed to help post-apartheid South African learners fully enjoy their right to education. To address the inequalities in access to quality education caused by apartheid, the South African Schools Act (SASA 84 of 1996) introduced a solution through Section 34. It should be noted that Section 34³⁷ sets out the obligation of post-apartheid South African government to ensure that they fund public schools. Section 34 is a concrete expression of the commitment to the South African Constitution’s (1996) mandate of the right to education and thereby legally requires post-apartheid South African government to fund public schools. To expand on Section 34, the SASA legislates a provision in Section 35³⁸ which stipulates the ways in which post-apartheid

governing body’s capacity before allocating such functions; (3) A governing body with allocated functions must exercise them in a way that does not interfere with the professional management of the school by the principal” (South Africa, 1996, p. 30).

³⁷ “34. Responsibility of State: (1) The State must fund public schools from public revenue on an equitable basis in order to ensure the proper exercise of the rights of learners to education and the redress of past inequalities in education provision; (2) The State must, on an annual basis, provide sufficient information to public schools regarding the funding referred to in subsection (1) to enable public schools to prepare their budgets for the next financial year” (South Africa, 1996, p. 36).

³⁸ “35. Norms and standards for school funding: (1) Subject to the Constitution and this Act, the Minister must determine national quintiles for public schools and national norms and standards for school funding after consultation with the Council of Education Ministers and the Minister of Finance. (2) The norms and standards for school funding contemplated in subsection (1) must (a) set out criteria for the distribution of state funding to all public schools in a fair and equitable manner; (b) provide for a system in terms of which learners at all public schools can be placed into quintiles, referred to as national quintiles for learners, according to financial means; (c) provide for a system in terms of which all public schools in the Republic can be placed into quintiles referred to as national quintiles for public schools, according to the distribution of learners in the national quintiles for learners;

South African government must carry out its obligation to fund public schools through public revenue. The funding model is the NNSSF. It should be noted that it represents a practical funding model that is used to allocate resources that are necessary for the provision of public education based on the socioeconomic status of school communities. This newly introduced funding model is a way of ensuring that there is a tangible commitment to the South African Constitution's (1996) mandate of the right to education.

Section 36³⁹ of the SASA sets out the obligation to find additional sources of funding to supplement the government's allocation of funds on SGBs of every school in post-apartheid South Africa. It should be noted that the supplementary funding method is the decision to charge parents school fees⁴⁰ for the provision of education for their children. Mestry (2020) supports this, by pointing out that "charging parents school fees is one of the more lucrative ways of supplementing inadequate funding provided by the state" (p. 9). The reason for the supplementation of government school funding is that there is a marginal state subsidy, thereby putting the responsibility on the SGBs to supplement government school funding to ensure the continued provision of quality education by schools (Mestry, 2020, p. 4). Hence, Van Dyk and White (2019) remind us that "as government funding is often insufficient to run a school effectively, other sources of funding must be considered, of which the paying of school fees is the most common" (p. 4).

Section 39⁴¹ addresses the fee-paying function of post-apartheid South African schools through its provision for SGBs to charge fees from parents (Mestry, 2020). Thus, the fee-paying schools depend on parents making contributions to schools' funds (Mestry, 2020). According to Mestry (2016, p. 2) "the concept of self-managed schools is significant for the transformation of post-apartheid South African school system, as well as education systems in developing countries

and (d) determine the procedure in terms of which the Member of the Executive Council must apply the criteria contemplated in paragraph (a)" (South Africa, 1996, p. 36).

³⁹ "36. Responsibility of governing body: (1) A governing body of a public school must take all reasonable measures within its means to supplement the resources supplied by the State [to] improve the quality of education provided by the school to all learners at the school" (South Africa, 1996, p. 37).

⁴⁰ The SASA in Section 1 explains school fees by pointing out that it "school fees contemplated in Section 39 and includes any form of contribution of a monetary nature made or paid by a person or body in relation to the attendance or participation by a learner in any programme of a public school" (South Africa, 1996, p. 6).

⁴¹ "39. School fees at public schools: (1) Subject to this Act, school fees may be determined and charged at a public school only if a resolution to do so has been adopted by [many] parents attending the meeting referred to in section 38 (2). (2) A resolution contemplated in subsection (1) must provide for - (a) the amount of school fees to be charged; (b) equitable criteria and procedures for the total, partial or conditional exemption of parents who are unable to pay school fees; and a school budget that reflects the estimated cumulative effect of - the established trends of non-payment of school fees; and the total, partial or conditional exemptions granted to parents in terms of the regulations contemplated in subsection (4)" (South Africa, 1996, p. 40).

plagued with major challenges in school funding and the provision of quality education”. Mestry (2016) states that there are positive results that come with self-managed schools – whereby the self-managed schools tend to be well-resourced schools which in turn contribute to the provision of quality education in post-apartheid South Africa. Given this, the research conducted by Mestry (2016) emphasises that it is imperative for self-managed schools to be allowed to charge fees, engage in unconventional fundraising initiatives, and to manage their funds to further reinforce the provision of quality education and good education outcomes.

5.3.3 Evaluating the SASA (84 of 1996): Redistribution, Recognition and Representation in Focus

In this section, I argue that the SASA reveals that it leans towards social justice through its mandate that represents a redistribution remedy to an inherited maldistribution. The mandate is its provision that post-apartheid South African schools must be ranked into quintiles. The introduction of the quintile ranking system is an example of how post-apartheid South African government aims to support school funding fairly. It does this by giving more money to schools in the lower quintiles and less to those in the higher quintiles, in order to promote the idea of redistribution.

Furthermore, the SASA shows a commitment to social justice through its focus on recognition and representation. It does this by addressing the past problems of misrecognition and misrepresentation under apartheid. One way it does this is by moving away from centralised control and introducing a more decentralised way of organising, governing, and funding schools. This change, known as post-apartheid school governance reform, aims to make schools more democratic and better suited to the needs of different communities (Karlsson, 2003).

It is important to note that SASA achieved school governance reform by introducing SGBs. This feature of SASA shows its move toward social justice, as it helps to correct past misrecognition by giving more voice and involvement to those who were previously excluded from school decision-making.

During apartheid in South Africa, communities with low income were excluded from taking part in school governance. This meant they had no say in the kind of education their children received. The goal of introducing SGBs through SASA was to correct this by including these communities in school decision-making. The creation of SGBs also supports the idea of

recognition by allowing people from the local community, where the school is located, to help make important decisions. This inclusion ensures that decisions about how schools are run and funded are based on local knowledge of the community's specific challenges and opportunities.

More importantly, it helps us understand the important role that SASA (84 of 1996) plays in recognising the different backgrounds of schools. For example, previously disadvantaged schools and previously advantaged schools come from very different situations. The SGBs, made up of people from those same communities, have first-hand knowledge of these circumstances and are better able to make decisions that suit each school's specific needs. However, its recognition and representation remedies come with unintended consequences that lean away from social justice – consequences which, ultimately outweigh its intended justice-oriented aims. This will be fully developed in Chapter 6.

5.3.4 Theoretical Reflections on the Role of the South African Schools Act (84 of 1996) in Education Reform

In this section, I present a discussion that connects the evaluation of SASA, the two-part theoretical framework from Chapter 4, and the literature review on school funding. This discussion is organised around three levels: global, continental (Africa), and regional (South Africa). In the evaluation of the SASA, we have observed that the policy upholds decentralisation through its provisions pertaining to the SGBs. The continental literature shows us that the Ghanaian FCUBE is similar to the SASA's decentralisation of school funding and governance through its introduction of the School Management Committees (SMCs). However, there is a difference in that the Ghanaian FCUBE SMCs are not formalised and legalised like the SASA SGBs and thereby serves a symbolic sign of decentralisation instead of a substantive one. The symbolic nature of the Ghanaian FCUBE SMCs is better explained when considering that the committees function only in an advisory capacity and thereby do not have legalized authority and resources to have an influence on school funding and governance. Therefore, the Ghanaian FCUBE fails to fulfil the 'what' of social justice mooted by Fraser (2008) because it does not provide recognition and representation to the historically marginalised in the school funding and governance.

The global, continental, and regional literature shows that Brazil's FUNDEF and later FUNDEB, Ghana's FSHS and school CG, and Zimbabwe's BEAM and ETF take different approaches to education funding and governance when compared to SASA. They all follow a centralised, top-down model. In these models, funding and key decisions are controlled mainly

by national ministries and government agencies, rather than by the schools or local communities. This reveals the exclusion of parents' and community members' involvement in the management and key decision-making about their children's school funding.

Based on the Fraser's (2008) social justice – particularly recognition and representation – the centralised nature of the FUNDEF, the FUNDEB, the FSHS, the school CG, the BEAM and the ETF is problematic. When the historically marginalised continue to be excluded from the key decision-making of their children's education, this perpetuates misrecognition and misrepresentation. The focus on redistribution alone shows that these initiatives have failed to fully address the deep-rooted inequalities in their education systems. This is because they do not engage with the cultural and political aspects of injustice, and they overlook the importance of recognition and representation. As a result, they have not been able to reduce the gap in the quality of education between poor and wealthy schools. Although global and continental policies like the EFA, the SDGs and CESA promote the right to education, it might seem that programmes initiated in various countries aim to put this right into practice. However, these programmes do not fully meet the standards of a rights-based approach set by the foundational policies.

They have a narrow focus on educational resources and miss the opportunity to empower historically marginalised groups through representation and recognition which assist in restructuring the entrenched underlying inequalities that lead to exclusion of the historically marginalised groups in the education system. Their failure to address the disparities between the wealthier and poorer schools perpetuates the inherited inequalities which reinforces the existing disparities in the provision of quality education, which in turn shows their failure to fulfil the foundational policies' mandate. Moreover, they do not embody the intention to address the structural changes pertaining to school governance in terms of representation and recognition of the historically marginalised.

In conclusion, the comparison between the evaluation of SASA, the two-part theoretical framework in Chapter 4, and the literature on school funding at the global, continental, and regional levels shows a clear pattern: many school funding models support social justice in theory but fail to achieve real change in schools. In contrast, SASA puts the social justice mandate into practice by clearly supporting the decentralisation of school funding and governance through SGBs. However, the lasting impact of apartheid-era inequalities limits its efforts. These inequalities turn the goal of recognition and representation into a continuation of

a bifurcated model of school funding and governance, as discussed in the evaluation. Therefore, the SASA leads to social injustices by proving to be unable to untangle itself from the historical apartheid inequalities. Although the SASA has limitations as seen in the evaluative analysis, it is more progressive than its global, continental and regional counterparts reviewed in Chapter 3 in providing recognition and representation as remedies to the cultural and political injustices recognised by the South African Constitution. It should be noted that although its provision of recognition and representation are not fully charged it is at least leaning in the direction of Fraser's 'what' of social justice.

5.4 Implementing the Constitutional Promise: A Look at the NNSSF

It should be noted for the purposes of this research report, when I refer to the NNSSF, I am referring to the "NNSSF (1998) later amended in (2006)" because what the 1998 version did was to lay the groundwork for the funding models – the quintile ranking system of schools, the per-learner allocation, the fee-paying policy and the fee-exemption policy. However, we see the detailed provisions of these funding models in the 2006 version. Moreover, the 2006 amended version of the NNSSF formally introduced the no-fee policy. It was provided for in Section 35 of the SASA. Mestry and Berry (2016) remind us that the purpose of the NNSSF "is to improve the quality and availability of educational opportunities and resources for all learners that have been deprived of quality education for decades due to the discriminatory racial laws of apartheid" (p. 83). In paragraph 98 of the NNSSF, the policy rationale provides a clear explanation of the reason behind its implementation in post-apartheid South Africa. In its explanation, the education policy takes a strong pro-poor stance through the per-learner funding formula which plays a role in promoting fairness, effective use of necessary school resources and access to quality education. This satisfies the promises found in Section 35 of the SASA. While doing so, it also affirms the existence of the real-world limitations to its implementation. For example, it mentions that the "social conditions and school conditions are massively unequal, provincial administrations and SGBs have widely varying capacities, and provincial governments have different fiscal competencies" (Fiske & Ladd, 2004, p. 193).

5.4.1 The Quintile Ranking System

The quintile ranking system is one of the funding models used in post-apartheid South Africa to divide schools into five categories well known as quintiles. For the purpose of identifying the previously disadvantaged and the previously advantaged, the grouping of schools into quintiles is addressed by the poverty ranking. Quintile 1, 2, and 3 schools are not allowed to

charge fees, and they are known as no-fee schools while those that are referred to as Quintile 4 and 5 schools are allowed to charge fees and they are known as fee-paying schools (White & van Dyk, 2019). Given this categorisation, the schools in Quintiles 1, 2 and 3 receive a high amount of funding from the state which they do not have to supplement by charging additional fees from the learners' parents, while schools in Quintiles 4 and 5 receive a low amount of funding from the state which they supplement by charging school fees (White & van Dyk, 2019). The quintile ranking system shows post-apartheid South African government's plan to correct past inequalities by giving more funding to previously disadvantaged schools and less to previously advantaged ones. The goal is to make sure all public schools receive fair funding so that every school has a better chance to offer quality education to all learners.

5.4.2 The Per-Learner Allocation Model

This section considers the introduction of the per-learner allocation model. Paragraph 99 of the NNSSF sets out the practical mechanism which post-apartheid South African government uses to fulfil its commitment to transform the education system through redistribution. The NNSSF states that the allocation of school recurrent cost items should be based on the need of the schools – this need is determined by “the condition of the school and the relative poverty of the school community, using the resource targeting table”⁴² (Department of Education, 1998, Resource Targeting Table). The resource targeting table⁴³ represents the per-learner amount that the provinces must allocate to schools in each quintile for the purposes of covering the non-capital and non-personnel costs. The allocation is calculated by multiplying⁴⁴ the per-

⁴² Paragraph 100 of the NNSSF points out that “each PED is required to produce a ‘resource targeting list’ of all schools in its province, sorted on the conditions at the school and the poverty of the community served by the school, [to] produce five groups of schools. These will correspond to the ‘school quintiles, from poorest to least poor’ in column 1 of the table. Resource allocation will be based on this list” (Department of Education, 1998, p. 28).

⁴³ Paragraph 101 of the National Norms and Standards for School Funding (NNSSF) (1998) later amended in (2006) points out that “the resource targeting list will comprise all ordinary public schools in the province sorted by ‘need’ or ‘poverty’. Two equally weighted factors will be used to rank the schools: (a) The physical condition, facilities and crowding of the school. Using the School Register of Needs data, provincial education departments may create indices based on the range of physical facilities at the school, learner: classroom ratio, the overall condition and need for repairs, availability of basic services. This factor is weighted 50%; and (b) The relative poverty of the community around the school. Using Census, household survey or other data, provincial education departments may create indices based on, for example, the proportion of households with electricity and piped water in the community served by the school, the level of education of the parents served by the school, and other similar criteria. This factor is weighted 50%” (Department of Education, 1998, p. 28).

⁴⁴ Paragraph 102 of the National Norms and Standards for School Funding (NNSSF) (1998) later amended in (2006) points out that “having listed the schools in rank order, PEDs must then divide the list in five quintiles, from poorest to least poor. The distribution by quintile will determine the per learner allocation, in terms of the Resource Targeting Table above. Thus, allocations will be made on a variable per learner basis that favours the poorer segments

learner amount by the school's enrolment. The annual increase of the per-learner allocations is announced in the Government Gazette that is published annually and is determined by the Department of Basic Education (DBE). The amendments published from 2006, 2008, 2009⁴⁵, 2012, 2014⁴⁶, 2015⁴⁷, 2017⁴⁸, 2020⁴⁹, 2021⁵⁰, 2022⁵¹, 2024⁵², and 2025⁵³ show the redistributive nature of the education policy. During these years, the largest annual increases of school funds were directed to the schools serving the low socioeconomic communities.

5.4.3 The School Fees Policy

This section looks at the implementation of the school fee policy and the related fee-exemption policy. These two policies work together: the fee-paying policy allows certain schools the freedom to charge school fees, but to prevent this from becoming a financial barrier for some

of the population. The neediest and largest schools will get priority in funding" (Department of Education, 1998, p. 29).

⁴⁵ "In terms of paragraph 110 of the NNSSF, the National Targets Table published in Government Gazette No. 31498 Government Notice No. 1089, of 17 October 2008 is hereby updated below. The no-fee threshold will be R784 in 2010" (Department of Basic Education, 2008, p. 4).

⁴⁶ "In terms of paragraph 110 of the NNSSF, the National Targets Table published in Government Gazette No. 36222 Government Notice No. 166, of 08 March 2013 is hereby updated to include 2016 target amounts. The no-fee threshold will be R1,059 in 2014, R1,116 in 2015, and R1, 175 in 2016" (Department of Basic Education, 2013, p. 2).

⁴⁷ "In terms of paragraph 110 of the NNSSF, the National Targets Table published in Government Gazette No. 37230 Government Notice No. 12, of 17 January 2014 is hereby updated to include 2017 target amounts. The no-fee threshold will be R1,116 in 2015, R1,177 in 2016, and R1, 242 in 2017" (Department of Basic Education, 2014, p. 2).

⁴⁸ "In terms of paragraph 110 of the NNSSF, the National Targets Table published in Government Gazette No. 40065 Government Notice No. 718, of 10 June 2016 is hereby updated to include 2019 target amounts. The no-fee threshold will be R1,243 in 2017, R1,316 in 2018, and R1, 394 in 2019" (Department of Basic Education, 2016, p. 2).

⁴⁹ "In terms of paragraph 110 of the NNSSF, the National Targets Table published in Government Gazette No. 42445 Government Notice No. 643, of 06 May 2019 is hereby updated to include 2022 target amounts. The no-fee threshold will be R1,466 in 2020, R1,536 in 2021, and R1, 610 in 2022" (Department of Basic Education, 2019, p. 2).

⁵⁰ "In terms of paragraph 110 of the NNSSF, the National Targets Table published in Government Gazette No. 43145 Government Notice No. 366, of 27 March 2020 is hereby updated to retain the 2020 threshold amounts for schools for 202 targets. The no-fee threshold will be R1,466 in 2021, R1,536 in 2022, and R1, 610 in 2023" (Department of Basic Education, 2020, p. 2).

⁵¹ "In terms of paragraph 110 of the NNSSF, the National Targets Table published in Government Gazette No. 45878 Government Notice No. 1730, of 07 February 2022 is hereby updated to include 2025 target amounts. The no-fee threshold will be R1,602 in 2023, R1,672 in 2024, and R1, 748 in 2025" (Department of Basic Education, 2022, p. 2).

⁵² "In paragraph 110 of the NNSSF, the National Targets Table published in Government Gazette No. 47756 Government Notice No. 2874, of 15 December 2022 is hereby updated to include 2026 target amounts. The no-fee threshold will be R1,672 in 2024, R1,754 in 2025, and R1, 836 in 2026" (Department of Basic Education, 2022, p. 2).

⁵³ "In terms of paragraph 110 of the NNSSF, the National Targets Table published in Government Gazette No. 50057 Government Notice No. 2295, of 01 February 2024 is hereby updated to include 2027 target amounts. The no-fee threshold will be R1,754 in 2025, R1,835 in 2026, and R1, 919 in 2027" (Department of Basic Education, 2024, p. 2).

learners, the fee-exemption policy was introduced. The ‘fee-exemption’ refers to the event that a learner’s parents cannot pay fees at a fee-paying school because their combined income is below a set threshold. The parents can then claim total or partial exemption from paying fees. Given the fact that school fee payment is a highly contentious issue, the legislation of the fee-paying policy is accompanied by the fee-exemption policy to ensure that the learners that are unable to pay the school fees are not excluded as that would violate their right to education. Since the fee-exemptions apply only to fee-paying schools, in theory, fee-exemptions permit learners from households that are unable to pay school fees to attend fee-paying schools. The fee-exemption policy targets two groups of children. First, orphaned and abandoned children receive automatic exemption. Second, children whose parents receive poverty-related social grants may qualify for exemption but must apply for the schools to determine whether they will be granted a full⁵⁴ exemption, partial⁵⁵ exemption, no⁵⁶ exemption, conditional⁵⁷ exemption or other considerations based on a set formula. Moreover, it should be noted that the amended NNSSF includes a new paragraph – paragraph 170A⁵⁸ – pertaining to arrangements for ensuring that fee-paying schools are compensated for the exemptions they award every year.

This section considers the no-fee policy that was implemented in the amended NNSSF as a redistributive school funding model for the purposes of remedying existing economic barriers in post-apartheid South African education system. The amended NNSSF implemented in 2006

⁵⁴ On the one hand, paragraph 129 mandates that “Subject to Regulation 5(4), if the combined annual gross income of the parents is less than 10 times (10X) the annual school fees per learner, the parent qualifies for full exemption” (Department of Education, 1998, p. 34); and on the other hand, paragraph 130 mandates that “a person who has the responsibility of a parent of a learner placed in a foster home, foster care or a place of safety, qualifies for full exemption” (Department of Education, 1998, p. 34).

⁵⁵ On the one hand, paragraph 131 mandates that “Subject to Regulation 5(4), if the combined annual gross income of the parents is less than 30 times (30X) but more than 10 times (10X) the annual school fees per learner, the parent qualifies for partial exemption” (Department of Education, 1998, p. 34); and on the other hand, paragraph 132 mandates that “Partial exemption may be granted on a sliding scale. The criteria for applying the scale of partial exemptions must be determined by the parents at the general meeting referred to in section 38(2) of the Act, or by the governing body of the school if the general meeting of parents so decides. Such criteria could be intermediate income multiples between 30X and 10X. Thus, for example, 50% exemption could apply at the 20X mark” (Department of Education, 1998, p. 35).

⁵⁶ Paragraph 133 mandates that “Subject to Regulation 5(4), if the combined annual gross income of the parents is more than 30 times (30X) the annual school fees per learner, the parent does not qualify for exemption” (Department of Education, 1998, p. 35).

⁵⁷ Paragraph 133 mandates that “The criteria for making a conditional exemption must be related to special circumstances affecting a parent's ability to pay the fee, or to the need to acquire relevant information about a parent's circumstances” (Department of Education, 1998, p. 35).

⁵⁸ In paragraph 170A (a) the National Norms and Standards for School Funding (NNSSF) (2006) points out that “A PED will determine an allocation for compensation for fee exemption to fee paying schools for each financial year” (Department of Education, 2006, p. 29).

mandated a new funding policy, namely, the no-fee schools policy. The no-fee schools policy led to 40% of post-apartheid South African schools being granted the no-fee status. The aim of the no-fee schools policy is directed towards eliminating the economic barriers obstructing the right to quality education by ensuring that schools that serve low socioeconomic communities receive increased per-learner funding. It should be noted that the newly introduced no-fee schools policy relies heavily on a national poverty-ranking system where post-apartheid schools are divided into quintiles. More importantly, the no-fee schools policy is representative of an approach that upholds pro-poor and spatial target ideals.

5.4.4 Evaluating the NNSSF: Redistribution, Recognition and Representation in Focus

In this section, I argue that the NNSSF shows a clear intention to support social justice. Its goal is to fix the unfair distribution of resources in post-apartheid South African education system through funding models based on redistribution. Section 5.3 explains how the NNSSF uses tools like the quintile ranking system, per-learner funding, fee-paying and fee-exemption policies, and the no-fee schools policy to identify and support schools that were economically disadvantaged in the past. Together, these measures show that the NNSSF aims to help those most in need, aligning with Fraser's (2008, 2009) idea of redistribution as a response to social injustice. However, these efforts also have unintended effects that move away from social justice. These negative outcomes, which ultimately weaken the NNSSF's justice goals, are discussed in detail in Chapter 6.

5.4.5 Theoretical Reflections on the NNSSF

In this section I present the evaluation of the NNSSF, the theoretical framework in Chapter 4 and the literature review on school funding from the global, continental and regional perspectives. The discussion focuses on whether their decided redistribution approaches genuinely dismantle the inherited legacies of inequalities or merely ameliorate their symptoms. The NNSSF was implemented to ensure that the SASA post-apartheid school funding intentions were operationalised and was intended as a redistributive instrument to ensure that it does away with the legacies of apartheid by using poverty-rankings and quintiles to allocate public school resources.

Firstly, the global literature shows us that the Brazilian FUNDEF and FUNDEB were intended as a needs-driven approach to ensure that they did away with historical marginalization of learners based on school funding. This intention was ensured using enrolment-weighted

formulas to allocate public school resources. Secondly, I reviewed the continental literature on the Ghanaian FCUBE, the FSHS, and the CG. The FCUBE policy was created to remove economic barriers to primary education in Ghana. It aimed to do this by ending school fees and providing capitation grants for primary schools. The FSHS policy was introduced later to build on FCUBE's impact. It focused on removing the economic barriers that remained, even after FCUBE, by expanding free access to secondary education. This was a step forward from FCUBE, which focused on primary education only.

Lastly, the regional literature review focused on the Zimbabwean BEAM and the ETF. The BEAM was intended as a direct response to the persisting economic barrier to access education – by subsidising education for orphans and other vulnerable children. The ETF was intended as a donor-supported initiative whose purpose was to address the economic collapse and severe underfunding that directly affected the Zimbabwean education system. The intention was to provide learning materials and personnel to historically marginalised schools. The ETF is an example of how Zimbabwe has struggled to carry out a government-led strategy for real change. Instead of breaking the cycle of dependency that helped create inequality in the first place, the ETF risks reinforcing that same cycle.

Based on the language used and the intended purposes observable in all the funding policies from the global, continental, regional and the local South African perspectives it is evident that they all lean towards the 'what' of social justice as defined by Fraser (2008) through redistribution for the purposes of addressing the inherited economic disadvantages pertaining to education. It is evident that all the policies have been constrained by deep rooted legacies of structural inequalities which have prevented all policies from reaching their goal of transforming the education system for the historically marginalised.

It should be noted that the NNSSF, the FUNDEF, the FUNDEB, the FCUBE, the FSHS, the CG, the BEAM and the ETF intentionally offer redistributive justice. However, they do so in a way that is unintentionally resource-stretched and symbolic rather than bringing about an actual transformation of the education system. Therefore, I argue that all the funding policies share a common unintended weakness: they fail to fully ensure that funding provided to schools leads to improved quality of education. This results in a gap between the money schools receive and the education they deliver.

To expand on this, none of these policies ensure that there is an explicit and measurable outcome of the funding that they provide to public schools. This means that all policies do not

adequately connect the funding inputs they provide to public schools with the outputs which would involve quality education, particularly for historically marginalised learners. To expand on this, the trend observed in all the funding policies from the global, continental, regional and local perspective is that the policies only relate to the one side of the quality education coin – which is all about the inputs – and thereby do not relate to the other side of the coin of quality education – which is all about the outputs. As explained in Chapter 1, the concept of quality education has two sides. One side focuses on inputs, which include the broad range of resources put into the education system. The other side focuses on outputs, which refer to the results or outcomes that come from the same system.

The trend seen across all funding policies – from global to local – shows a strong focus on inputs, such as resources given to schools. As a result, there is a heavy expectation that these inputs alone will lead to better outcomes, and therefore, to quality education. However, this approach creates a clear gap between efforts to redistribute resources and efforts to improve actual educational outcomes, and current funding policies may be contributing to the continued inequality between lower quintile (previously disadvantaged) and higher quintile (previously advantaged) schools in post-apartheid South Africa.

Furthermore, these policies mostly focus on the economic side of justice through redistribution, but they pay little attention to the cultural and political dimensions. This narrow focus limits their overall ability to promote full social justice.

In conclusion, the dialogue between evaluative analysis of the NNSSF, the two-fold theoretical framework in Chapter 4 and the literature review regarding school funding from the global, continental and regional perspectives reveals that most of these school funding models symbolically adopt the social justice mandate but fall short in embracing it practically. Although the NNSSF does support the social justice mandate in practice – mainly through its focus on economic redistribution via the school funding formula, the no-fee schools policy, the fee-exemption policy, and the fee-paying schools policy – its efforts are limited by the lasting effects of apartheid. These historical inequalities turn its goal of redistribution into a system that continues to divide schools into two levels of quality education, as discussed in the evaluative analysis.

As a result, the NNSSF contributes to social injustice because it has not been able to fully break away from the legacy of apartheid. It also shares similar limitations in redistribution with the global, continental, and regional funding models reviewed in Chapter 3. While its efforts in

recognition and representation are not fully developed, it does show a strong move toward Fraser's idea of the 'what' of social justice.

5.5 Conclusion

In this chapter, I critically evaluated post-apartheid South African school funding policies aimed at improving the provision of quality education from a local perspective. The critical evaluation showed that there is a gap in the funding policies which fail to integrate both redistribution and provision of quality education in their mandates.

CHAPTER 6: OBSERVED DEFERMENT OF EDUCATIONAL JUSTICE: HOW POST-APARTHEID SOUTH AFRICAN FUNDING POLICIES MAINTAIN THE TWO-TIER EDUCATION SYSTEM

6.1 Introduction

The aim of this chapter is to advance my contention that is developed in Chapter 5, which is that the uniform school funding model serves only to ameliorate the symptoms of apartheid inequalities in schools and their ability to produce quality education rather than addressing the persistent inherited apartheid education inequalities head on. In the first section, my argument is that the South African Constitution leans towards social justice through its recognition of the educational injustices – maldistribution, misrecognition and misrepresentation. However, it needs to be accompanied by a measure that holds any education policy that deviates from its mandate. In the second and third section, my argument is that although the SASA and the NNSSF lean towards social justice through their legislated redistribution, recognition and representation remedies, they are characterised by aspects that perpetuate the two-tier education system inherited from the South African apartheid era. Ultimately, the contribution that this chapter seeks to make is that there is a need for a comprehensive policy review – one that goes beyond the symbolic intent and directly addresses the inherited apartheid inequalities in post-apartheid South African education system.

6.2 The Right to Education Undermined: Constitutional Promise Unfulfilled in Education

In Chapter 5, it became clear that the Bill of Rights in the South African Constitution includes education as an inalienable right. Therefore, any constraints that restrict the right to education does not fulfil the South African Constitution's (1996) obligation to social justice. To better understand why post-apartheid South African policies may appear to limit the unconditional right to education, two key aspects should be considered. The first aspect is that school funding decisions are guided more by the limits of the national budget than by the constitutional commitment to provide education as an inalienable right. The current funding model operates on the assumption that resources for education are limited. As a result, decisions about funding are made within the financial constraints of the national budget. This approach suggests that post-apartheid funding policies only follow the constitutional obligation to provide education for all in a superficial way, because budget limitations ultimately determine how much support is given. This is supported by Roux (2003) in pointing out that "[t]he constitution does not say

that South Africa's macro-economic strategy is the supreme law of the republic, and everything that government does must necessarily fall in line with this strategy". My arguments and analysis go in line with what Ahmed and Sayed (2009) have found in their study, which states that:

"The arguments and evidence reviewed suggest that instead of a policy structuring device as claimed, it appears more likely, that the 'state has used rights discourse to shape up its ailing legitimacy as an agent of pro-poor change, while conditioning the specific right in play to fit in with its pre-existing policy choices' (Wilson 2004, 446). Like Jansen (2004), he argues that this 're-definition' serves as a rhetorical and symbolic device, rather than (as claimed) a policy structuring device" (Ahmed & Sayed, 2009, p. 212).

Post-apartheid South Africa has shown strong commitment to ensuring that all public schools – whether previously advantaged or disadvantaged – provide quality education to all children. Therefore, it is equally important to take accountability seriously when there are obstacles that prevent the delivery of quality education. When the government or related structures, such as the South African Schools Act (SASA) and the Norms and Standards for School Funding (NNSF), continue to allow unequal access to quality education, they may be violating the constitutional right to education. Such violations should be seen as a warning that existing policies are not fully effective. This should lead to actions such as reviewing or even abolishing the measures that are failing to dismantle this enduring divide.

6.3 Decentralisation or Disempowerment? Reassessing the South African Schools Act Justice Agenda

In this section, my critical analysis of the SASA which references the evaluative and theoretical analysis in Chapter 5 leads to the evolution of my argument. The critical analysis focuses on the key aspects of the SASA, namely, its decentralisation mandate and its introduction of the SGBs. The SASA takes its lead from the South African Constitution's Section 29. The following interpretation is based on the fact that the SASA clearly aims to ensure the right to education is realised in post-apartheid South Africa. Based on this interpretation, when examining the provisions related to the decentralisation of school funding and the governance role of School Governing Bodies (SGBs), it can be concluded that the right to education is intended to be fully protected and accessible. This conclusion is supported by the fact that these provisions aim to address past educational inequalities experienced by historically

marginalised groups, despite the continuation of the fee-paying schools policy after apartheid. However, based on the evaluative and theoretical analysis of SASA in Chapter 5, I argue that the current education policy and its funding models do not go far enough in dismantling the inherited structurally unequal system, particularly regarding schools' ability to offer quality education.

In this section, I argue that the SASA leans away from social justice by demonstrating how its decentralisation mandate – specifically through the introduction of SGBs and the implementation of school fees – reinforces the unequal educational system inherited from apartheid. Therefore, I draw from Fraser's social justice theory to show where it meets the social justice mandate and where it falls short in the social justice mandate. At face value, the decentralisation of school funding and governance to SGBs is admirable and function as recognition and representation remedy. However, it is important to note that this recognition comes with unintended outcomes, and these unintended outcomes are that they lean away from social justice. In support of this, the findings of an investigation carried out by Mestry (2016) on democratic governance and devolved decision-making for post-apartheid South African schools were that the decentralisation of school governance resulted in an unintended outcome of perpetuating inequalities among public schools. An important, yet often disregarded factor, is the unequal socioeconomic and spatial legacy of apartheid – where the inherited geographic zones continue to undermine the recognition and representation remedy. The latter is evident when the school decision-making is decentralised to the SGBs without regard for the unequal capacities of school communities. Sayed et al. (2020) capture this very well when they assert that the ability of SGBs “to effectively oversee and administer schools and manage various aspects of non-personnel related funding” (p. 6) is dependent on the socioeconomic status of their school community. It is important to understand that the unequal capacity of School Governing Bodies (SGBs) has led to a systemically stratified education system in South Africa, where student outcomes are strongly influenced by the wealth of the surrounding community. In wealthier communities, schools tend to perform better, while in poorer communities, schools tend to perform worse due to poverty and inequality. Instead of reducing these inequalities, the current form of decentralisation in the SASA may reinforce them. This shows the urgent need for a more thoughtful and fairer model of educational governance that focuses on reducing inequality.

Furthermore, in the decentralised governance model established through SGBs I have observed what Sayed et al. (2020) have also observed. This observation pertains to the fact that the SGBs

do not only mirror but also exacerbate “the societal divides of inequality and [reflect] a bifurcated education system” (Sayed et al., 2020, p. 9). I recommend their recommendations for a system that aims to prevent SGBs from continuing to reinforce the divided education system in post-apartheid South Africa. The system involves skimming off “15% of every additional South African rand raised by governing bodies that choose to administer user fees” (Sayed et al., 2020, p. 9) to ensure that every local cluster of schools has a development fund known as a redress fund. Sayed et al. (2020) mention that “this proposal is a form of taxing historical privileges which is also a strong form of Fraser’s notion of redistribution.” (p. 9). This proposal is not merely administrative – it represents a deliberate effort to confront historical privilege and redistribute opportunity. It functions as a form of taxing inherited advantage, a concept that aligns closely with Fraser’s commitment to redistributive justice as well as the critical theory insights of Higgs and Letseka (2021), who caution against superficial reforms that leave deeper structures of inequality intact. Implementing such a system would be a step toward dismantling the illusion of equality and moving toward a more substantively just education system – one that acknowledges how history shapes the present, and designs policy to transform rather than accommodate structural injustice.

6.4 The NNSSF in Crisis: Funding Models That Sustain Inequality

In this section, my critical analysis of the NNSSF which references the evaluative and theoretical analysis in Chapter 5 leads to the evolution of my argument. The critical analysis focuses on the key aspects of the NNSSF, namely, the school funding allocation formula, the no-fee schools policy, the fee-exemption policy and the fee-paying schools policy that are all tied with quintile ranking system of schools. The reason for this focus is to reveal that the school funding models that come with the NNSSF have unintended consequences that perpetuate rather than fully address the inherited apartheid inequalities pertaining to the provision of quality education. Based on the evaluative and theoretical analysis of the NNSSF, my argument is that the education policy falls short in dismantling the inherited structurally divided education system that persists in post-apartheid South African education system. It should be noted that my critical analysis and argument are grounded on the ‘what’ of social justice by Fraser (2008, 2009) and critical theory by Higgs and Letseka (2021) where the focus is on the ‘why’ of that which we observe in the ‘what’ we have done so far in post-apartheid South Africa, particularly its failure.

6.4.1 The Per-Learner Allocation Model

To begin with, my critical analysis of the NNSSF per-learner allocation model supports the argument that, although the model was designed as a redistributive measure to address school funding inequalities inherited from apartheid, its unintended outcomes show that systemic inequalities still exist. These ongoing inequalities limit the model's effectiveness in correcting economic injustices in post-apartheid South African education. A key flaw in the government's school funding formula lies in its reliance on the socioeconomic status of the surrounding community rather than the actual needs or demographics of the school itself. While using community-based data has had some positive effects, it also reinforces apartheid-era inequalities and results in the misallocation of resources. Therefore, I am in support of Mestry and Ndhlovu (2014, p. 10) when they recommend that "schools should be funded based on their essential needs and the socioeconomic status of parents attending the school rather than the poverty index of the community where the school is located." Post-apartheid South African government's heavy reliance on the socioeconomic status of the surrounding community in calculating school funding often leads to the neglect of the specific needs and challenges faced by individual schools.

An example of this can be observed when considering that a school termed a quintile 4 or 5 school may be characterised by the high enrolment of learners who come from low socioeconomic backgrounds but continue to be funded at a lower level by the government based on their location which is characterised as wealthier. In contrast, the approach involving the actual demographic of the school would provide an accurate school-funding allocation. Given this, my argument is that post-apartheid South African government needs to review the current school funding allocation calculation to ensure that it prioritises the actual demographic of schools. The previous discussion leads to another aspect of the school funding allocation, which includes a clause that provides funding based on the presence of individual poor learners – regardless of whether they attend a lower-quintile school in a rural area or a higher-quintile school in a more developed area.

A radical shift in how school funding is calculated is needed; I advocate for a completely different approach. My proposal is a completely different approach to school funding that introduces a needs-weighted per-learner formula. While the NNSSF funding model – the per-learner allocation – intends to redistribute educational resources based on socioeconomic need (as discussed in Chapter 5), it also has unintended consequences that detract from its purpose.

From a critical theory perspective, allocating funds based on the socioeconomic status of a school's community and finalizing this allocation based solely on learner enrolment constitutes a one-size-fits-all approach. This method fails to contextualize funding and perpetuates existing disparities between schools.

6.4.2 The Fee-Paying Policy

Next, my critical analysis of the NNSSF fee-paying policy supports the argument that, although the policy was introduced as a redistributive measure to address school funding inequalities inherited from apartheid, it has produced unintended outcomes that reveal the continued presence of systemic inequalities. These outcomes limit the policy's ability to address economic injustice in post-apartheid South African education. This becomes clear when the policy shifts the responsibility for providing quality education from the government to parents, effectively turning education into a commodity. Furthermore, the NNSSF's classification of schools in Quintiles 1–3 as no-fee schools and Quintiles 4–5 as fee-paying schools reinforces a flawed narrative, making the issue of school fees seem unproblematic in post-apartheid context, despite its impact on access to quality education. The fee-paying policy in wealthier schools appears unproblematic because the NNSSF's redistributive approach creates the impression of fulfilling a social justice mandate. In pursuit of maintaining quality education, wealthier Quintile 4 and 5 schools have exploited the autonomy afforded by SASA, raising fees to compensate for the government's minimal funding. As a result, post-apartheid South African parents face a stark reality whereby they have no choice but to accept the raised school fees⁵⁹ if they want their children to receive good quality education. Here, we observe the persisting class-based inequalities – because only wealthier parents can pay for good quality education for their children. Moreover, schools that can charge higher fees tend to benefit only wealthy and middle-class parents, giving their children access to better quality education.

It is important to recognise that the ongoing debates about allowing schools in post-apartheid South Africa to charge fees are significant, as they offer a necessary critique of the fee-paying schools policy. This policy has features that weaken the right to quality public education. By allowing schools to charge fees, the policy creates a risk of moving toward the privatisation of

⁵⁹ Buys, du Plessis and Mestry (2020, p. 15) in their study found that the principals of the fee-paying schools admit that delivering quality education without the charging of school fees is impossible by pointing that “without private funding, half of what we do at the school will not be possible. Every year, millions of rand come from school fees, paid out of the pockets of parents.”

public education, which turns education into a commodity – something that should remain the responsibility of the government.

Privatisation of education is strongly opposed by those who view education as a public good and a basic right for all, including myself. The concern is that turning education into a commodity undermines the idea that it should be freely and equally available to everyone. While the policy of charging school fees is justified to address the inequalities left by apartheid, in practice, it continues to support a socially stratified education system. This shows that, despite good intentions, the government's funding policies may unintentionally maintain the very inequalities they aim to eliminate. Permitting wealthier schools to charge school fees serves as regressive measure as it exacerbates the legacy of apartheid inequalities. It indicates that post-apartheid South African government's decision to allow wealthy parents to pay for⁶⁰ quality education for their children results in devolving the responsibility for the provision of quality education to all its citizens regardless of what their socioeconomic standing is. As a result, the no-fee schools policy is left for those who cannot afford to pay, creating a divide. This trickle-down approach to transformation ultimately reinforces the apartheid-era socially stratified structure, where access to quality education remains dependent on wealth. Therefore, I propose a review of the fee-paying policy that would require fee-paying schools to contribute a portion of their annually raised funds to nearby no-fee schools.

6.4.3 The Fee-Exemption Policy

My critical analysis of the NNSF fee-exemption policy strengthens my argument that, although the policy was introduced as a redistributive measure to address school funding inequalities inherited from apartheid, its unintended effects show that systemic inequalities remain. These ongoing inequalities limit the policy's ability to fully address economic injustice in post-apartheid South African education. This becomes clear when the policy unintentionally benefits wealthier schools and continues to create economic barriers through complex procedures that result in the misrecognition and political underrepresentation of poorer learners and their families. The fee-exemption policy is designed to redistribute educational resources by easing the financial burden on families from low socioeconomic backgrounds, thereby improving their access to quality education. In this way, the policy reflects the redistributive

⁶⁰ Buys, du Plessis and Mestry (2020, p. 15) found that the principals of the fee-paying schools admit that “additional income from fundraisings, donations and sponsorships is crucial to ensure quality education. More than half of the educators at the school are paid from school fees.”

goals found in Fraser's theory of social justice. However, as Van Dyk and White (2019) argue, "...the application of the exemption formula, although prescribed by government, are influenced by the social/school environment, the SGBs' interpretation of the parents' financial status, and the parents' willingness to apply for exemption", which makes this perspective applicable to the study (p. 5). This highlights that, although the policy appears redistributive in nature, it is still bound to contribute to unintended outcomes that exclude poor learners due to factors such as human discretion, social stigma, and unequal access to information.

6.5 The Application of Critical Theory

The critical theory aspect of the theoretical framework in this research is important because it helps reveal how some structures – like School Governing Bodies (SGBs) – which were introduced to promote equality in education, can contribute to the same inequalities they were meant to eliminate. For example, many parents from low socioeconomic backgrounds do not apply for fee-exemptions due to reasons such as stigma, misinformation, or a lack of understanding about whether they qualify. This shows that the goal of the fee-exemption policy is not fully achieved.

It is important to recognise that these issues partly arise because post-apartheid South African government struggles to reimburse fee-paying schools for the exemptions they grant to learners from disadvantaged backgrounds. This results in a financial loss for schools whenever they approve full, partial, or conditional exemptions. As a result, a conflict of interest develops between SGBs and parents from low-income communities. On one hand, SGBs are responsible for raising enough money to supplement government funding. On the other hand, they are also expected to fairly grant fee-exemptions to eligible parents. This dual responsibility puts pressure on SGBs, making it more likely that they prioritise generating revenue over granting exemptions, which further undermines the purpose of the policy.

Sayed and Motala (2012) explain that there exists "potential loss of school revenue due to exempting learners creates a disincentive for schools to inform parents of this right, since schools do not receive any compensatory funding for exempted learners" (p. 684). This shows that economic concerns at the school level often have a strong influence and may "overrule the redistributive intentions of the fee-exemption policy" (Sayed & Motala, 2012, p. 684). As a result, the goals of post-apartheid South African redistributive policy are weakened by the continued impact of apartheid-era economic inequalities within the education system. In the end, only a small number of fee-exemptions are likely to be granted to parents from low

socioeconomic backgrounds. This continues to create economic barriers to quality education in wealthier schools and shows that the fee-exemption policy is not achieving its intended purpose. Therefore, I propose a review of the fee-exemption policy that introduces a digitized application process. This would address the lack of information faced by parents and reduce schools' incentive to prioritize revenue over granting exemptions.

Lastly, although the NNSSF no-fee policy was introduced as a redistributive measure to address school funding inequalities inherited from apartheid, its unintended consequences show that deep-rooted systemic inequalities still exist. These ongoing inequalities limit the policy's ability to fully correct economic injustices in post-apartheid South African education system. In the context of post-apartheid South Africa, it is important to understand that the no-fee schools policy is based on a pro-poor funding approach. This approach is meant to support redistribution by giving more government funding to lower-quintile schools (which serve poorer communities) while reducing funding for wealthier schools. This reflects the intended goal of promoting equity through targeted support. However, despite this intention, the policy still faces challenges in achieving its full redistributive impact.

Despite this, I argue that the no-fee schools policy is characterised by a misguided attempt at ensuring redistributive justice in post-apartheid South African schools. This argument is strengthened by the fact that the no-fee schools policy is flawed, as it creates a situation where wealthier schools continue to benefit, resulting in a perverse incentive that preserves their existing privilege.

Reschovsky (2006:37) critiques the no-fee schools policy, arguing that beneath the sensible intended purposes of the no-fee policy there is a complex web of problems that lead to it being an undesirable option for post-apartheid South African education system. In concurring with Reschovsky (2006:37), I argue that the no-fee schools policy comes with unintended consequences which outweigh its intended purposes. Therefore, a more nuanced evaluation of its merits that leads to its improvement is needed. The abolition of school fees may lead to a decline in the quality of education provided by the schools designated as no-fee schools. Moreover, the no-fee policy presents us with a stark demonstration of how policy documents can lead to a perpetuation of the legacy of apartheid inequalities – this is seen when the decline of quality education offered by the no-fee schools leads the wealthy parents to move their children to private schools. It should be noted that an unintended consequence of the abolition of fees is a surge in learner enrolment, which indicates increased access. However, the

increased access results in overcrowding and an unfavourable learner-teacher ratio which creates an unsustainable burden on no-fee schools. The failure to meet the demands leads to a decline in the quality education provided by these schools – perpetuating the legacy of apartheid inequalities whereby under-resourced schools provided poor-quality education. Moreover, unsustainable demands on the no-fee schools leads to some schools resorting to the imposition of certain school related fees – for example, text-book fees – which in turn serves as an exclusionary measure which should not exist in the first place. No-fee schools are faced with a crippling experience considering that they have a huge reliance on post-apartheid South African government funding which proves to be insufficient. The chronic insufficient government funding has a devastating impact on the no-fee schools’ ability to provide quality education⁶¹. It is, therefore, important to emphasise my envisioned review of the no-fee policy, which involves ensuring that the annual increase of school allocation funds from the South African government is in line with inflation.

6.6 Conclusion

In this chapter, I have articulated the recommendations for getting from where we are (the persisting two-tier education system) to where we ought to be (the dismantled two-tier education system). The recommendations target the elements of the South African Constitution, the SASA and the NNSSF that unintentionally perpetuate the structurally unequal education system. These recommendations suggest revisions that must be made to eliminate this inherited hierarchical structure even at the wake of their implementation. Moreover, I have argued for critical and targeted policy revisions – rooted in the principles of recognition, redistribution and representation – that are necessary if we are to truly disrupt the ongoing reproduction of a socially stratified education system and realise the transformative vision promised in post-1994 political-era.

⁶¹ Chanee (2020, p. 11) reveals that “the more important aspect of quality performance is lacking in no-fee schools and still needs to be addressed if social justice is to be achieved over time.”

CHAPTER 7: CONCLUSION

In post-apartheid South African context, characterisation of the funding provided to schools as a mere administrative practice is a thing of the past. The reason for this is that the funding provided to schools is understood as a practice that makes the South African Constitution's (1996) promise of the unqualified right to education a reality. It is important to note that the main purpose of post-apartheid South African school funding policies and their funding models is to address the educational inequalities left by apartheid. These policies aim to make sure that previously disadvantaged schools, which serve poor communities, receive enough resources to offer quality education – similar to what previously advantaged schools have had access to for many years. Post-apartheid South African school funding policies and their resultant school funding models are a means to ensure that there is educational justice in a society that experienced apartheid educational injustices. Where are we as South Africa with respect to the education system's provision of quality education? The school-funding policies and their resultant school funding models that are meant to serve post-apartheid South Africa must ensure that their provisions do not overlook the entrenched systemic inequalities. Instead, they must actively dismantle the reality that treats quality education as a geographical and historical privilege, ensuring it becomes a lived reality for all learners. This raises critical questions:

- Have the uniform school funding policies and their resultant school funding models through their noble intent succeeded in dismantling the inherited apartheid-era education system marked by significant disparities in the provision of quality education?
- Do school funding policies and their pro-poor mandate succeed in transforming the targeted schools?
- Have the global, continental, and regional school funding policies positively influenced the national policies to dismantle the disparities in the provision of quality education?
- What does the social justice and critical theories reveal about the uniform school funding models?
- Where are we regarding post-apartheid South African school funding policies?
- Where we ought to be regarding post-apartheid South African school funding policies?

In Chapter 4, I have adopted a two-fold theoretical framework which makes use of Fraser's (2008) social justice theory and Higgs' and Letseka's (2008) critical theory. This theoretical

framework has been valuable in this research report because it helped uncover the systemic and structural inequalities that continue to shape and sustain inequality within the education system. In addition, it made it possible to identify context-sensitive solutions to the ongoing challenges in providing quality education in post-apartheid South African schools. This demonstrates that the theoretical framework is both grounded in theory (abstract-specific) and practical (praxis-specific) in how it analyses and evaluates society.

Building on the theoretical framework's usefulness, this section shows how it was used in this research study.

- First, it was used to evaluate the South African Constitution using the lens of the three dimensions of the 'who' of justice which are useful for a comprehensive evaluation of whether the education policy adheres to the importance of recognising post-apartheid South African educational injustices inherited from the apartheid era.
- Second, it was used to evaluate the SASA using the lens of the three dimensions of the 'what' of social justice which are useful for a comprehensive evaluation of whether the education policy recognises the importance of remedying post-apartheid South African educational injustices observed in the foundational intentions of the South African Constitution through – redistribution, recognition and representation.
- Last, it was used to evaluate the NNSF using the lens of the 'why' of critical theory – this lens allowed me to evaluate the reasons behind the successes and failures of the 'who' and 'what' of social justice considering the courses of action in the NNSF.

The evaluations based on this theoretical framework are revealed in Chapter 5 and 6.

The central argument in this research report is that the uniform school funding policies, particularly the legislated quintile ranking system – though noble in intent – have unintended outcomes that perpetuate the inherited, unequal two-tier education system, marked by significant disparities in the quality of education provided by schools in lower and higher quintiles in post-apartheid South Africa. This argument is reinforced by the observations made in the evaluative and theoretical analyses in Chapter 5 and fully developed in Chapter 6.

In Chapter 5, I evaluated the South African Constitution using the 'who' of social justice and the evaluative analysis has proven that it leans towards social justice through its upholding of recognising historical educational injustices through its provision that supports the right to education. Moreover, I used this evaluative analysis to tie it to the trend observed in the global,

continental and regional perspectives considering the school funding models through a dialogue. The theoretical analysis showed that school funding policies focus mostly on the input side of quality education, such as infrastructure, resources, and teacher numbers, while the output side, like learner performance and educational outcomes, is often overlooked. This imbalance places too much reliance on the idea that good inputs alone will automatically lead to good results. As a result, the provision of quality education is seen mainly as depending on inputs, without enough attention to how well those inputs improve outcomes. This means that for schools that do not have good inputs afforded to them, the provision of quality education for their learners is a pipe dream.

This chapter revealed that there is a gap between the redistributive courses of action and the provision of quality education courses of action in the evaluated global, continental, regional and local perspectives pertaining to the school funding models. This is where we observe that the funding policies in place have perpetuated the disparities between post-apartheid South African lower quintile schools and higher quintile schools in their ability to provide quality education. Moreover, I critically evaluated how the SASA and the NNSSF align with the South African Constitution's commitment to the right to education in post-apartheid South Africa. The evaluation revealed that SASA and the NNSSF do align with the Constitution's commitment to the right to education through their social justice remedies. However, although the social justice remedies are in place, this does not mean they do not have unintended consequences that favour the perpetuation of the inherited apartheid educational system. This discussion is developed fully in Chapter 6.

Building on Chapter 5, in Chapter 6, I highlighted the need for a comprehensive review of post-apartheid South African school funding policies so that we can ensure that the school-funding policies go beyond the symbolic intent and directly addresses the inherited apartheid inequalities in post-apartheid South African education. Despite the intentions of the South African Constitution, the SASA, and the NNSSF to recognise and correct educational injustices, their approaches to addressing the unequal provision of quality education between wealthy and poor schools often end up continuing the same inequalities they aim to eliminate.

In the first section of this chapter, I showed that while the Constitution strongly supports the right to education, there is a need for a clear process to review or abolish any education policy that undermines this right. In the second section, I discussed how the SASA reflects a commitment to social justice through its focus on recognition and representation, especially

through the role of School Governing Bodies (SGBs). In the third section, I examined the NNSSF, which shows a focus on redistribution through mechanisms such as the quintile ranking system, per-learner funding, the fee-paying and fee-exemption policies, and the no-fee schools policy.

However, as shown in both the second and third sections, in the context of post-apartheid South Africa with its deeply rooted apartheid-era inequalities, these measures often fail to produce the intended outcomes. Instead of correcting the system, they end up reinforcing existing inequalities.

The analysis in chapter 5 and 6 present with a stark reality pertaining to the comprehensive review of post-apartheid South African school funding policies being an urgent matter rather than a mere advisable action. To ensure that post-apartheid South Africa transitions from the evidenced reality of the bifurcated education system to the envisioned just education system, I propose the following actionable recommendations. It is imperative to note that these recommendations are in line with the principles of redistribution, recognition, and representation, thereby, aiming to ensure that the school funding policies move beyond their evidenced symbolic intent to transformative action.

Firstly, to address the evidenced systemic inequalities exacerbated by the decentralization of school governance through the SGBs, I propose the legislation of a ‘redress fund.’ This entails introducing a legislation that requires all fee-charging schools to contribute a prescribed percentage of their privately raised funds to a district-level resource redistribution fund. This fund would be used to specifically strengthening the resources and capacity of the neighbouring no-fee schools. This proposed legislation directly taxes historical privilege to enable meaningful redistribution, ensuring that the autonomy afforded to wealthier schools actively contributes to systemic justice rather than entrenching advantage. Secondly, the key model pertaining to the allocation of state funds – the quintile system – must be replaced with a needs-based model. The current community-based poverty ranking system should be replaced by a needs-weighted, demographic-sensitive school funding formula. This new model would base allocations on the actual socioeconomic status of the learners enrolled in each school, not the geographic area, and would be regularly reviewed every three to five years. This ensures that the state funding is accurately targeted and responsive to changing school demographics, preventing the persistent misallocation of resources.

Thirdly, post-apartheid South African state must assert stronger regulatory control over the fee-charging policy and most importantly radically simplify the process pertaining to fee-exemptions. This involves capping school fee increases and creating a centralized, digitized national application system for exemptions. Moreover, managing eligibility and reimbursement at a provincial or national level, the state can remove the disincentive for schools to grant exemptions and eliminate the bureaucratic and stigmatizing barriers that prevent eligible parents from applying. This ensures that the school funding policies are in line with the values of redistribution, recognition and representation thereby ensuring that access to fee-charging schools becomes a reality for poor learners. Finally, the funding baseline for no-fee schools must be secured and inflation-proofed. This means that there must be a legislation in place for the purposes of mandating that annual per-learner allocations for Quintiles 1-3 increase at least in line with inflation. Furthermore, regular, transparent audits must assess the sufficiency of these allocations to cover the real costs of quality education, shifting the focus from inputs to measurable outputs. This is imperative as it would prevent any decrease in funding and thereby breaking the cycle of under-resourcing that results in no-fee schools being subjected to poor educational outcomes.

Together, these set of proposed recommendations represent a coherent strategy to dismantle the underlying structure of the two-tier education system. They demand a shift from a policy framework that ameliorates symptoms to one that directly confronts and transforms the structural inequalities inherited from apartheid, thereby ensuring that the constitutional right to a quality education a lived reality for all South African learners.

This research report reflects the current state of school funding in post-apartheid South Africa. A thorough and comprehensive review of school funding policies is urgently required to ensure that the promise of equitable, quality education becomes a lived reality for all learners in post-apartheid South Africa.

REFERENCES

- Adu-Ababio, K., & Osei, R. D. (2018). Effects of an education reform on household poverty and inequality: A microsimulation analysis on the free senior high school policy in Ghana (No. 2018/147). WIDER Working Paper. UNU-WIDER.
<https://doi.org/10.35188/UNU-WIDER/2018/622-1>
- Ahmed, R., & Sayed, Y. (2009). Promoting access and enhancing education opportunities? The case of 'no-fee schools' in South Africa. *Compare*, 39(2), 203–218.
<https://doi.org/10.1080/03057920902750353>
- Aina, A. Y., & Bipath, K. (2020). School financial management: Insights for decision making in public primary schools. *South African Journal of Education*, 40(4), 1–10.
<https://doi.org/10.15700/saje.v40n4a2046>
- Akyeampong, K. (2009). Public–private partnership in the provision of basic education in Ghana: Challenges and choices. *Compare*, 39(2), 135–149.
<https://doi.org/10.1080/03057920902750304>
- Alexander, R. (2008). Education for all, the quality imperative and the problem of pedagogy (Research Monograph No. 20). CREATE Pathways to Access. University of Sussex.
<http://sro.sussex.ac.uk/id/eprint/1866>
- Arendse, L. (2011). The obligation to provide free basic education in South Africa: An international law perspective. *Potchefstroom Electronic Law Journal*, 14(6), 97–127.
<https://doi.org/10.4314/pelj.v14i6.5>
- Ball, S. J. (2021). The education debates. Policy Press. <https://doi.org/10.2307/j.ctv1mjqtw3>
- Boakye, B. A. (2019). Explaining education reforms in Ghana: An institutional and ideational perspective (Doctoral dissertation, University of Saskatchewan). University of Saskatchewan Research Archive. <https://harvest.usask.ca/items/e4831da2-6f2f-47ff->

- Boonstoppel, E., & Chikohomero, R. (2011). School development committee capacity reinforcement project in Zimbabwe. SNV Netherlands Development Organisation.
- Brincat, S. (2012). On the methods of critical theory: Advancing the project of emancipation beyond the early Frankfurt School. *International Relations*, 26(2), 218–245.
<https://doi.org/10.1177/0047117812436810>
- Bruce, C. S. (1994). Research students' early experiences of the dissertation literature review. *Studies in Higher Education*, 19(2), 217–229.
<https://doi.org/10.1080/03075079412331382057>
- Buys, M., du Plessis, P., & Mestry, R. (2020). The resourcefulness of school governing bodies in fundraising: Implications for the provision of quality education. *South African Journal of Education*, 40(4), 1–10. <https://doi.org/10.15700/saje.v40n4a1912>
- Chanee, A. (2020). Narrowing the achievement gap of Grade 12 in no-fee schools in Gauteng using pro-poor funding. *South African Journal of Education*, 40(4), 1–10.
<https://doi.org/10.15700/saje.v40n4a1948>
- Chanimbe, T., & Dankwah, K. O. (2021). The ‘new’ free senior high school policy in Ghana: Emergent issues and challenges of implementation in schools. *Interchange*, 52(4), 599–630. <https://doi.org/10.1007/s10780-021-09446-2>
- Chetty, R. (2019). Literacy teaching in disadvantaged South African schools. *Literacy*, 53(4), 245–253. <https://doi.org/10.1111/lit.12172>
- Chikohomero, R. (n.d.). Cohesive and coherent education bureaucracy system in Zimbabwe (Master’s thesis, University of Cape Town). University of Cape Town.
https://commerce.uct.ac.za/sites/default/files/content_migration/commerce_uct_ac_za/470/files/Ringisai%2520%252005%2520August.pdf

- Chikoko, V., & Mthembu, P. (2020). Financing primary and secondary education in sub-Saharan Africa: A systematic review of literature. *South African Journal of Education*, 40(4), 1–12. <https://doi.org/10.15700/saje.v40n4a2033>
- Colebatch, H. K. (2009). *Policy* (3rd ed.). McGraw-Hill Education.
<https://doi.org/10.1036/9780070713059>
- De Vos, P. (2001). Substantive equality after Grootboom: The emergence of social and economic context as a guiding value in equality jurisprudence. *Acta Juridica*, 2001(1), 52–67. https://doi.org/10.10520/AJA0065123X_4
- Department of Education. (1998). National Norms and Standards for School Funding. *Government Gazette*, 19347(20867).
- Department of Education. (2006). Amended National Norms and Standards for School Funding. *Government Gazette*, 29466(29656).
- Department of Basic Education. (2008). Amendment of the regulations relating to the minimum uniform norms and standards for public school infrastructure. *Government Gazette*, 31498(31498). <https://share.google/BvV4h6571Vz8hKrTU>
- Department of Basic Education. (2013). Amendment of the regulations relating to the minimum uniform norms and standards for public school infrastructure. *Government Gazette*, 36222, 1–4. <https://share.google/0F4JxT4jcOh9NRMRL>
- Department of Basic Education. (2014). Amendment of the regulations relating to the minimum uniform norms and standards for public school infrastructure. *Government Gazette*, 37230(37230). <https://share.google/CnhsRiLVkLOcKjK6F>
- Department of Basic Education. (2016). Amendment of the regulations relating to the minimum uniform norms and standards for public school infrastructure. *Government Gazette*, 40065(40065).

- Department of Basic Education. (2019). Amendment of the regulations relating to the minimum uniform norms and standards for public school infrastructure. Government Gazette, 42445(42445). <https://share.google/voeNJwmsO5NTsezRW>
- Department of Basic Education. (2020). Amendment of the regulations relating to the minimum uniform norms and standards for public school infrastructure. Government Gazette, 43145(43145). <https://share.google/lSE2iXPwoqDtfqo25>
- Department of Basic Education. (2022). Amendment of the regulations relating to the minimum uniform norms and standards for public school infrastructure. Government Gazette, 45878(45878). <https://share.google/qNxzBywf0uTBMLZC9>
- Department of Basic Education. (2022). Amendment of the regulations relating to the minimum uniform norms and standards for public school infrastructure. Government Gazette, 47756(47756). <https://share.google/8sL6KBIjIbqP2DpOv>
- Department of Basic Education. (2024). Amendment of the regulations relating to the minimum uniform norms and standards for public school infrastructure. Government Gazette, 50057(50057). <https://share.google/tRr0yXY4kWJfpA48i>
- Department of Education. (1998). National Norms and Standards for School Funding. Government Gazette, 19347(20867).
- Dourado, L. F., & de Araújo, W. M. P. (2022). Financiamento da Educação, Fundeb e Direito à Educação: Educação Pública de Qualidade Social e com Gestão Pública [Education funding, FUNDEB and the right to education: Public education of quality and with public management]. *Revista Brasileira de Política e Administração da Educação*, 38(1), 109–131. <https://doi.org/10.21573/vol38n12022.125635>
- Du Plessis, A. (2020). Statutory curtailment of school autonomy: Recent movements on the centralization-decentralization continuum in South African education. In *Proceedings*

- of the Bulgarian Comparative Education Society (p. 210–217). Bulgarian Comparative Education Society. <https://www.cceol.com/search/article-detail?id=937246>
- Dunkel, H. B. (1953). Philosophical approach to research. *The Phi Delta Kappan*, 35(1), 25–28. <https://doi.org/10.1177/003172171103200323>
- Dzikunu, C. K., & Ansah, S. K. (2023). Free Senior High School Programme implementation in Ghana: An assessment. *Ghana Journal of Education and Teaching*, 2(1), 1–15. <https://doi.org/10.10520/ejour-gjet.v2i1>
- Dwomoh, D., Tetteh, J., Otoo, R., Hazlett, C., Godi, A., Amoatey, C., & Tornyevah, L. (2022). The impact of the Free Senior High School Education Policy and double-track system on quality education outcomes: A quasi-experimental policy evaluation study in Ghana. *Africa Education Review*, 19(2), 1–24. <https://doi.org/10.1080/18146627.2020.1856026>
- Emmanuel, O. C. (2019). The challenges, pragmatic justification and more effective ways of implementing the continental education strategy for Africa (2016–2025). *Global Journal of Human-Social Science: G Linguistics & Education*, 19(8), 1–11. <https://doi.org/10.34257/GJHSSCVOL19IS8PG1>
- Fiske, E. B., & Ladd, H. F. (2004). *Elusive equity: Education reform in post-apartheid South Africa*. Brookings Institution Press. <https://doi.org/10.1353/book.3430>
- Fraser, N. (2009). *Scales of justice: Reimagining political space in a globalizing world*. Columbia University Press. <https://doi.org/10.7312/fras14640>
- Fraser, N. (2007). Re-framing justice in a globalizing world. In T. Lovell (Ed.), *(Mis)recognition, social inequality and social justice: Nancy Fraser and Pierre*

- Bourdieu (p. 29–47). Routledge. <https://doi.org/10.4324/9780203961>
- Fraser, N. (2008). Abnormal justice. *Critical Inquiry*, 34(3), 393–422.
<https://doi.org/10.1086/589478>
- Fraser, N., & Honneth, A. (2003). Redistribution or recognition? A political-philosophical exchange. Verso.
- Gerrard, J., Savage, G. C., & O'Connor, K. (2017). Searching for the public: School funding and shifting meanings of 'the public' in Australian education. *Journal of Education Policy*, 32(4), 503–519. <https://doi.org/10.1080/02680939.2016.1263367>
- Gordon, N., & Vegas, E. (2005). Educational finance, equalization, spending, teacher quality, and student outcomes: The case of Brazil's FUNDEF. In *Incentives to improve teaching: Lessons from Latin America* (pp. 5–34). World Bank Publications.
- Government of Ghana. (1992). The Constitution of the Republic of Ghana.
<http://www.judicial.gov.gh/constitution/home.htm>
- Government of Ghana. (1992). Constitution of the Republic of Ghana.
<https://share.google/zzh70iCKRljdx73in>
- Griffiths, T. G. (2021). Education to transform the world: Limits and possibilities in and against the SDGs and ESD. *International Studies in Sociology of Education*, 30(1–2), 73–92. <https://doi.org/10.1080/09620214.2020.1854829>
- Hamm, C. M. (2003). Philosophical issues in education: An introduction. Routledge.
<https://doi.org/10.4324/9780203465160>
- Heneveld, W., & Craig, H. (1996). Schools count: World Bank project designs and the quality of primary education in Sub-Saharan Africa. World Bank Publications.
<https://doi.org/10.1596/0-8213-3664-9>
- Heyns, C., & Brand, D. (1998). Introduction to socio-economic rights in the South African

- constitution. *Law, Democracy & Development*, 2(2), 153–167.
<https://doi.org/10.4314/ldd.v2i2.22381>
- Higgs, P., & Letseka, M. (2021). *Philosophy of education today: An introduction*. Juta and Company (Pty) Ltd. <https://doi.org/10.55463/9781485131415>.
- Horsthemke, K. (2021). *Indigenous knowledge: Philosophical and educational considerations*. Rowman & Littlefield. <https://doi.org/10.46697/001c.22166>
- Jansen, J. D. (2004). Race and education after ten years: Conversations. *Perspectives in Education*, 22(1), 117–128. <https://doi.org/10.38140/pie.v22i1.730>
- Kadziya, L., & Ndebele, C. (2020). Interrogating the role of parents in promoting improved science, technology, engineering and mathematics education in rural day secondary schools in Zimbabwe. *African Journal of Development Studies*, 10(4), 103–118.
<https://doi.org/10.31920/2634-3622/2020/v10n4a6>
- Karlsson, J. (2002). The role of democratic governing bodies in South African schools. *Comparative Education*, 38(3), 327–336.
<https://doi.org/10.1080/0305006022000014151>
- Kumar, K., & Sarangapani, P. M. (2004). History of the quality debate. *Contemporary Education Dialogue*, 2(1), 30–52. <https://doi.org/10.1177/097318490400200103>
- Madani, R. A. (2019). Analysis of educational quality, a goal of education for all policy. *Higher Education Studies*, 9(1), 100–109. <https://doi.org/10.5539/hes.v9n1p100>
- Makoelle, T. M., & Burmistrova, V. (2020). Funding inclusive education for equity and social justice in South African schools. *South African Journal of Education*, 40(4), 1–11.
<https://doi.org/10.15700/saje.v40n4a1856>
- Mathebula, T. (2018). Human rights and neo-liberal education in post-apartheid South Africa. *Journal of Education*, 71, 91–106. <https://doi.org/10.17159/2520-9868/i71a07>

- Mestry, R., & Ndhlovu, R. (2014). The implications of the National Norms and Standards for School Funding policy on equity in South African public schools. *South African Journal of Education*, 34(3), 1–11. <https://doi.org/10.15700/201409161042>
- Mestry, R. (2016). The management of user fees and other fundraising initiatives in self-managing public schools. *South African Journal of Education*, 36(2), 1–11. <https://doi.org/10.15700/saje.v36n2a1237>
- Mestry, R. (2018). The role of governing bodies in the management of financial resources in South African no-fee public schools. *Educational Management Administration & Leadership*, 46(3), 385–400. <https://doi.org/10.1177/1741143216665838>
- Mestry, R. (2020). The effective and efficient management of school fees: Implications for the provision of quality education. *South African Journal of Education*, 40(4), 1–10. <https://doi.org/10.15700/saje.v40n4a1862>
- Mestry, R., & Berry, B. (2016). The perceptions of stakeholders of the implementation of a state funding model in South African public schools. *Africa Education Review*, 13(2), 82–95. <https://doi.org/10.1080/18146627.2016.1224096>
- Mezirow, J. (1990). *Fostering critical reflection in adulthood: A guide to transformative and emancipatory learning*. Jossey-Bass. <https://doi.org/10.1002/ace.36719905008>
- Mncube, V. (2009). The perceptions of parents of their role in the democratic governance of schools in South Africa: Are they on board? *South African Journal of Education*, 29(1), 83–103. <https://doi.org/10.15700/saje.v29n1a230>
- Mohammed, A. R., & Apiung, J. (2025). “We have to charge levies, else we will close down the schools”: Delivering Ghana’s education capitation grant programme within chronic resource constraints. *Educational Review*, 77(1), 254–273. <https://doi.org/10.1080/00131911.2023.2272221>

- Morrow, R. A., & Brown, D. D. (1994). *Critical theory and methodology*. Sage Publications.
<https://doi.org/10.4135/9781412983742>
- Munene, I. I. (2021). Equity and inclusion in education for all: Ensuring all children learn—Lessons from the South on what works in equity and inclusion. In UNESCO Global Education Monitoring Report 2021/2: Non-state actors in education (pp. 9–28). UNESCO. <https://doi.org/10.54676/UZQV8505>
- Poisson, M. (2014). Achieving transparency in pro-poor education incentives. International Institute for Educational Planning.
- Poisson, M. (2014). Achieving transparency in pro-poor education incentives. UNESCO International Institute for Educational Planning (IIEP).
<https://doi.org/10.54675/ZQGP9595>
- Rawls, J. (1971). *A theory of justice*. Harvard University Press.
<https://doi.org/10.4159/9780674042605>
- Reschovsky, A. (2006). Financing schools in the new South Africa. *Comparative Education Review*, 50(1), 21–45. <https://doi.org/10.1086/499678>
- Ringson, J. (2020). Basic education assistance module as a material and psychosocial support intervention for orphans and vulnerable children in Gutu District, Zimbabwe: An evaluation. *New Ideas in Psychology*, 59, 100803.
<https://doi.org/10.1016/j.newideapsych.2020.100803>
- Roux, T. (2003). Comment on the Department of Education’s report to the Minister on a review of the financing, resourcing and costs of education in public schools (Research Report). Centre for Applied Legal Studies, University of the Witwatersrand.
<https://www.wits.ac.za/cals/publications/research-reports/>
- Sayed, Y., & Motala, S. (2012). Equity and ‘no fee’ schools in South Africa: Challenges and

- prospects. *Social Policy & Administration*, 46(6), 672–687.
- <https://doi.org/10.1111/j.1467-9515.2012.00862.x>
- Sayed, Y., Motala, S., Carel, D., & Ahmed, R. (2020). School governance and funding policy in South Africa: Towards social justice and equity in education policy. *South African Journal of Education*, 40(4), 1–10. <https://doi.org/10.15700/saje.v40n4a1944>
- South Africa. (1996). Constitution of the Republic of South Africa Act 108 of 1996. Government Gazette, 17678. <https://www.gov.za/sites/default/files/images/a108-96.pdf>
- South Africa. (1996). South African Schools Act 84 of 1996. Government Gazette, 17579. https://www.gov.za/sites/default/files/gcis_document/201409/a84-96.pdf
- Standish, P. (2014). What is the philosophy of education? In R. Bailey (Ed.), *The philosophy of education: An introduction* (3rd ed., p. 4–20). Bloomsbury Academic. <https://doi.org/10.5040/9781472593505.ch-001>
- Tikly, L., & Barrett, A. M. (2011). Social justice, capabilities and the quality of education in low income countries. *International Journal of Educational Development*, 31(1), 3–14. <https://doi.org/10.1016/j.ijedudev.2010.06.001>
- Unterhalter, E. (2019). The many meanings of quality education: Politics of targets and indicators in SDG 4. *Global Policy*, 10(S1), 39–51. <https://doi.org/10.1111/1758-5899.12618>
- Van der Berg, S., Taylor, S., Gustafsson, M., Spaul, N., & Armstrong, P. (2011). Improving education quality in South Africa (Report No. 2). Department of Economics, University of Stellenbosch. <https://www0.sun.ac.za/econ/assets/File/ImprovingEducationQualityinSA.pdf>
- Welton, M. R. (Ed.). (1995). *In defense of the lifeworld: Critical perspectives on adult*

learning. SUNY Press.

Welton, M. R. (Ed.). (1995). In defense of the lifeworld: Critical perspectives on adult

learning. State University of New York Press. <https://doi.org/10.1353/book107689>

White, C. J., & Van Dyk, H. (2019). Theory and practice of the quintile ranking of schools in

South Africa: A financial management perspective. South African Journal of

Education, 39(S1), S1–19. <https://doi.org/10.15700/saje.v39ns1a1771>

Wilson, S. (2004). Taming the constitution: Rights and reform in the South African education

system. South African Journal on Human Rights, 20(3), 418–447.

<https://doi.org/10.1080/19962126.2004.11865112>

Young, M. (2011). What are schools for? Educação, Sociedade & Culturas, 32, 123–135.

<https://doi.org/10.1590/S0104-40602011000100008>