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Neoliberalism and inclusive education in post-apartheid South African schools: A critical review of the World Bank's neoliberal education agenda



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M.Ed Research report

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15 February 2022

DECLARATION

I, Nomsa Mnisi, declare that this is my own work which is submitted for the degree of Masters in Education at the University of the Witwatersrand, Johannesburg. It has not been submitted for any other degree or examination at any other university.



Nomsa Mnisi

1365109

Signed on this 14th day of February 2022.

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Foremost, I would like to thank God for giving me the strength to endure through this journey.

To my parents, thank you for your sustained support in fulfilling many of my dreams.

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To my dearest friends that have always held belief in me, thank you.

ABSTRACT

Countries globally have adopted the inclusive education agenda to redress the exclusion of learners in schools. The features of inclusive education, namely, equal access, participation and opportunities for all, ought to remain at the centre in building successful education systems under this agenda. Nevertheless, in asserting its own agenda for education, the World Bank has recast the realisation of inclusive education in schools through its neoliberal stance and public policies. Looking at the countries of the Global East, the revelation is that the World Bank's neoliberal education agenda presents vast unevenness to the global village, inequalities in society and little hope for learners to receive an inclusive education in schools. In post-apartheid South Africa, the World Bank's neoliberal education agenda that characterises its educational projects and inclusive policy reveals a disengagement between inclusive education tenets and neoliberal practices. Therefore, as it stands, the social problems that emanate are unevenness in the global village and societal structural inequalities that leave many people lacking the skills to secure employment or to be globally competitive. The research problem in this study is the exclusion of learners in schools. Learners are not affirmed their right to education as a social good that redresses the inequities of the past by increasing their access to and participation and opportunities in schools. In addressing this ongoing struggle occasioned by the World Bank's neoliberal education agenda, this research report critiques the status quo, highlighting the exclusionary conditions and the need for transformation that would ignite a social change in the distribution of education to be provisioned in post-apartheid South African schools. The contributing argument I make maintains that the World Bank's neoliberal education agenda exacerbates these problems of unevenness, inequalities and exclusion. Therefore, as the World Bank's education agenda is not compatible to the values of inclusive education that rely on fulfilling educational and socio-economic rights, its agenda should be re-evaluated. As an extreme alternative, in ensuring the future carries values that represent equality, their presence ought to be diminished in the context of South Africa.

KEYWORDS: Neoliberalism; World Bank; neoliberal education agenda; inclusive education; exclusion; schools; South Africa

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ACRONYMS AND ABBREVIATIONS

DBE	Department of Basic Education
IBRD	International Bank for Reconstruction and Development
IFC	International Finance Corporation
PISA	Programme for International Student Assessment
SASA	South African Schools Act
SGB	School Governing Bodies
STARS	Strengthening Teaching-Learning and Results for States
TINA	There Is No Alternative
UNESCO	United Nations Educational, Scientific and Cultural Organization

CHAPTER 1: RESEARCH OVERVIEW

1.1 INTRODUCTION AND BACKGROUND

Neoliberalism has asserted itself in providing potentially fruitful economic prospects expressed within educational policies. The World Bank as a proponent of neoliberalism and the largest international aid agency to fund the education sector, has asserted its role in the South African educational context as a donor through its investments projects aimed at implementing educational change underpinned by the principles of quality and inclusiveness (IFC, 2010a; 2014; Klees, 2020; Mundy & Menashy, 2014). However, these are often embedded in problematic neoliberal ideals that propagate global unevenness, societal structural inequalities and exclusion of learners in schools. The philosophy of inclusive education finds expression in providing meaningful access to a quality education, fair opportunities and equal participation to all (Slee, 2018). The problem addressed in this study is that the World Bank's neoliberal education agenda counters these inclusive features with the literature revealing that it mostly serves the elite and does very little to alleviate the plight of the poor (Mundy & Menashy, 2014; Spreen & Kamat, 2018; Vally, 2020). Effectively, the capitalism propelled by this neoliberal agenda exerts pressures within the educational system that pose a threat to the essence of the social good.

Therefore, a solution to the problems imposed by the World Bank's agenda in education would be to re-strategize their agenda. An inclusive education agenda geared towards rights-based values is required – one that prioritises quality education for all and not exclusively having a focus on developing human capital as the main goal. This is the main argument of this study which aims to contribute to the debate on how to mitigate global unevenness, societal structural inequalities and exclusion of learners in schools. In addressing this problem, using Critical Theory as a theoretical framework, I embark on a critical review of the World Bank's education agenda to explore the extent to which it ensures a quality education for all. Further, strategies rooted in the values of the theoretical framework are provided to ameliorate the problems related to the implementation of the World Bank's neoliberal education agenda.

1.2 PROBLEM STATEMENT

Before defining the problem statement, I find it important to shed light on the political transformation in 1994 as post-apartheid South Africa moved towards a more equitable society in terms of the Constitution of the Republic of South Africa (RSA, 1996). Education as the catalyst for transforming the country's social inequalities supported by segregation policies and economic inequalities evidenced in inferior education that limits working opportunities meant that various policies in the sector needed to be reformed. Key to this study, these are the South African Schools Act (SASA) (Department of Education [DoE], 1996) which provides for a uniform system for schools and the Education White Paper 6 (EWP6) (DoE, 2001) as a framework for the development of inclusive education. However, despite these policy reforms, the education system still experiences tensions between policy ideals and practice in the equal distribution of education as a social good. At the meso level is the school that has inadequate resources (Andrews, Walton, & Osman, 2021; Ostendorf, 2019); at the micro level are classrooms that are overcrowded (Magodla, 2019). At a macro level are South Africa's poverty levels (World Bank, 2018a) and the inevitable interaction with the rest of the world that puts pressure on the country to adopt neoliberal polices that have, in effect, exacerbated inequalities (Ndimande, 2016).

In that regard, the research problem that this study explores are the neoliberal agendas of multinational organisations such as the World Bank which have been presented as a way of ameliorating and improving the quality and equality of our education. The World Bank is by no means the only purveyor of the educational crisis in South Africa. However, the study finds that there is tension between the World Bank's inclusive policy ideals and achievement. I posit that its presence and how it chooses to extend its financial muscle through its projects and inclusive policy exacerbate the exclusion of learners in post-apartheid South African schools. As espoused by Becker and du Preez (2016), this is due to the expansion of the private sector in education which the World Bank endorses. Such private sector involvement dichotomises the education system under a neoliberal education agenda.

Consequently, independent schools are well-resourced for better educational outcomes, but learners who rely on public schools with few resources have their rights unfulfilled and are unable to attain an inclusive education in the face of the neoliberal

agenda that dominates the education system. Instead of education being a catalyst for the development of human capital and promotion of economic growth, a hierarchy has developed that diminishes its social benefit because of entrenched exclusion of most learners.

In similar vein, the social problems that this study identifies are expressed in a twofold manner between an uneven global village and reinforced societal structural inequalities. The uneven global village between countries of the Global North that exercise their dominance compromises the relations with the Global East and South. This is because loan conditions imposed by international lenders imply that the economies of the borrowing countries need restructuring. Regrettably, the poor suffer the consequences of higher country debt levels as the funds that should be invested in education are instead used to service sovereign debt. The societal structural inequalities are thus reinforced between those that have the means to explore their choices in the free market which feeds into the capitalistic neoliberal ideologies (Friedman, 1962; Ndimande, 2019) and those that cannot. Thus, the exclusion in schools is experienced most by those from poor socioeconomic backgrounds who have fewer skills required to meet the demands of the job market in the twenty-first century society.

To address these problems caused by the World Bank's neoliberal education agenda, strategies need to be geared towards a new framework which holds it accountable for ensuring that its agenda encompasses values of inclusion and fair distribution of educational opportunities across the entire education system.

1.3 AIM OF THE STUDY

The aim of this study is to provide a critical review of the World Bank's neoliberal education agenda in post-apartheid South African schools.

1.4 CENTRAL ARGUMENT

The World Bank does substantial work in countries globally. However, the consequences of increasing global unevenness, inequalities in society and exclusion of learners in South African schools indicate that the World Bank's agenda in education should be reassessed in safeguarding the inclusive education agenda.

Alternatively, impact of the World Bank's neoliberal agenda should be diminished in order to ensure the education system is underpinned by the tenets of inclusion.

1.4.1 Sub-arguments

The conceptual clarification provides a foundation for understanding the key concepts of neoliberalism, exclusion, inclusive education and schools in order to understand the impact of a neoliberal agenda in South African education. In looking at its educational projects, the trends and debates on the World Bank's neoliberal agenda indicate that these projects lead to the exacerbation of global unevenness, reinforcement of societal structural inequities and exclusion of learners in education. Therefore, Critical Theory as a theoretical framework provides a mechanism for critiquing the World Bank's neoliberal agenda so as to address emancipation, transformation and social change required in post-apartheid South African schools.

Furthermore, the critical review of the World Bank's inclusive policy in post-apartheid South African schools shows that there are problems with equal access, opportunities and participation in education being attained by all learners. The central contribution that this study seeks to make is that inclusive education should not be under threat of neoliberalism in post-apartheid South African schools. If we seek to redress past inequalities, agendas that lead to discrimination should not be obstacles to this realisation in our education system. The study will also contribute to existing literature by arguing that states in the Global East and the Global South need to take up their responsibility to their citizens in mitigating the opportunities that permit neoliberal agendas to undermine the provision of education as a social good.

The overall picture emerging shows that there is still vast exclusion for learners in schools that need to be carefully addressed within the World Bank's education agenda which currently seeks first and foremost to serve the elites. The tenets of Critical Theory provide strategies for ensuring that inclusive, socially just and democratic values form the epicentre of all educational initiatives. In looking towards the future, the World Bank's neoliberal education agenda in South Africa needs to include accountability for solving the problems their agenda has brought with it and reassessing the approach of their agenda.

1.5 METHODOLOGY

This is a conceptual study that relies on a review of literature and locates the research within a theoretical framework. Therefore, this conceptual study engages mainly with literature as opposed to conducting empirical research (Frankena, 1973). In this study, the researcher makes use of Frankena's (1973) three methods of enquiry involving a descriptive enquiry, an analytical enquiry and a normative enquiry.

The descriptive enquiry requires the researcher to provide conceptual clarity, a review of relevant literature and the adoption of a theoretical framework. Chapter 2 contributes to the study by providing a clarification of the concepts and features of neoliberalism, exclusion in education, inclusive education and schools. Further, the researcher discusses a relationship between these concepts and their effects to draw a picture for the study. Chapter 3 presents a review of literature, drawing from the concepts that have provided a foundation for the study in Chapter 2 to make sense of the trends and debates. This chapter also serves the purpose of describing the background to the research problem in the Global East and South. Chapter 4 lays out the preferred theoretical framework which is the Critical Theory: its features, virtues and critiques. It serves as a basis for critically reviewing the World Bank's education agenda by looking at its inclusive education policy which follows in Chapter 5.

The analytical enquiry introduces Chapter 5 that requires the researcher to critically review the World Bank's education agenda in fostering inclusive education in post-apartheid South African schools using an evaluative and theoretical analysis. Its inclusive education policy includes the *Education sector strategy* (World Bank, 1999) and *Learning for All: investing in people's knowledge and skills to promote development – the World Bank Group education sector strategy 2020* (World Bank, 2011). In critically reviewing the inclusive education policy informing the World Bank's education agenda, the researcher declares that the World Bank seeks to inhibit access, opportunity and participation in education. Therefore, the evaluative analysis underpinned by the Critical Theory shows how the World Bank's neoliberal education agenda excludes those from poor socioeconomic backgrounds from a quality inclusive education. A theoretical analysis follows on areas that these policies should continue to promote (areas of agreement) and those that need to be urgently halted (areas of disagreements).

The normative inquiry provided in Chapter 6 involves the researcher in finding strategies that can be used to move us from where we are to where we ought to be as far as inclusive education is concerned in post-apartheid South African schools under the World Bank's neoliberal education agenda. In this chapter, the researcher reviews the problem statement and provides context for the tension between the World Bank's inclusive education policy and practice in South African schools. The context provides a platform for the researcher to propose possible strategies for how the World Bank could rectify its agenda that has proven to be exclusionary. The researcher concludes the normative enquiry by looking into the future of the World Bank's agenda in post-apartheid South Africa.

1.6 OUTLINE OF CHAPTERS:

Chapter 1: Research Overview - The research overview provides a brief introduction and background to the study, foregrounding the problem statement, aim of the study, central arguments along with the sub-arguments and research methodology.

Chapter 2: Concepts underpinning the study and their features are elaborated on, including how we can pursue inclusive education in the midst of the World Bank's neoliberal agenda. The chapter provides a starting point that reveals that the concept of neoliberalism and its features are incompatible with inclusive education.

Chapter 3: Neoliberalism and inclusive education in schools: trends and debates. In this chapter, the World Bank's educational projects that ought to promote inclusion in the Global East and South are reviewed. The chapter starts by looking at the Washington Consensus that laid the foundation for neoliberalism. It argues that the dimensions of neoliberal governance and public policy have extended global unevenness in countries where these educational projects are launched. The societal structural inequalities highlight the distinctions between the poor and the elites which invariably lead to the stratification and exclusion of learners in schools. The factors that contribute to the lack of quality education are identified. Thus, it contributes to the study by revealing that inclusive education in post-apartheid South Africa, as in other parts of the world, is not fostered by the World Bank's education agenda.

Chapter 4: A Critical Theory perspective. This chapter explores the principles of Critical Theory as the theoretical framework underpinning this study. These principles include critique, emancipation, transformation and social change. The contribution of

this chapter is that Critical Theory provides a compass to use in identifying the forms of power supported by a neoliberal agenda. A review of neoliberal public policies with regard to deregulation, liberalisation and privatisation follows and solutions are suggested for implementing an inclusive education in schools under socially just and democratic values.

Chapter 5: Critical analysis of the World Bank's inclusive policy in post-apartheid South African schools. This chapter provides an evaluative analysis that looks into the World Bank's inclusive policy and a theoretical analysis of its inclusive education agenda by looking at both its inclusive policy and projects. It argues that the World Bank's inclusive education agenda is not aligned with the inclusive education philosophy tenets from a Critical Theory viewpoint. This chapter contributes to the report by offering insight that the World Bank's neoliberal agenda evidenced in its inclusive policy and projects regrettably exacerbate global unevenness, societal structural inequalities and exclusion of learners in schools. A clear picture emerges that the agenda defies the criteria of Critical Theory with the end goals of democracy and social justice being unfulfilled.

Chapter 6: The World Bank's neoliberal education agenda and inclusive education in post-apartheid South African schools: where to from here? In this chapter, the World Bank's pervading tension between its idealisation and achievement in South African schools is detailed as informed by chapter 5. It also provides possible strategies underpinned by Critical Theory that take us from where we are to where we ought to be in the implementation of an inclusive education. This chapter also provides a standpoint on the future of the World Bank's neoliberal education agenda in post-apartheid South African schools. This chapter contributes to the report in solving the research and social problems raised in the problem statement and central argument of the study by directing us towards a future free of global unevenness, societal structural inequalities and exclusion of learners in South African schools.

Chapter 7: Conclusion. This final chapter provides a summary of the conceptual report. In post-apartheid South African schools, the World Bank's neoliberal education agenda that characterises its educational projects and inclusive policy reveals a disengagement between inclusive education tenets and neoliberal practices. The problems that have been motivated this research has been the World Bank's neoliberal education agenda causing an increase in the global unevenness, societal

structural inequalities and exclusion of learners in schools. The central argument has thus been that their influence in South Africans be rejected as they do not foster the values of an inclusive education. In solving this argument and looking towards the future, I propose that they revise their neoliberal education agenda so as to include values of social justice and democracy in fostering inclusive education.

CHAPTER 2: NEOLIBERALISM, INCLUSIVE EDUCATION AND EXCLUSION IN SCHOOLS: CONCEPTUAL CLARITY

2.1 INTRODUCTION

> Neoliberalism has utterly failed as a viable model of economic development, yet the politics of culture associated with neoliberalism is still in force, becoming the new common sense shaping the role of government and education. This 'common sense' has become an ideology playing a major role in constructing hegemony as moral and intellectual leadership in contemporary societies. (Torres, 2011, p. 97).

In providing a sense of the neoliberal agenda, Torres (2011) creates context in the permeance of neoliberalism in all spheres of society that has come to be understood as a progressive common sense. Consequently, in that process it has thwarted the globally accepted general conceptual understanding of the values an inclusive education that equally caters to all needs to carry. Therefore, the aim of this chapter is to provide the key concepts that inform the World Bank's neoliberal education agenda.

This chapter is divided into two sections. Section 1 provides a conceptual clarification of neoliberalism, inclusive education, exclusion in education and schools. The key message it communicates is that neoliberalism hinders inclusive education. Section 2 focuses on what one can expect from schools operating in a neoliberal climate. The key message it communicates is that given all the concepts, neoliberalism from both the inclusion and exclusion side at the global level, societal level and school level, encompasses both negatives and positives. The contribution made by this chapter to the rest of the report is a starting point that reveals how the concept of neoliberalism and its features are incompatible with inclusive education and its features. Thus, the neoliberal education agenda presents exclusion in schools.

2.2 NEOLIBERALISM

Neoliberalism is an ideology of political and economic practices that favour free markets (Steger & Roy, 2010). Harvey (2007) further postulates that through neoliberalism "human well-being can best be advanced by liberating individual entrepreneurial freedoms within an institutional framework" (p. 2). Its central features

as conceptualised by Steger and Roy (2010) are three-dimensional: a) an ideology; b) a mode of governance; and c) a policy package.

Neoliberal ideology is supported by multinational organisations such as the World Bank, global power elites, state bureaucrats and corporate lobbyists (Steger & Roy, 2010) whose dominance allows making their own rules and engendering remarkable change in landscapes in which they choose to exert their presence. The neoliberal ideology essentially further advances and helps accumulate their personal wealth (Harvey, 2007). Politicians and state bureaucrats specifically in post-apartheid South Africa exhibit neoliberalism through austerity measures (Christie, 2010) and reform policies embedded in this ideology (Bond, 2005).

Neoliberal governmentality (as a dimensional feature) establishes itself through entrepreneurial values under self-interested gains that call for greater participation in order to drive competitiveness, innovation, efficiency, decentralisation and greater choice in the market (Conteh, 2014; Ndimande, 2019; Steger & Roy, 2010). These prescriptions that authorise this mode of governance also require people to be responsible for their own success under a free-market capitalist society. The collective welfare of all in society is reduced to individualism – with the state entity being viewed as an obstruction to development of the prescribed benefits of a neoliberal governance (Friedman, 1962). The rationale of individualism is affirmed on the basis that it holds greater prospects of filling in the gaps in the existing societal structural failures; i.e., maintaining and providing social goods such as education. Therefore, from this perspective, the low-income classes are cast incapable of changing the landscape and acting as consumers who are part of this market. This situation breeds elitism and social hierarchies in society.

Neoliberal public policy as a dimensional feature requires deregulation of state control over the education system, liberalisation that favours marketisation policies in schools and privatisation that is created through demand when individuals buy and sell education (Steger & Roy, 2010). The deregulation of state control is seen to provide opportunities on the international market without having to deal with the red tape restricting individuals from pursuing entrepreneurial ventures. Liberalists such as Milton Friedman and John Locke supported this notion as part of a laissez-faire society (Ndimande, 2019) while Adam Smith advocated that the “invisible hand” brings greater opportunity than sole reliance on the government (Ngulube, 2018). Liberalisation

manifests itself with the help of reform polices implemented to redress inequalities and marginalisation. Serving as an exemplar in the South African context would be the South African Schools Act (SASA) (DoE, 1996) which allows for school choice. Apple (2006) argues that educational reforms encouraging school choice are led by marketisation ideals that position choice and competition at the centre. In effect, I would argue that choice and competition are the genesis of stratifying the classes in society in the quest to meet the demands of the capitalist model. Privatisation that is created through demand when individuals buy and sell education creates a smaller elite market that guarantees better quality and efficiency. In turn, as Mathebula (2018) argues, this increases the competitive edge of consumers belonging to this market who have the means to pay to secure this gain which also perpetuates the hegemony in society.

2.3 INCLUSIVE EDUCATION

Inclusive education is an educational concept that advances access to meaningful learning opportunities that foster achievement in learning and participation of all learners' education (Slee, 2018). This is espoused by the Salamanca Statement (UNESCO, 1994) affirming "every child has a fundamental right to education, and must be given the opportunity to achieve and maintain an acceptable level of learning" (p. 3). The philosophy of an inclusive education holds itself out as a great influence in the education space on the premise that no one should be left behind and that everyone should reap the benefits that a progressive education can offer (Walton, 2017). Additionally, inclusive education is an imperative for educational systems in that it fosters a uniform structure with a common goal that can mirror a society that builds social cohesion. Therefore, as a social and political project within education, it needs to be deliberately executed in accordance with the global conventions legitimising the philosophy in rooting out any exclusionary impediments that threaten a quality education for all.

2.3.1 The Neoliberal Ideology

The neoliberal ideology is arguably a force that works for the inclusion of all learners. As conceptualised under a neoliberal agenda it encompasses those from minority backgrounds, poor socioeconomic circumstances and racial groups that have been previously discriminated against. Its conceptualisation of all learners is not limited only

to a privileged few that have no barriers into fully accessing into the philosophy of an inclusive education (Kearney, 2011; Waitoller, 2020). Its features lead to the maximisation of learners' access to a quality education and offer meaningful learning opportunities that foster achievement and wider participation. The market forces are the means of attaining this inclusion. Therefore, an example of a neoliberal ideology propelling inclusion is when resources are distributed and investments are made by these global power elites and multinational corporations to developing countries propelling the chances of access, opportunities and participation to all learners with no limitations that privilege some more than others. This is executed through initiatives such as innovative educational programmes that improve educational standards by introducing new skills and knowledge that are not offered through the conventional public education system that consists a majority of learners prone to be excluded under a neoliberal agenda.

2.3.2 The Neoliberal Governance Dimension

The neoliberal governance dimension is arguably a force that works for inclusion in maximising access, opportunities and participation for all learners. Its features underpinned by entrepreneurial values of competitiveness, self-interest and decentralisation (Steger & Roy, 2010), give proponents of neoliberalism the freedom to explore the markets in the quest for efficiency and innovation. This holds great potential for attracting specific consumers who are assured of social mobility while alleviating the burden of the public sector. The World Bank (1999) has justified that "the job of strengthening education is too big for any single institution" (p. 18). In other words, the free market balances the demand and supply in education. In effect, schools become more efficient and the competence and outcomes of learners are enhanced in providing them with long-term access to education which provides them with greater opportunities to participate in the economy once they leave the system. These three aspects of inclusion under this dimension are beneficial for entrepreneurs, consumers and the state. An example of inclusive neoliberal governance is the South African Schools Act (DoE, 1996) which allows for different constituencies to be involved in schools; e.g., School Governing Bodies (SGBs) play a role in deciding the fees to be charged for attending the school or employing additional teachers not paid by the state. In effect, the freedom and autonomy of entrepreneurs together with legislation foster greater competitiveness between schools.

2.3.3 The Neoliberal Public Policy Dimension

The neoliberal public policy dimension is arguably a force that works for inclusion the inclusion of all learners. As conceptualised under a neoliberal agenda it encompasses those from minority backgrounds, poor socioeconomic circumstances and racial groups that have been previously discriminated against. Its conceptualisation of all learners is not limited only to a privileged few that have no barriers into fully accessing into the philosophy of inclusive education (Kearney, 2011; Waitoller, 2020). Its features lead to the maximisation of learners' access to a quality education and offer meaningful learning opportunities that foster achievement and wider participation. This is done when its features of deregulation, liberalisation and privatisation manifest (Steger & Roy, 2010) to drive inclusive education. Deregulation leads to inclusion in allowing more market players in the education system that provide a myriad of choices that adequately cater to all learners as consumers. Liberalisation leads to inclusion where innovation allows for private actors to improve the quality of the entire education that is accessed by all learners. Privatisation leads to inclusion in alleviating state spending, addresses systemic gaps left by the state and allows more schools to be established within the education system to avoid the overcrowding of schools in one type of schooling. An example of deregulation being inclusive is seen when policies such as the SASA (DoE, 1996) legitimise the various private schools to exist in the market. An example of liberalisation that is inclusive are education providers providing their services to public schools that consists a diverse group of learners in enhancing their educators' skills and learner's competitiveness. An example of privatisation being inclusive is easing the state burden and reducing the pool of learners that would depend on the public sector.

2.4 EXCLUSION IN EDUCATION

Exclusion in education refers to forces such as the neoliberal ideology, governance and public policy that work against the inclusion of all learners (Kearney, 2011). This means that its features do not maximise access to meaningful learning opportunities that foster achievement in learning and participation of all learners (Slee, 2018). More specifically, neoliberalism undermines inclusion and sustains exclusion (Slee, 2019). Waitoller (2020) notes that inclusive education was birthed as a movement whose prime aim was to counteract the exclusion of students from minority backgrounds from

quality educational opportunities. These students were excluded on the basis of socioeconomic circumstances or race from accessing the full privileges of education as a social good in society. De Haan (2000) echoes the view of Jean-Jacques Rosseau that exclusion is a mechanism that produces outsiders and division within people. Therefore, the essence of exclusion is not synonymous with mere exclusion of access to education but extends also to exclusion from access to opportunities within the education system.

2.4.1 The Neoliberal Ideology Dimension

The neoliberal ideology dimension is arguably a force that works against the maximisation of inclusion of all learners – thus only limiting the features of inclusion for a privileged few. Its features lead to exclusion when its ideology proponents (namely, organisations like the World Bank) pose limitations on all learners being able to access an equal, quality education with fair participation and opportunities. Apple (2013) asserts that the education system has a key role in redressing inequalities. In the South African context, this is a far-fetched dream when the state also champions the ideology. The state-citizen contract is contravened when the quality of the provision the social good is left open to market forces which the state permits. An example of a neoliberal ideology that excludes is when education as a social good is based on a business model that only allows the financially privileged to afford access to quality education and limiting meaningful participation and lesser opportunities by the less privileged. In essence, this example of exclusion shows that neoliberalism bears no social benefits that build society as a collective.

2.4.2 The Neoliberal Governance Dimension

The neoliberal governance dimension is arguably a force that works against the maximisation of inclusion of all learners. Its features are underpinned by entrepreneurial values of competitiveness, self-interest and decentralisation (Steger & Roy, 2010) in the quest for efficiency and innovation. The fact that they provide better quality education than the state dissolves the “for all” aspect of inclusion, making it selective. Accordingly, inequities are the first drawback as values of fairness are not prioritised; instead, quests for how power and wealth can be accumulated take priority. An example of a neoliberal governance that excludes is when an education meant to bring success for all, as Waitoller (2020) postulates, limits those from underprivileged

backgrounds from buying into this competitive market. They cannot contribute to the wealth of the entrepreneurial ventures that offer superior quality in their education, and are thus side-lined from its full benefits.

2.4.3 The Neoliberal Public Policy Dimension

The neoliberal public policy dimension is arguably a force that works against the maximisation of inclusion of all learners – when its features of deregulation, liberalisation and privatisation (Steger & Roy, 2010) manifest negatively in education. Deregulation leads to exclusion in that legislation is less restrictive for private actors to assume their role in education with the state having little interference in their ventures. Liberalisation leads to exclusion in that individual education provides opportunities for marketisation ideals in society. Privatisation leads to exclusion in how individuals and institutions create a market for education to be bought and sold. An example of deregulation that excludes is seen when policies; e.g., the SASA (DoE, 1996) makes provision for private schools to exist in the market and not be confined to the regulatory framework followed in the public education system. An example of liberalisation that excludes is when reform policies implemented to redress inequalities and exclusion, instead open up marketized models in education i.e., SGBs deciding on school fees at public schools which can be exorbitant, which counteracts the ideals of a public education system. An example of privatisation that excludes is private schools that can offer a competitive edge to their customer base of parents and learners through their differentiated curricula. Therefore, those in reliance to public education become further excluded as they cannot fairly compete with the advanced education.

2.5 SCHOOLS

A school is an institution that provides an educational service. Two types of schooling are categorised according to the SASA (DoE, 1996); these are public – either being non-fee charging and fully subsidised by the state with very little autonomy in decision-making as they are fully dependent on the state (Maistry & Africa, 2020); fee-charging that are partially subsidised by the state; and private schools that are independently owned. The purpose of schools is to aid in social cohesion, civic participation, improving societies and preparing people for the world of work (Christie, 2008). These purposes of a school align with the values of an inclusive education in that social

cohesion promotes access, civic participation that ensures everyone is recognised and people are prepared for the working world through the opportunities that an inclusive quality education would afford them. Schools are regarded as the purveyor of education. Therefore, it is imperative that in addition to the features of access, opportunity and participation, education is underpinned by the values of equality and justice (Rawls, 1972, as cited in Slee, 2019, p. 910). Essentially, education is a basic human right to be afforded to all.

2.5.1 The Neoliberal Ideology Dimension

In the context of schools, the neoliberal ideology dimension can be a force that works for inclusion when its proponents broaden learners' access to a quality education with greater participation and opportunities of all learners – not limited only to the privileged. An example of this is entrepreneurs investing funds in public and private school teacher skill development that ensures the right pedagogies are imparted during teaching. Learners would then benefit from the access, opportunities and participation from a school focused on bringing them the right skills. This includes ensuring a skilful workforce that is essential for the economic growth of a country (Klees, 2020). The neoliberal ideology can also be a force that works against inclusion in schools when it creates a divide on how less privileged learners are limited from maximised access, opportunities and participation in schools. An example of this is when proponents of this ideology invest more in private education than alleviating the conditions of existing public schools that would unleash equal access, opportunities and participation for all.

2.5.2 The Neoliberal Governance Dimension

In the context of school, the neoliberal governance dimension can be a force that works for the inclusion of all learners when innovative models to improve school governance and functioning are considered. An example of a neoliberal governance working for inclusion is the decentralisation of governance in schools e.g., SGBs in public schools and boards in private schools having autonomy in their decision-making processes that contribute to making schools more efficient. A neoliberal governance principle that works against the inclusion of all learners is when schools compete against each other when the distribution of resources is not even across the education system; e.g., quintile rankings of public schools. The maximisation of access, opportunities and participation of learners from lower-ranking quintile schools is

restricted. An example of a neoliberal governance working against inclusion in public schools would be learners from schools in remote areas not producing the same outcomes as those in urban areas. Thus, differences arise in access to future opportunities and participation in the world of work as tradeable skills differ. An example of a neoliberal governance working against inclusion in private schools is competitiveness between learners' academic capabilities with greater attention being paid to the learning experience of learners that perform better academically.

2.5.2 The Neoliberal Public Policy Dimension

In the context of school, the neoliberal public policy dimension can be a force that works for maximised inclusion for all learners when deregulation allows for schools to have power over their decision-making processes, liberalisation that bring innovative methods to improve quality in schools and privatisation that supports and expands schools within the education system. An example of neoliberal public policy working for inclusion in public schools is the schooling environment being built on efficiency and accountability. For private schools, this would include the innovations that they use to extend their curriculum offerings beyond the requirements of the government-mandated Curriculum and Assessment Policy (CAPS) through differentiation of their schooling models, for example, offering Mandarin as a language, for instance. This ensures great competitive advantage. The neoliberal public policy dimension can be a force that leads to the exclusion of learners when the social good is commodified and moulded to resemble business-like models. An example of neoliberal public policy working for exclusion in public schools is the adoption of privatised ideals within their system i.e., the SGBs making the school fees too expensive. An example of neoliberal public policy contributing to exclusion in private schools is the management's sole interest in profits (school fees) without truly enriching the learning experience of its consumers (learners).

2.6 WHAT CAN ONE EXPECT FROM SCHOOLS OPERATING IN A NEOLIBERAL CLIMATE?

Neoliberalism is a concept that relies on economic and political approaches whose dimensions are intertwined, namely, an ideology, a mode of governance and a public policy package.

2.6.1 Neoliberalism at the Global Level

On the inclusion side, neoliberalism at the global level promotes access, opportunities and participation for all learners and holds prospects for levelling the uneven playing field. Education is regarded as the solution to solving poverty and bringing economic growth to developing countries. Therefore, as inclusive education is informed by global conventions, neoliberalism promises to attain these lifelong sustainable goals where education is equitably and equally accessible to all. Thus, as a social project coming together with neoliberalism's economic and political approaches, all learners will be afforded competitive skills in responding to twenty-first century work demands while opening up a plethora of choices of work (OECD, 2017).

On the exclusion side, at the global level, neoliberalism is a force that works against inclusion through stratifying the privileged and those from poor socio-economic backgrounds, thus further making the playing field uneven. It acts as a form of power to govern and transcribe policy that serves and reinforces the interests of its proponents and those willing to buy into its market-oriented models. Furthermore, the Global North exerts power over the Global South and East through educational initiatives that do not suit the specific context of different developing countries nor the levels of development and slower progress being made by such developing countries in terms of reforming their education systems. This view is supported by Spring (2009) in saying the World Bank promotes "particular economic and political agendas that benefit wealthy and rich nations at the expense of the world's poor" (p. 13).

2.6.2 Neoliberalism at the Societal Level

At the societal level, Adriany (2018) postulated that "education is seen as a form of investment that will bring a higher return to the society" (p. 4). Therefore, neoliberalism responds to structural inequalities by using education that spans all levels of society especially in areas where the public sector is found wanting. In essence, the dream for all to be educated is not deferred. Additionally, a strengthened education system would translate into having a uniform structure with a common goal that fosters social cohesion.

At the societal level, the state is largely to blame for legitimising market-oriented solutions to assist in meeting the needs of its citizens along with handing their authority over to the private sector and its elites. In essence, this exacerbates existing structural

inequalities in society between the privileged who have a choice to easily access these expensive products such as privatised education and those that do not and have to depend on the public education system. Klees (2020) expresses that “Education within capitalism too often reproduces social and economic inequalities” (p. 9). Consequently, the ethos of society under neoliberalism now comes to be defined as privilege begetting privilege while others do not have the means to overcome their current circumstances and are forced to move further away from the hegemonic centre. Essentially, the societal structure is designed never to fail the power elites nor have them being disadvantaged by state failure.

2.6.3 Neoliberalism at the School Level

At the school level, as Maistry and Africa (2020) declare: “A neoliberal capitalist market system has little tolerance for ‘inferiority’” (p. 6). This means that the inclusive forces that work to the inclusion of all learners under a neoliberal conceptualisation is met by widening access to quality schooling, which should lead to greater competence and hone learners’ tradeable skills.

However, at the school level, the inclusion of all learners is undermined by neoliberalism as a high-quality education, better competence and outcomes are strictly tailored for those belonging to the elite market. Given reduced expenditure and greater competition as cruxes of neoliberalism, the presence of private schooling and fee-paying public schools has dire implications for exclusion when poorer schools cannot compete on account of being financially restricted (Maistry & Africa, 2020). This includes having the right class of consumers (e.g., affluent parents) to raise funds that would offer a competitive edge to their learners. Those who are constrained from providing better resources and have limited learning resources like social and economic capital are exposed to forces that they cannot control nor fairly compete against. Thus divisions from and within schooling that an inclusive education aims to eradicate for the access in the accommodation of learners from minority backgrounds and poor socio-economic backgrounds within education are further reinforced.

The central argument of this research report maintains that the World Bank’s neoliberal agenda in education ought to be reassessed or its influence should be restricted in order to propel and maximise the tenets of inclusion in schools. Given the inclusionary and exclusionary forces that neoliberalism has shown to bring across the

globe, society and schools, the emerging picture reflects that inclusive education remains a constant struggle in terms of maximising access, participation and fair opportunities for all. When it comes to inclusive education in schools, we can expect advocates of the neoliberal ideology, governance and public policy to reason that education fosters economic growth and building human capital. However, in terms of my central argument, neoliberal ideology, governance and public policy can be critiqued when it comes to the enaction of inclusive education in schools as these advocates, i.e., the global power elites and state actors positioned to protect its citizens, fuel the exclusion of many from an equitable quality education. Ultimately, countries of the Global South and East are seemingly faced with a predicament between lagging behind the rest of the world or, as Torres (2011) describes “a new common sense” by adopting what keeps these countries of the Global North satisfied.

2.7 CONCLUSION

In this chapter, I defined neoliberalism and its dimensions of ideology, governance and public policy, exclusion in education, inclusive education and schools as key concepts informing this study. Further, I showed the relationship between the key concepts, how their dimensions lead to both inclusion and exclusion and provided relevant examples. The clarification led to looking at the impact of the dimensions of neoliberal ideology on the school climate at the global level, the societal level and school level. This chapter showed how inclusive education under neoliberalism is a tug-of-war between maintaining its value as a public good and an economic good as defined by neoliberalism. On one end of the spectrum, it comes dressed as a worthy cause to improve the delivery of public goods. However, it simultaneously creates an uneven playing field, societal structural inequalities and exclusion of learners in schools in developing countries such as South Africa that threaten basic human rights to education. The next chapter looks at the trends and debates about neoliberalism in education in countries of the Global East and South.

CHAPTER 3: NEOLIBERALISM AND INCLUSIVE EDUCATION IN SCHOOLS: TRENDS AND DEBATES

3.1 INTRODUCTION

> Technical assistance should be directed to strategic fields of intervention with a multiplier effect, especially in developing countries. One important task for international co-operation is to support the launching of pilot projects aimed at trying out new approaches and at capacity building (The Salamanca Statement and Framework for Action on Special Needs Education, UNESCO, 1994, p. 20).

As part of building the inclusive education philosophy, The Statement (UNESCO, 1994) concurs on donor agencies such as the World Bank[1] providing assistance through investing in people, institutions and projects that will see this realisation. Capacity building remains important in solving exclusion in education amidst issues of insufficient funds and improving quality to match global standards amongst other issues plaguing education. Overall, as the literature is presented, the aim of this chapter is to review the literature on the World Bank's neoliberal education agenda by looking at its educational projects and how they affect the global village, societal inequalities and exclusion of learners in schools.

Section 1 provides an account of the Washington Consensus. It discusses the origin and history of the development of neoliberalism globally as well as the overall effects that exacerbate the social problem of global unevenness. Section 2 provides a review of the educational project in India in the Global East looking at the World Bank's neoliberal public policy. The message is that the project embraces the opportunity feature of inclusion but fails to do the same for the features of access and participation of learners in schools. This exacerbates social structural inequalities and exclusion of learners in schools. Section 3 provides another review of the educational project in China in the Global East looking at the World Bank's neoliberal governance. The key message is that the investment educational project does not uphold any of the features inclusive education. Furthermore, it contributes to social inequalities and exclusion of learners in schools. Section 4 provides a review of the educational investment project

[1] Relevant to this study are its two member groups namely the International Finance Corporation (IFC) arm that lends to private sector companies in developing countries (IFC, 2014) and the International Bank for Reconstruction and Development (IBRD) that lends to middle-income and low-income countries.

in post-apartheid South Africa in the Global South by looking at the World Bank's neoliberal governance. The key message is that only the access feature of inclusion in education is affirmed. Furthermore, it contributes to social inequalities and incomplete realisation of inclusion of learners in schools. The contribution made by this chapter is that the World Bank's neoliberal education agenda contributes to global unevenness, social inequalities and exclusion of learners in schools.

3.2 THE WASHINGTON CONSENSUS

Neoliberalism can be said to have emerged under its broad concept, globalisation, that took root in the 1980s with former USA president, Ronald Reagan, and former British Prime minister, Margaret Thatcher, at the forefront in revolutionising economic policies and foreign affairs. Britain and the United States of America were in pursuit of liberalised capital flows, privatisation and free markets which would ultimately grow a global economy (Harvey, 2007). This was triggered by the end of the Cold War. The world began to seek better policies to help rebuild the global economy. The Washington Consensus outlined ten economic policy standards[2] that would be applied in Latin American countries in the 1990s. However, these soon spread to assist (Williamson, 2004) and be applied through the Structural Adjustment Programmes in the countries of the Global South in the quest for "poverty alleviation" (Steger & Roy, 2010). The intention was to make these economies competitive through the assistance of financial institutions such as the World Bank (Williamson, 2004) whose conditions for the funding were the implementation of terms set out by the lender (Conteh, 2014). Therefore, the Washington Consensus was used by these institutions to devise market-oriented policies. Ultimately, the Washington Consensus was aimed at driving economic growth in developing countries. However, Nobel economist, Joseph Stiglitz, (2004) described it as the "neoliberal manifesto" that served the interests of developed countries and its ideology proponents, such as the World Bank whose supported programs were blueprints of the Washington Consensus, more than it served the recipients of the aid (Goldfajn, Martínez, & Valdés, 2021). Essentially, these countries were placed under economic siege by the free market.

[2] 1) fiscal discipline and curbing budget spending; 2) a reduction of government spending; 3) tax reformation; 4) financial liberalisation, with interest rates determined by the market; 5) competitive exchange rates; 6) trade liberalisation; 7) promotion of foreign direct investment; 8) state entity privatisation; 9) deregulation of the economy; and 10) protection of property rights (Steger & Roy, 2010, pp. 19-20)

As a result, the Washington Consensus promoted global unevenness between countries of the Global North and Global East and South as the North spread its dominance over these regions (Stiglitz, 2004). This regrettably meant that wealthy states, by increasing loans to Global South states which created a situation of dependency, reverted to historical positions of maintaining their power in these territories ostensibly by creating trading opportunities for them to be self-sufficient states. Therefore, the national sovereignty of these states with their mandate to serve the best interests of their citizens was also diminished. They needed to adhere to dictatorial terms from multinational corporations such as the World Bank that provided them with loans. Economic reforms on a global scale cannot conform to a single model and expect the same outcomes for growth wherever they are applied. Contextual considerations are needed, otherwise the arguable benefits that interconnectedness between countries brings, becomes exploitative with little benefit to the Global East and South countries. In essence, as Penn (2002) states, countries of the Global East and South become victims of meeting the demands of policies and projects from the Global North instead of benefiting their own citizens.

Consequently, as a trickle-down effect of the Washington Consensus, structural inequalities in societies are created as spending on quality social goods such as public education declines because the beneficiary countries need instead to service their debt. As a result, the quality provisioning of these social goods means one has to be financially privileged to source the good either at a higher price or in the private market. In this way, the neoliberal governance of wealth accumulation means that access, opportunities and participation are disproportionately spread. By implication, this incurs high social costs for social goods such as education resulting in exclusion of the majority of learners at public schools which are supposed to develop human capital to contribute to an educated and skilful society that can foster economic growth. As espoused by former South African Minister of Finance, Trevor Manuel (2003) on countries of the Global South, what is essential is the "…need to expand, not contract, their public sector – and dramatically improve its efficiency in delivering quality public services" (p. 19). Ideally, strengthening the capacity of the public sector so as to avoid exclusionary neoliberal agendas would have a greater benefit for the majority who could become productive citizens through the skills and knowledge derived from their education.

3.3 INDIA

In 2020, the World Bank through its International Bank for Reconstruction and Development (IBRD) arm lent India $500 million in launching the Strengthening Teaching-Learning and Results for States (STARS) project (World Bank, 2020a) that targeted the improvement of the quality and outcomes of education and school governance in six Indian states. The end goal of the project is set to see learners (i.e., school-going children) being better prepared for the labour market (World Bank, 2020). The World Bank envisions this project as a facilitator to fuel the “Education for All” philosophy mandating that all children receive basic education. This project is intended to contribute to economic and social progress which is one of the World Bank’s most imperative motivations in investing in developing countries such as India. The World Bank’s country Director in India (World Bank, 2020) supported this notion by asserting that “Investing more in the early years of education will equip children with the skills required to compete for the jobs of the future” (p. 1).

By implication, neoliberal public policies comprising of deregulation, liberalisation and privatisation are commendable to have in India. This threefold pathway underpins the growth in opportunities and improved efficiency of the economy, and encourages people to move away from being solely dependent on the state by commoditising education. Gaps that have been unattended to by the state are closed through such innovative projects from the World Bank. However, Dutta (2020) criticises the World Bank for framing this project from a business model perspective. This leads into the broader argument of global unevenness being created between India as a developing country having to resort to market-oriented projects alongside private actors like the IBRD for the quality provisioning of social goods such as education.

By implication, the neoliberal public policy exemplified through such projects in India reinforces societal structural inequalities that hinder social justice and inclusion initiatives (Dutta, 2020; Mangla 2018). The public sector that is meant to accommodate all citizens has not only traded its state control for the neoliberal requirements in the funding arrangements of the World Bank, but has replaced aspects of equity for efficiency. The attempts to fast-track the development of the economy by means of projects only that benefit only a small portion of the population while simultaneously adding the burden of debt are not indicators of progress. The access, opportunities

and participation for all under such market-driven initiatives becomes an elusive dream as the emphasis is placed on first meeting the needs of profit-making businesses rather than on societal capacity building. Further, the project translates to public education being offered at a higher cost than what was intended by consumers, with private actors adding extra fees for the enhancement of the educational services that they provide. A different perspective on how such projects can foster inclusive education could be that certain measures may be too risky for the state to undertake in improving educational quality; therefore, deregulation and liberalisation allowing for business risks to be taken for certain investments and projects makes better sense. In effect, the World Bank agenda with the emphasis on neoliberal public policies contributes to the cycle of structural inequalities in society. It comes down to the fact that finance is needed to access better privileges.

Ultimately, this leads to the exclusion of learners in schools and schooling stratification that differentiates between those that have the competencies required by the labour market and those who could not afford to attend schools that could provide them with such competencies. Gupta (2018) asserts, however, that the support of the World Bank aimed at helping schools in poor communities is rooted in neoliberal narratives. Evidence of this is seen in the project seeking that the six schools have reforms centred around governance. By implication, deregulation, allowing the World Bank to have such a prominent voice in the country's education sector, diminishes the authority of the state more than assisting in easing the financial burden on the state. Ultimately the state is deemed as failing in its role in addressing the gaps within the education system (that the World Bank recognised beforehand) that need to be bridged to strengthen all public schools in India. One of the inclusive aspects of neoliberalism outlined in Chapter 2 was that deregulation, liberalisation and privatisation improves quality. In the instance of India, I consider this as privatisation being enacted within public education which creates greater unevenness in the playing field. This statement can be justified because the private actors within the public education system support the neoliberal narratives that maintain that charging higher fees in schools found in poor communities leads to greater efficiencies – this clearly does not make sense because this would counteract the objective of widening access to education. In simpler terms, the public policies which are reflective of a democratic India result in

exclusion that is undemocratic for the majority who cannot keep up with these neoliberal narratives (Boucher, 2020).

By implication, inclusive education is unrealised for a larger group of learners from poor socioeconomic backgrounds who do not benefit from the STAR project although this particular project is meant to support inclusivity in education. Moreover, this has led to stratification between schools in the public sector as only six schools were funded. As mentioned previously, neoliberalism will always attempt to assert its position in the quest for economic gain. The rates of return on investments are primarily more beneficial to the World Bank in further spreading its neoliberal agenda – as evidenced in the accrual of interest on the loan of the project – than the state of India. The envisioned development of human capital considered to drive economic growth has not materialised to the extent that it should have.

3.4 CHINA

In 2014, the World Bank through its International Finance Corporation (IFC) arm as part of its investments in K–12 education projects invested $9.5 million in China's largest independent international school operator, Maple Leaf Educational Systems Limited (IFC, 2014) in order to help them to expand, acquire new schools and improve their already existing schools across the country. The investment sought to meet the demand for private education by middle-income families in mainland China and to improve access to schools that offered quality yet affordable bilingual education. The project also sought to bring financial returns on investment as the company's credibility and visibility in the market increased. The model of this chain of schools promises its consumers, i.e., learners, better prospects of applying to both Chinese-speaking and English-speaking international universities after completing their schooling (IFC, 2014). IFC's Acting Asia Pacific Regional Head stated that "Increasing access to affordable and quality education will ensure a supply of future talent to fill high-value service and innovative jobs that are critical to driving sustainable economic growth in China". Similar to India, investing in education is seen as having a positive relationship with economic growth.

By implication, what is shown is that neoliberal governance that is rooted in entrepreneurial values of competitiveness, innovation and greater choice in the market, ensures that access to quality schooling, lifelong opportunities and

participation in the world at large are attained. However, the inclusive education exemplified through this investment project supports neoliberal governance that relies on the beneficiaries meeting material conditions in the quest of honing human capital in an emerging country such as China (Guo, Guo, Luke, Dooley, & Mu, 2018). The uneven distribution of wealth further exacerbates the myriad of development issues that are unattended to (World Bank, 2018b) with the lower class in this economy being deliberately side-lined from being part of and contributing to the potential gains that can drive viable economic growth in China.

Consequently, the societal structural inequalities reinforced in Chinese society and rooted in neoliberal entrepreneurial values under the corporate tyranny of both the IFC and Maple Leaf stratifies members of society into winners and losers. The winners are the corporates, i.e., Maple Leaf through the expansion of the company and the IFC through greater returns on investment, and the privileged who possess the economic capital to participate in this elite market. On the other hand, those that assume their role in society as losers have to accept their limited choice and dependency on the state which should provide quality social goods to improve their position in society. The stratification between the winners and losers does not inspire confidence among the less privileged that their lives would be changed for the better by the promised economic growth. This is evidenced in the championed entrepreneurialism that purports to offer the benefit of access to leading universities and opportunities for good job prospects. Ducket (2020) asserts that the socialist neoliberal-looking policies in China have sparked an improved standard of living; however, the simultaneous rise of informal markets with lower wages raises concern. This puts into perspective the stratification of society with some eagerly demanding private education to secure future employment outcomes and others existing just to ensure survival.

Owing to an unequal society governed under a market economy, exclusion of learners in schools as a reflection of society appears to be connected to marketisation and decentralisation. China as the second largest economy in the world passed the compulsory education law in 1985. This made education mandatory for all Chinese children. In effect, this made their education system a glimmering opportunity for entrepreneurs nationally and internationally (Wang, 2017) and also opened up a larger pool for the public system to cater for. Essentially, private organisations such as the IFC and Maple Leaf coming into the education sector was a necessary evil in meeting

the demand for education. Different from India, elitism is pronounced in the private sector specifically targeting the middle- and high-income groups of the Chinese population. However, the advanced market-driven school model offers no prospects of improving the existing public schools to sharpen their competitive edge. The aggressiveness exhibited in seeking to acquire more schools to privatise, speaks loudly of a neoliberal governance that is interested only in upholding its values, credibility and visibility in the market as the ultimate goal. Such an approach opposes an inclusive education in China where learners from poor socioeconomic backgrounds are acknowledged to be a part of the end-game that offers the sought-after supply of future talents offering high value skills and knowledge. In addition, the exclusion propagated by the IFC and Maple Leaf, strips learners from poor socioeconomic backgrounds of their self-worth. The investment in private schools creates a situation where stratification creates large differences in cultural capital, mainly because the private schools provide a curriculum that is aimed at ensuring that learners are bilingual, which then enables them to access opportunities in the global market.

3.5 SOUTH AFRICA

In 2010, under the World Bank Group, the International Finance Corporation (IFC) as part of its 2000 K–12 education (Kindergarten – Grade 12) investment projects, invested R72.7 million in the development of private school education through the Curro Holding Group listed on the Johannesburg Stock Exchange to provide a chain of low-cost private schools across South Africa (IFC, 2010; World Bank, 2012). The investment project sought to establish more schools by 2017 that could offer an affordable first-rate education that keeps up with learning and teaching changes across the educational space, while meeting the demand for high-quality schooling across the country and increasing the chance for graduates to secure employment. The rationale behind this partnership with the IFC was that the public schooling sector in South Africa was plagued by a myriad of structural failures e.g., poor infrastructure, overcrowded classrooms due to a growing population and limited government funding (IFC, 2010). IFC's Director in Health and Education (IFC, 2010) stated that "education is critical to promoting growth and social mobility and we are committed to helping our clients provide quality services especially in areas that lack access. . ." (p. 1). As with the investment projects in India and China, the same goals of economic growth and human capital are upheld. This exposes the relationship between educational

outcomes, poverty and labour market inequalities that should be attended to first (Allais, Cooper, & Shalem, 2019) in realising these two goals of the World Bank.

The neoliberal governance rooted in entrepreneurial values such as competitiveness, innovation, efficiency, decentralisation and greater choice offered here by both corporations is commendable for offering access, opportunities and participation. This new model in education offers its services in varied ways striking a balance between affordability (low-fee) and quality. Nevertheless, this perpetuates the already existing inequalities in South African society as privatisation is not an appropriate alternative in the country's context. The precarity amongst the people in South African society is also raised.

Furthermore, these reinforced structural inequalities in South African societies translate into hegemonic cycles that reinforce the wide differences in people's quality of life due to what they have limited access to. I affirm Harvey (2007) in putting forward that "The role of the state is to create and preserve an institutional framework appropriate to such [neoliberal] practices" (p. 2). In that sense, it is clear that the state is an enabler and shares an interest in these market-oriented solutions as a way of easing its spending burden. The educational investment project reinforces the inequalities that already exist by investing in the expansion of private education in areas where there is a lack of access – similar to India. This shows that the government is failing to meet the growing demand of a growing middle-income population by providing more schools. In addition, the seeming lack of consciousness of the prevailing socioeconomic factors that have historically excluded people still makes it hard for certain groups to compete fairly to improve their economic status. Conjoined, these two issues emphasise the neoliberal value that people ought to be responsible for their own success in society if they wish to share in market-oriented privileges. Therefore, given these societal structural inequalities, the promotion of entrepreneurialism and marketisation ideals, issues of access will remain a problem in the South African economy as is the case with China. Curro (2013) boasts that the increased demand in private schooling confirms the market potential. However, this serves to confirm the unequal realities between members of South African society. In essence, social cohesion and collectivism that eliminate hierarchies of privilege are not prioritised ideals, because neoliberal governance focuses on enhancing "the

workings of free market capitalism and attempts to place limits on government spending, government regulation, and public ownership" (Investopedia, 2022).

Legislative frameworks such as the SASA (DoE, 1996) is contradictory in promising a "national system for schools which will redress past injustices in educational provision, [and] provide an education of progressively high quality for all learners" (p.1), while simultaneously making provision for the establishment of both independent and public schools. Maistry and Africa (2020) argue that the state thus legitimises neoliberal dynamics in education with low-cost private schools posing as the middle-ground "silver bullet" between public and high-cost private schools; however, privatisation is profit-orientated and aimed at enriching the investor more than benefiting the education system as a whole. The presence of low-fee private schools does not promote access and equitable education to all children in the country nor do they address the existing disparities within South Africa. Essentially, they are still out of reach for millions of South Africans. Curro Meridian schools, the cheapest of the school's brands in line with the lower end of the loan deal with IFC, set its tuition fees at R25 878 a year (Curro, 2017) while the median salary in South Africa was R18 502 a year (StatsSA, 2016). This shows that even such low-cost private schools are still inaccessible to the poor and a preserver of elitism for the upper-middle income class. The envisioned social mobility of this investment project therefore applies only to the consumers in the elite market. This is unfair to those who are casualties of societal structural inequalities and inferior education – they are not assured of obtaining leading jobs of the twenty-first century.

Accordingly, this leads to exclusion with schools providing unequal outcomes in competence of learners because of the stratification that privatisation brings to the education system. Beyond doubt cast by scholars such as Klees (2020), Spreen and Kamat (2018) of private and low-cost private education being synonymous with superior quality, unavoidable attributes such small classroom sizes, modern learning facilities, and specialised subjects that equip learners with twenty-first-century skills, verifies private and low-cost private schools as first-class education providers. These attributes set them apart from public schools that cannot provide the same competitive edge and value for money, as in the case of fee-paying public schools, for their consumers; for example, public schools are notorious for overcrowding, high teacher-learner ratios and lack of educational resources (Marais, 2016).

Vally (2020) laments that granted, formal access has improved in post-apartheid South African schools; however, for the poor, the quality of education remains in a terrible state on account of the uneven distribution along social-class lines that make exclusion in education a reality. Supporting this argument is the quintile schooling rankings (Quintiles 1–3) for public schools in South Africa that exclude learners because they are from underdeveloped geographical areas. Schools in these quintiles provide limited opportunities for a quality education; for example, their lack of access to technological resources that enhance learning. The decentralisation aspect holds greater prospects for learners within the upper quintiles (4–5) that have involved parents in determining the outcomes they want to see. This is achieved through the mechanism of the SGB as mandated in the SASA. Common goals are set by the SGB in collaboration with the school staff and provide general oversight to ensure those schools do not lack financially or that internal issues that may impede education are resolved as expeditiously as possible. Therefore, the plight of learners from poor socio-economic backgrounds is impacted not only by private actors such as the IFC but also by the neoliberal governance model that the legislation permits. As de Clerq (2020) echoes, the state in itself is not pressurised enough in implementing meaningful redress measures that should benefit the disadvantaged as a priority.

By implication, inclusive education is like a dream deferred for learners from poor socioeconomic backgrounds as forms of advantage are fortified. Apple (2005) emphasises that “Public institutions such as schools are [perceived by many critics as] ‘black holes’ into which money is poured—and seemingly disappears—but which do not provide anywhere near adequate results” (p. 214). Given the failure of public schools, neoliberal governance frames quality education in terms of providing opportunities and participation as attributes of inclusive education offered by private institutions.

3.6 CONCLUSION

In this chapter I captured the origin and history that propelled the development of neoliberalism as informed by the Washington Consensus and deliberated at length on the global unevenness it has propagated. I provided a review of the World Bank’s STAR project in India and showed that such projects do not provide the opportunity and access features of inclusive education. I provided a review which revealed that

the World Bank's Maple Leaf Educational Systems Limited investment project in China fails to offer any of the features of inclusive education. I provided a review of the World Bank's investment project in Curro Holdings in South Africa that only addresses the access feature of inclusive education. In essence, this chapter has shown that these projects exacerbate existing societal structural inequalities and issues of exclusion for learners in schools. The next chapter looks at the Critical Theory Framework on which this study is grounded.

CHAPTER 4: THE WORLD BANK'S NEOLIBERAL EDUCATION AGENDA: A CRITICAL THEORY PERSPECTIVE

4.1 INTRODUCTION

"There Is No Alternative" (TINA) – Margaret Thatcher (1980-1989)

As cited in Munck (2003, p. 495)

The TINA slogan was widely used by Margaret Thatcher in the 1980s in advocating that the neoliberal ideology was the only solution that guarantees economic success. However, there needs to be an alternative to marketisation as it fails the larger masses. Redressing its shortfalls can be found in Critical Theory. The aim of this chapter is to adopt the Critical Theory as a framework underpinning this study. It serves as a lens to reflect on the World Bank's neoliberal education agenda that posits that there are no alternatives to the principles of neoliberalism in maximising inclusive education. Critical Theory provides alternative solutions that include a critique of the injustices of society, transformation by challenging the hegemonic forces making the status quo unjust, emancipating people from their repressed freedoms and bringing social change in society through democratic values.

This chapter is divided into four parts. Section 1 explains the theory's origins, history and key features of critique, emancipation, transformation and social change. The key message is that Critical Theory is aimed at dismantling hegemony in society and placing the values of social justice and democracy at the centre. Section 2 accounts for the problems and criticisms of the theory. The key message is that the theory can appear to be a form of cynicism and disillusionment and does not present itself as a vital theoretical framework in eradicating any problems in education. Section 3 provides a justification for and discusses the virtues of the theory. The key message is that the theory holds value in considering the envisioned justice and inclusivity in education. Section 4 looks into the usage and effectiveness of Critical Theory in this study. The key message is that the theory can be a vital tool in safeguarding (inclusive) education from a neoliberal agenda. The contribution of this chapter is that Critical Theory provides a compass to use in identifying the forms of power in the neoliberal agenda encapsulated in the neoliberal policies of deregulation, liberalisation and privatisation. The theory aids in finding solutions to the problems of the implementation of inclusive education in schools by promoting socially just and democratic values.

4.2 CRITICAL THEORY: ORIGIN, HISTORY AND EXPLANATION

The philosophy of Critical Theory emerged from the Frankfurt School pioneered by its first generation German-American philosophers: Max Horkheimer, Theodor Adorno and Herbert Marcuse and second-generation Critical theorist, Jurgen Habermas (Edles & Appelrouth, 2007). The theory's epistemology is aimed at understanding the uneven dynamics which exist in society with its axiology seeking values of social justice, equality and fairness to replace the uneven dynamics of oppressive power. In understanding these uneven dynamics, critique (*Kritik*) is a pivotal starting point that attempts to determine how to change society by rejecting injustices and liberating all who are oppressed from their inequalities (Fay, 1975; Thompson, 2017). Following critique, its ontology needs to be defined through critical reflection by the oppressed on their unjust realities. It should be noted that the theory seeks not to impose its own values onto the world but rather to engage with the values causing inequalities in order to overcome them by not merely accepting them as they are imposed on us (Lee, Wong & Chong, 2011). In essence, this marks critique, emancipation, transformation and social change as the fundamental elements of the theory.

In the aftermath of the 1917 Russian Revolution, Critical Theory was mined from key Marxist ideas in that industrialised societies are oppressive towards the working class and threaten the social order. Therefore, its development as a movement to theorise how change should take place to dismantle this class domination in society. In that, Horkheimer (1972) postulated the goal of the theory was "man's emancipation from slavery" (p. 246). In contextualising this emancipation, historical dimensions need to be considered first as a guiding tool to begin dismantling current inequalities as they are the cause of current day problems (Horkheimer, 1972). Therefore, its methodology follows the cause-and-effect relationship of entering into dialogue that reaches understanding (*Verständigung*) and common ground (*Einverständnis*) of what the oppressed envision as the future (Habermas, 1979).

Critique refers to questioning the social order and identifying social problems to adequately resist the unequal power dynamics in society (Horkheimer, 1972). In other words, reflecting on the social changes that ought to be made given the dominance between those who hold power and how that defines relationships (hierarchies) in society. In this regard, relations between the subject and object can be

comprehensively understood. Critique however offers a broader meaning than merely questioning or resisting the status quo; critique can encompass validating instances that offer positives. In essence, the key elements of critique whether negative or positive need to be aimed at deconstructing and reconstructing conceptions of a better life (How, 2017). As Parker (1995) postulates, values need to be central when offering critique as perceptions of truth differ from person to person. Truth itself, however, does not change. Thus, the conception of a better life is rooted in axiological values of justice and equality, which are the hallmarks of democracy. If these are left unrealised, society can be critiqued as failing its own potential.

In this study, the elements of critique assist individuals in questioning the World Bank's neoliberal public policy that dwells on a neoliberal lending agenda and identifies how it leads to unequal power relations within the global village (Global North vs Global South and East). The World Bank is the actor identified in entrenching unequal power dynamics. This imperialistic approach means that the World Bank as the ideological proponent and lender from the Global North dictates the policies to be carried out by borrowing countries in the Global South and East. Conversely, positive consequences arising from the World Bank's neoliberalism are increased efficiency and innovation in these regions. In stating that these concepts lead to the creation of a better life can be recognised as serving a positive purpose, the test lies in people affected in society questioning whether the World Bank's efforts are aligned with inclusive education or the Education for All agenda. In linking this to the theory's axiological values, as also reflected in the literature review, individuals can resist the societal structural inequalities that neoliberal governance ushers in through neoliberal public policies in education that widen inequalities and entrench injustices. Consequently, stances towards disrupting the status quo such as the World Bank thriving off neoliberal public policies that work against access, opportunities and participation for all in education, can restore these values to the centre. Edles & Appelrouth (2007) identify how the elite are power-hungry and will do whatever it takes to gain and maintain this power and status quo. Therefore, questioning, identifying and resistance leaning towards more sustainable solutions to fairly assist individuals in society can mitigate the crisis created by the growing success of their neoliberal agenda with its desire to assert more dominance.

Emancipation refers to liberating people from the unjust status quo in order to attain their full freedoms (Horkheimer, 1995). Horkheimer (1972) encapsulates the idea by referring to them as “circumstances that enslave them” (p. 244). Accordingly, the key elements of emancipation seek to fulfil the first condition of achieving freedoms through critical reflection on its ontology that raises consciousness of the need to attain these full freedoms. Becoming aware of the conditioning that has led people to accept the status quo is the first prerequisite; this means people can form a collective to challenge the status quo in order to counter the hegemony (Marcuse, 1973). The status quo is only strengthened when it goes unchallenged and the existing circumstances are allowed to continue and to be reproduced. Therefore, deeper consciousness that leads to sound reasoning serves a role in ameliorating these conditions is not enacted. This happens during interpersonal interactions where communication among the collective leads to a common understanding of the unjust status quo and enables it to embark on appropriate actions to disrupt the status quo (Habermas, 1979). Similarly, as critique suggests the deconstruction and reconstruction of power for a better life, so does emancipation through people reconstructing their reality by taking collective action.

In this study, upon critical reflection, the elements of emancipation suggest that World Bank’s public policy leaves a majority of learners in the Global East and South exposed to the demands of a neoliberal agenda that requires people to have the economic means to acquire a high-quality education. Critical Theory allows for people’s consciousness to be raised in understanding that the unjust status quo inhibits the attainment of their full freedoms and equality through the education system. Conscientisation arouses the awareness that the neoliberal agenda exists only to serve the interests and maintain the hegemony of the elites. Furthermore, the theoretical framework assists individuals to attain their full freedoms by challenging the hegemony of neoliberal governance side-lining those with no means to be participants in its agenda. Specifically, having developed individuals’ understanding of the status quo, the theoretical framework assists those denied the maximised benefits of education namely, parents and learners, in South African schools by providing ways to engage with the state. This includes defending their interest in the eradication of problems such as poor infrastructure, outdated learning systems and overcrowded classrooms that strip them of an education that gives them a competitive edge. In this

way, reconstruction of their reality applying the prerequisite condition of conscientisation will bring them freedom with a quality education for all being attained.

The role of transformation ideally rests on changing knowledge (what we know) of the world. Transformation addresses the exclusions and inequalities experienced by people in society (Thompson, 2017) and supports the values of social justice and equality. Marcuse (1969) encapsulates this thought in saying “the awareness of the transcendent possibilities of freedom must become a driving power in the consciousness and the imagination which prepare the soil for this revolution” (p. 79). In that sense, the elements of transformation need to occur through critical thought and the practical aspects involved in making this change (Thompson, 2017). Transformation ushers us into considering how power will be redistributed to the formerly excluded members of society.

In this study, transformation encompassing critical thought assists individuals in society by creating a sense of urgency to safeguard the value of education as a social good that is offered at a high-quality standard for all and to ensure that the excluded are included. The knowledge that society has come to acquiesce to the World Bank’s neoliberal education agenda that expands global unevenness, social structural inequalities and exclusion of learners on schools, combined with the knowledge of the elements of emancipation helps society to take practical steps to challenge the status quo. Specifically, these practical steps would see individuals being more proactive in challenging state decisions that directly affect them. To elaborate, power determines which versions of reality are to be accepted; e.g., power deeming the less privileged less deserving of high-quality education. Ultimately, the dominion of the elite to dictate public policy packages on what is good for society needs to change. This is vital as it contradicts the values of inclusive education as a drive to provide the disadvantaged and marginalised with a fair opportunity to gain power through education. Society and schools are constantly changing in themselves. In that regard, to address the negative consequences of a neoliberal world-order, solutions underpinned by the key aspects of transformation, namely, critical thought, formation of new knowledge and practical steps, will ultimately lead to the state regaining its authority in providing the social good of education.

In the struggle for balancing power between those perceived to be winners and losers, social change is only attained when the inequalities and exclusion of some people in

society have been redressed (Fay, 1975). Correspondingly, the key elements in addressing imbalances of power and privilege involve those who held very little power being allowed fair representation that does not merely exist in theory, but provides meaningful empowerment that equips them as active agents in the quest for social change. Horkheimer (1972) noted this crisis of unbalanced power dynamics in his assertion that social relations change over time as a result of the economic developments impacting the social fabric of society. Therefore, envisioning of the future that we seek to put in effect for meaningful social change needs to be underpinned by targeting the elements that stratify and give rise to the domination of some over others (Marcuse, 1969).

In this study, social change addressing imbalances of power and privilege refers to engagement in the ongoing struggle with the World Bank's neoliberal policy package that has defined education. When it comes to addressing the imbalances of power and privilege, the theoretical framework assists individuals to engage with the issues that lead to the exclusion of the poor from the maximised features of an inclusive education that the privileged are easily afforded. Such engagement would initiate change so that the right to equal access to quality education could be guaranteed for all. Furthermore, through this engagement in the ongoing struggle, the theoretical framework helps individuals become more empowered in their learning and the opportunities it can lead to. In recognising the call for social change in education, the World Bank should be focused on providing practical steps to equip learners to be empowered active agents. This can be done by changing the focus of its educational initiatives to be rooted in democratic values of consensus, justice and participation which are simultaneously congruent with the inclusive education philosophy. Essentially, the focus on democratic values to bring about equality assists individuals in the eradication of social stratifications that disempower them in terms of the differences in purchasing power (Marcuse, 1969). Ultimately, Critical Theory highlights the possibility that privileges can be afforded to all.

4.3 CRITICAL THEORY: PROBLEMS AND CRITICISMS

Fay (1987; 1975) argued that the theorists of the Frankfurt school based their theory on a sequence of suffering and constant reflection. He added that the theory's advocacy of critical thinking and reason is limited by individual experience. Therefore,

reconstructing and deconstructing issues of power is influenced by people's perceptions about what freedom is. These perceptions could be distorted and skewed. This stance is reinforced by How (2017) and Popper (1994) suggesting that the theory is unlikely to solve problems as it finds little purchase in modern-day society. This alludes to critique validating positive changes but eventually finding fault in them regardless. Braun (2016) further asserted that Critical Theory offers no practical solutions on how society can develop a uniform approach to challenge the status quo. The theory is thus impractical in solving societal problems. These authors' diagnosis of the lack of transformation and constant critique of societal injustices present the theory as having a short-sighted understanding of societal dynamics and posit that it is, in itself, dictatorial (Wright Mills, 1944, cited in Edles & Appelrouth, 2007). For the empiricist and positivists who base their theories on objectivity, the theory presents limitations as the knowledge derived cannot be tested; therefore, it fails to qualify as knowledge that presents any value. Being social-value laden, the question arises about whose axiology, comprising social justice, equality and fairness, is better in establishing the actual ontology of society. Is one not simply replacing one form of dominant thinking with another? Consequently, this subjectivity places doubt on the theory's ability to bring about the social change it wants to achieve (Fuchs, 2016).

By implication, these criticisms of the Critical Theory lead to the conclusion that it is not useful in eradicating the inequalities engendered by the neoliberal agenda. Thus, emancipation needs to be reconfigured by taking into account the individual whose access, opportunities and participation are limited and maximising their access to inclusive education in all its facets. To elaborate, those seeking to explore their entrepreneurial freedoms and those willing to explore this elite market are equally justified as being given priority to venture in the educational space. However, resistance, raised consciousness and sound reasoning are difficult to enact in correcting the power imbalances that both advocates of neoliberalism and critics of the Critical Theory alike do not regard as problematic. This aligns with the notion of TINA that posits that the status quo must be maintained; e.g. How (2017), Karl Popper (1994) and Braun (2016) find that neoliberalism contributes positive solutions and brings progress, even though stratification may follow. The negatives implications of the theory for inclusive education make application difficult because of its conservative values that are not open to all innovative solutions that lead to possible viable practical

steps. As Marx (1997) suggested the aim is to “show the world why it actually struggles” and is “taking sides [...] with actual struggles” (p. 214) – which the Critical Theory also seeks to achieve. However, with individuals’ newfound knowledge to overturn the status quo and facilitate the transformation process, essentially the theory is subjective and consequently the solutions chosen to propelling inclusive education would be subjective. Hence, the theory does not validate the identified on-going struggle against injustice because of the varying levels at which inclusive education is implemented. Therefore, conceptions of the envisioned social change by opponents of the theory mean that the values governing the distribution of educational opportunities offer a flawed solution.

4.4 CRITICAL THEORY: VIRTUES AND JUSTIFICATION

Horkheimer (1972) states that “truth for Critical Theorists is found in personal thought and action, in concrete historical activity” (p. 222). Therefore, the theory is based on informal logic (critical thinking). To elaborate, the theory holds that processes involved in attaining emancipation cannot be separated from the aspect of emotional and personal values in diagnosing (critiquing) societal injustices. Accordingly, their declaration that they truly know what is holding society back (identification of who the oppressors and what injustices there are) and how we should envision a better future, provides a factual foundation that gets us to the point where we can embark on transformation. Further, Marx (1997) implied that the self-understanding of society is based on its struggles and aspirations. Therefore, engagement between thought and action maps out social change that does not leave any members of society without opportunities or on the margins as the newly defined social order advocates for equality.

The virtues of the Critical Theory framework are thus relevant to the study in that it posits that inclusive education and schools are vital in empowering people (learners) through maximised access, opportunities and participation in order to transform and address the inequalities that exist in society. The theory’s feature of critique creates a starting point for questioning the neoliberal ideology that contributes towards exclusion of learners from schools so as to resist the neoliberal agenda (as the status quo) instead of its being allowed to continue pervading society. This identified categorisation of the neoliberal agenda allows for the reaffirmation of the principle that

schools should being democratised sites of power to maximise the tenets of inclusion. The emancipation feature provides tools for the excluded majority in a fully conscientized society to challenge the neoliberal governance whose entrepreneurial freedoms impede others from accessing a high-quality (inclusive) education. The transformation propagated by the theory is that there must be an equal distribution of high-quality education across the education system if the principles of an inclusive education are to be fully implemented with the aim of empowering all learners in schools. In essence, in the quest to transform education, the theoretical framework holds itself out to be the mouthpiece for the majority that is silenced by the dominating neoliberal forces. In effect, the social change that the theory proposes will change the status quo to one where these is a diminished demand for privatisation with better quality being found in the public education sector and more stringent regulations when it comes to safeguarding the social good. In a twofold manner, imbalances of power will be corrected and financial privilege that ostensibly opens up more opportunities to the job market will not have any influence in the post-schooling years as the entire education system will not operate on stratified lines in terms of quality. Therefore, to bring a halt to disadvantaged learners' on-going struggles, Critical Theory demands that the state as the one accountable for provisioning a social good to its citizens actively works towards dismantling marketisation forces that are rampant in the current education system.

4.5 CRITICAL THEORY: USAGE AND EFFECTIVENESS

The use of the Critical Theory in ensuring the implementation of inclusive education in schools helps to identify the hindrances to achieving the envisioned goal. Using the Critical Theory helps to determine how the state maintains the neoliberal agenda that supports World Bank's neoliberal public policies that establish power dynamics which are not conducive for the inculcation of values of social justice, democracy and inclusivity. Furthermore, this identification aids in the understanding of why exclusion is sustained in education by oppressive public policies manifesting socially, economically and politically that the state is lax in countering. Therefore, the framework opens the window to deconstructing and resisting marketised approaches in education that impede the envisioned better life that all schools should be evenly accorded. Together, questioning, identifying and resistance make it easier to determine the steps that broaden access, participation and opportunities in order to

solve the problems that privatisation occasions, such as some learners having more skill and competitive advantage than others. Using the critique tenet contributes to reconstructing schools as sites where all human potential is advanced equally through a rights-based education.

The use and effectiveness of emancipation for inclusive education schools becomes relevant in providing value in raising the consciousness of consumers (learners and their parents) about the hindrances to their full freedoms such as extensive deregulation, liberalisation and privatisation in education. Accordingly, with consciousness raised, as Freire (1970) posits “If humankind produce social reality, then transforming that reality is an historical task, a task for humanity” (p. 51), parents and learners from the poor socioeconomic levels in society are able to work towards inclusive schools that offer quality education when they become conscientised to actively challenge the status quo in the quest for their liberation from the neoliberal agenda. In other words, collective subjects and stakeholders in education who are excluded, can fight to overturn the status quo thus bringing change to the way in which power is organised in all schools collectively and individually. Inclusive education is more than simply a right to be fulfilled to liberate the lives of all but serves as a social good whose by-product of knowledge changes the trajectories of opportunities that one can take advantage of in the future. These opportunities ought to be afforded to learners from all socioeconomic backgrounds as they also acquire social mobility from the high-quality education that they are entitled to. Therefore, agency is added to the features of inclusive education, namely access, opportunities and participation, and emancipation, namely, freedoms and consciousness. This tenet changes the way that schools and learners operate, validating their struggles and offering hope that they too can share in the privileges inclusive education can offer.

The use and effectiveness of transformation for inclusive education in schools’ function on a thought-and-praxis relationship. This relationship is effective in offering help in addressing the barriers of market forces prescribing the rules in education that serve the interests of a few and therefore needs to be acted upon. Essentially, transformation offers schools an opportunity to actualise the inclusive education that keeps to the Education for All agenda where all three of its key features go beyond theory: access that is beyond formal schooling, opportunities that go beyond school completion and participation to compete and thrive on a global scale. In essence, the power to succeed

will be evenly distributed to learners across schools to realise their full potential through the acquisition of meaningful skills and knowledge, thus adding to the nation's human capital. Transformation shaping people's knowledge of what inclusive schools should be like, contributes to eliminating existing issues of overcrowding, poor infrastructure and outdated skills in public schools which could then be defined as sites offering a high-quality education. Accordingly, the state ought to be accountable for implementing inclusive education in schools by fixing and addressing these areas impeding the transformation of public schools experienced by the majority of excluded learners in South Africa.

The use and effectiveness of social change as a feature of Critical Theory in ensuring inclusive education in schools combines the features of critique, emancipation and transformation as values to be used to get us to realise the outcomes of social justice and democracy in education. The imbalance of power and privilege that have come to stratify schools amongst classes will be better addressed through increasing people's social mobility. These democratic ideals serve as catalysts to be used together in enacting inclusive education across all schools in a just manner. In other words, social change affirms the intention of the philosophy of inclusive education as espoused by Klees (2020) of redressing meaningful access, opportunity and participation that has not been equally distributed as evidenced in the literature review. Ultimately, social change realised through inclusive education addresses the ongoing inequality struggle by fostering inclusive schools where all learners are marked as winners. As Fuchs (2016) suggests, it will allow them to be more than simply individuals that are confined to a specific social class. Social change contributes to equality in consumer satisfaction when the public education system has strengthened its quality and efficacy in the market which should diminish the demand for private education that already had these attributes. With social change, public schools imbued with inclusive education values will be characterised as sites where the social benefits of education are actualised.

4.6 CONCLUSION

Critical Theory emerged as a neo-Marxist school of thought. The features of the framework affirm that having engaged in critique, being emancipated and driving transformation of the status quo by challenging it, positive social change through

thought and reflection leads to understanding the World Bank's education agenda. In this chapter, I provided a balanced view of the problems and criticisms that make the theoretical framework limited in eradicating the problems identified in education. In addition, I presented its strengths as a suitable theoretical framework for this study. Lastly, I showed its relevance in propelling and safeguarding inclusive education in post-apartheid South African schools. This chapter has shown how there is a disjuncture between the World Bank's neoliberal agenda and the values of inclusive education. Chapter 5 follows with a critical review of the World Bank's inclusive education policy in post-apartheid South African schools using the features of Critical Theory.

CHAPTER 5: CRITICAL ANALYSIS OF THE WORLD BANK'S INCLUSIVE EDUCATION POLICY IN POST-APARTHEID SOUTH AFRICAN SCHOOLS

5.1 INTRODUCTION

> Realising a vision of an educational system that is accessible to all, fosters participation, enables belonging, and results in powerful learning is not easy. This difficulty is caused by the pervasiveness of exclusionary pressures in education that have the potential to confound and constrain efforts towards greater inclusivity (Walton, 2017, p. 85).

As noted by Walton (2017), establishing a solid education system has many benefits but there are also many stumbling blocks in the quest for greater access, opportunities and participation. The aim of this chapter is to provide a critical review of the World Bank's neoliberal education agenda by looking at its inclusive education policy through the lens of the Critical Theory[3]. In doing so, we can assess whether the key features of inclusiveness are met by implementing this policy.

This chapter is divided into four sections. Section 1 provides a review of the Critical Theory criteria which are used to assess the World Bank's inclusive education policy. It presents the key questions to be used in assessing whether the policy adheres to the tenets of Critical Theory. Section 2 provides an evaluative analysis of the 1999 *World Bank's Education sector strategy* policy paper and the 2011 *Learning for All: investing in people's knowledge and skills to promote development – World Bank Group Education Sector Strategy 2020* policy document by looking at how these policies contribute to global unevenness, societal structural inequalities and exclusion of learners in schools. The key message communicated is that the World Bank's inclusive policy meets only the emancipation criterion – but falls short on the transformation, social change and critique criteria. Section 3 provides a theoretical analysis of the positive (areas of agreement) and negative (areas of disagreements) aspects of the World Bank's education agenda (inclusive education policy and projects) in post-apartheid South Africa. The key message is that the World Bank's education agenda offers positives in that it propels society's and learners'

[3] The educational agenda in this report has been discussed in terms of the educational projects described in chapter 3 and the inclusive policy of the World Bank that is introduced and deliberated on in this chapter.

emancipation in facilitating the realisation of inclusive education in South African schools. Section 4 offers the central argument that acknowledges the positive (inclusive) and negative (exclusionary) role of the World Bank's agenda in post-apartheid South African schools. The key message is that the World Bank's neoliberal agenda – and by implication its education projects and inclusive policy to a limited degree – can assist in realising inclusiveness in South African schools. Furthermore, it also communicates that to a large degree the neoliberal agenda diminishes any opportunity for inclusive education to be realised in South African schools. The contribution made by this chapter to the report reveals that the World Bank's neoliberal agenda i.e., inclusive policy and projects regrettably exacerbates global unevenness, societal structural inequalities and exclusion of learners in schools. The clear picture emerging is that its presence does not meet the criteria of Critical Theory with the end goals of democracy and social justice.

5.2 CRITICAL THEORY CRITERIA

In providing a critical review of the implementation of the World Bank's *Education Sector Policy Paper* (1999) and *Education Strategy 2020* (World Bank, 2011, 2020) in post-apartheid South African schools, the researcher poses the following questions using the features of Critical Theory:

- Does this policy document focus on promoting emancipation by allowing the full freedoms of learners and consciousness to be exercised through a high-quality education for all?
- Does the policy document reflect transformation that takes into consideration new knowledge formed through critical thought and the practicality of including the excluded?
- Is the policy document reflective of a social change that addresses the imbalance of power and the ongoing struggle for the right to equal access to education?
- Does the policy document, through questioning and identifying, critique the problems of a neoliberal agenda in terms of how it creates unequal power dynamics between independent and public schools?

5.3 EVALUATIVE ANALYSIS OF THE WORLD BANK'S INCLUSIVE EDUCATION POLICY

Emancipation refers to liberating people from the unjust status quo in order to attain their full freedoms (Horkheimer, 1995). The *Education Sector Policy Paper* (World Bank, 1999) emphasises educational liberation through a high-quality education by asserting:

> There is little point in expanding access unless there is reasonable quality. If people are not gaining *the emancipation* [emphasis added] through knowledge, skills and values they need, resources invested in teaching and learning are wasted. There must be, in policy and actions, an unrelenting concentration on learning. Quality is the key to achieving the imperative for the new millennium – an educated, skilled population who can operate in democratic societies and meet changing labour market needs. (pp. 4-5)

In essence, the quote from the policy paper reveals its intention to offer emancipation to learners. There are three main positives worth noting. Firstly, it addresses the need for emancipating learners from the unjust status quo of a high-quality education not being available to all as an imperative. Secondly, prospects of society being reconstructed along with the type of urgency to be exercised in governance is exhibited. Thirdly, this quote addresses the key tools (knowledge, skills and values) that unlock freedoms to challenge the status quo in education. This moves beyond education being merely about pouring resources in without addressing the quality element to bring about meaningful learning. Therefore, the tools are described and an explanation of how to implement them to meet the labour demands going into the new millennium is provided. Thus, empowerment can be ensured with action being taken to maximise inclusion for all through forward-looking strategies.

In linking this analysis to the neoliberal public policy dimension, it is evident that *deregulation* is not positioned as antagonistic to inclusive education. This can be justified as the greater access deregulation provides is not supported without the necessary tools being in place to implement it in a practical manner. Neither the IFC or the IBRD should provide financial resources without the necessary outcomes being realised. In essence, deregulation does not reinforce the negative aspects of laissez-faire ideologies that do not evenly distribute educational opportunities but instead

allows the fulfilment of freedoms and shows the possibility of ensuring social mobility for all with access to quality being linked to opportunities for achievement and participation. Thus, deregulation in both schooling systems in South Africa opens up a way for greater development of learners' ability to be conscious individuals. In addition, *liberalisation* is reflected as stakeholders' freedom to invest resources is encouraged rather than relying solely on the state to provide a high-quality education. Evidence of this is seen in the non-specification of who should be the actors offering access to education but instead offers a guide to all who choose to be involved. In retrospect, as mentioned in the literature review, the private sector (IFC, 2010b; 2014; World Bank, 2020a), being able to take more risks needs to ensure that policies and actions lead to the provision of quality inclusive education in South African schools. This can provide a standard for the public sector to adopt in public schools in terms of how to be innovative which has been shown to lead to efficiencies in education with the spin-off of better quality. Resources can be redirected to areas of greater need. Taking its lead from what has worked in the *private sector*, the public education system could adopt innovative practices with calculated risks for maximised realisation of inclusive education in schools.

Transformation ideally focuses on changing what we know of the world and society through critical thought and embarking on the practical aspects involved in making this change (Thompson, 2017). Therefore:

> … [the] Education Strategy 2020 sets the goal of achieving Learning for All to *aid in transformation* [emphasis added]. Learning for All means ensuring that all children and youth – not just the most privileged or the smartest – not only can go to school but also acquire the knowledge and skills they need to lead productive lives and secure meaningful employment. (p. iv)

Upon surface evaluation, this quote is reflective of education transforming the lives of all children. This is seen in three ways. It looks into addressing stratifications brought about by the uneven status quo and improving the state of living for those from poor socioeconomic backgrounds and the exclusion that prioritises only clever learners who contribute to the prestige of school rankings. Transformation positively responds to the inclusive education philosophy by providing more social opportunities and enhancing the achievements of learners (Slee, 2018). However, from a deeper perspective, the policy document does not inspire transformation. These concerns are justified on two

counts. Firstly, learning for all is still stratified with entrepreneurs determining who they choose to benefit from receiving a quality education. Therefore, the forward-looking goal of creating an education that ensures the acquisition of skills and knowledge and that holds lifelong benefits by opening up opportunities for employment is based on a false promise. Secondly, this is evidenced in the literature that the common positive rationale of economic growth and human capital as an asset is behind all the investment projects of the World Bank. However, an investigation into the projects reveals that they have exclusionary negative outcomes.

Accordingly, the two positive idealisations that emanate from the *Education Strategy 2020* seeking to overturn the crisis of learners being out of school whether on matters of privilege or intellect backed against the three negative practices bring us to a disjuncture of this idealisation faintly operationalising. This claim can be made on account that in reality, the policy only serves as a vision into the future but its potential of being carried into practice does not have transformation that makes a change that all children can be benefactors of. Evidence of this can be seen when we recognise that the policy's primary commitment is to obtain *education for all*, however, in questioning that commitment despite learners acquiring the envisioned knowledge and skills, there is still little change in securing meaningful employment. Justification of this claim can be seen in the educational projects that create an uneven start that stratifies against the possibility of those that will secure 21st century leading jobs against their limited possession of skills and knowledge. In essence, *education for all* actioned out as a progressive realisation of rights requires equal commitment to the eradication of the neoliberal exclusionary practices. In this regard, these neoliberal exclusionary practices are the roots to be confronted if there are hopes for this policy to translate as more than an ideal.

In linking this analysis to the neoliberal public policy dimension, it is evident that *deregulation* as a legislative tool is a starting point where the playing field is not even. By virtue of lesser socioeconomic constraints, privileged learners from independent, private schools reap better rewards from the knowledge and skills that are offered to them by virtue of the better functioning of the private education system. Access as a goal of the policy is limited to the notion of formal access (Vally, 2020). Formal access is commendable in that learners of school-going age who are regarded as vulnerable groups in society form part of the education system. However, the differences in

practical steps taken between independent and public schools in how learning and education is imparted (i.e., teachers with the best expertise and resources available to schools) translates to wide differences in access to the opportunities for employment for learners exiting the school system. Therefore, the excluded are not able to take advantage of these opportunities as they are not equally competitive.

Liberalisation increases exclusion because the school system encourages competition based on an academic hierarchy. Therefore, the smartest learners in school will always be prioritised with schools in the private market having the ability to insist that learners take standardised assessments. The *WBES 2020* (World Bank, 2011) affirms such assessments in declaring that "the level of skills in a workforce – as measured by performance on international student assessments such as PISA and TIMSS – predicts economic growth rates far better than do average schooling levels" (p. 25). Essentially, these assessments are a qualitative tool used to determine their prowess. This shows that these schools are like businesses that place greater emphasis on efficiency than on an inclusive educational experience. *Privatisation* contributes to the argument in that its premise is to take up market share whether through the establishment of schools as businesses or by preparing their consumers (learners) to take advantage of the most beneficial employment opportunities. Therefore, there is a gap between the philosophy of inclusive education (no stratification) and the lack of transformation informing the present reality (unequal benefits between independent and public schools and within public schools). The envisioned praxis of all having productive lives to contribute to establishing strong human capital is a fallacy as learner competences of the privileged compared to those from poor socioeconomic backgrounds and rural schools do reflect an education that is inclusive in South African schools.

Social change refers to the transformation of society by having redressed the inequalities and exclusions that have defined the social order (Fay, 1975). Therefore, the *Education Sector Policy Paper* (World Bank, 1999) asserted:

> The long-term goal for *social change through* education [emphasis added], should be nothing less than to ensure that all people everywhere have the opportunity to (1) complete a primary and lower secondary education of at least adequate quality, (2) acquire essential skills to survive and thrive in a globalising economy, (3) benefit from the contributions that education makes to

> social development, and (4) enjoy the richness of human experience that education makes possible. (p. 6)

This quote is reflective of working towards social change in terms of exclusion and inequalities that have shown that quality education is out of reach for many. The long-term goals are emphasised in the key features of inclusive education, namely, that access needs to be of adequate quality and skills need to be developed to sharpen learners' competence and improve their level of participation as productive citizens by contributing to society. Therefore, the on-going struggle for the right to equal access to education is acknowledged. However, in propelling social change, the policy paper (World Bank, 1999) falls short on the primary concern that attaining the right skills through education will guarantee that everyone will thrive in a competitive globalised economy. By implication, the development of human capital with tradeable skills, as also seen in the investment projects the World Bank undertakes, assumes that the end goal of economic growth will be ensured. Therefore, the educational terrain should not be left open to manipulation by neoliberalist stakeholders.

Ideally, this quote from policy inspires confidence that thought for various concerns in education are planned strategically and are forward-looking. However, what is not clear in the long-term goal of the policy is where the ideal and practice converge. That is, an understanding of what practices would entail the said adequate educational quality, skills, and the exact contributions towards social development are successfully executed as the idealised reality. Put differently, greater stipulations of how these goals can be made more attainable regardless of contextual differences (when practice demands that they be applied in post-apartheid South African schools) are necessary. In consideration would be questions of how post-apartheid schools comprehend and relate to these goals? And how are South African schools supported to ensure each of these goals is realised? Concise guidelines that answer these questions make it possible to translate the ideal into practice. Consequently, without a more comprehensive step-by-step guide of these goals, the future reality is forecasted as being without social change and regression in the promotion of educational rights.

In linking this analysis to the neoliberal public policy dimension, it is event that *deregulation* does not ensure social change. Against the backdrop of having two types of schools in the South African education system, phrases such as "… education of at

least adequate quality" in the South Africa Constitution (RSA, 1996, s.29(1)(a)) suggests that public education should use this as a benchmark. The imbalances of power and privilege in this regard clearly indicate the lack of political will in ensuring equal distribution of resources and a rounded opportunity to possess well-developed skills to thrive in a globalised economy. Therefore, access, opportunities and participation remain limited in some schools.

Liberalisation serves as a tool to ensure education is accessed everywhere especially in response to demand and supply factors that the state cannot meet on its own. The provision of education at a basic level requires the strengthening of a weak public education system so as avoid some public schools resembling neoliberalist organisations in themselves without efficacy issues preventing some poorly-resourced public schools from providing skills to learners so that they can thrive in a globalised economy. Otherwise, the maximisation of inclusive education will remain unequal in public schools in South Africa.

Privatisation draws the stratifying lines on who will have greater life prospects and how they will get to that point on the grounds that private schools provide education of superior quality than that offered through basic public education. Additionally, the power held by global elites that propagate privatisation by prescribing the rules and changing the goalposts of what is deemed sufficient for thriving in a globalised world makes it difficult to contribute to social development without the possession of the right skills. To elaborate, privatisation holds the golden card that, regardless of access being granted to all, the hegemony makes it clear that social classes will always exist and will be determined by the levels of quality education received from the different schools in South Africa.

Listing the above features provides a critique that focuses on identifying and questioning the power dynamics in society (Horkheimer, 1972). The *Education Sector Policy Paper* (World Bank, 1999) holds its position in providing a neoliberal inclusive education through the IFC by asserting:

> *In critiquing the shortfalls of the state* [emphasis added] and to ensure targeting towards lower income groups, [the World Bank Group] recommends that the IFC play a role in the further development and nurturing of that private segment of the education market that expands education opportunities for low-income

> students. IFC financing of secondary and higher education can help facilitate the redirecting of government subsidies to the poor, where they belong. The more that better-off families pay for education as they do when they choose private education, the more the government can use its resources for the poor. (p. 19)

This quote can be seen in a positive light as it identifies that exclusion is created when the state alone needs to fund education and promotes the idea of greater opportunities for education to be accessed through expansion of private education. Critical Theorists would agree with the adage[4] that "all animals are equal but some more than others" (Orwell, 1954, p. 112); the same reasoning can be applied in prioritising the needs of those in less than advantageous circumstances, such as the rural poor. This calls for redistribution of resources to at least come close to reaching an equilibrium in the quality of education offered by public and private schools. However, identifying the IFC as the executor of the positives also positions it to be critiqued with regard to its neoliberal agenda that entrenches unequal power relations in countries of the Global South such as South Africa. By implication, looking at the bigger picture, the IFC's agenda creates unequal societies where low-income groups are placed in the unfortunate position of having to compete with those from the private sector which empowers only the smaller elite market. Furthermore, it is paradoxical that the IFC's concern is for the plight of the low-income socioeconomic segment of society yet it chooses to ensure expansion of inclusive quality education through funding models that make such education unaffordable for the low-income group. The situation described here reproduces the status quo where all human potential is not equally recognised: those who have the financial means to afford private education have access to innovative global opportunities that give them a competitive edge while the situation of the poor is only marginally improved even though the government now has a smaller pool of learners to service.

To reiterate, the policy identifies quantifiable reasons why the state cannot act alone. However, the paradox in studying the IFC's involvement as evidenced in the educational projects has this quote torn in between being progressive in its idealisation and regressive in how the practices are experienced in reality. Nonetheless,

[4] Both the Critical Theory and the adage from Animal Farm offer similar ideas that stemmed from the events of the Russian Revolution.

paramount to the cause of inclusive education, this tug is not helpful in redressing and fostering more meaningful change for all learners. The honeyed words that promote neoliberal agendas bait the public sector under assumptions that in their responsibility a lesser pool guarantees greater learning outcomes. Furthermore, the unspoken effects in reality of such actions that encourage the mushrooming of private segments (private schools) cannot be the silver bullet if educational rights are truly idealised to induce a more progressive reality. Critical to this point is to question whether the invention of this is policy is directed towards legitimately changing the status quo or is it to further legitimise the World Bank's neoliberal dominance in education that does not fully take into account educational conventions aligned to steer quality inclusive for all with equal outcomes as a reality. In locating rights in education as regressive, the evidence leads to a more telling future reality that we are stuck with ideals that will continue rearticulating the same neoliberal stances in the World Bank's policy revisions.

In linking this analysis to the neoliberal public policy dimension, *deregulation* that legitimises the educational role of the IFC benefits the market players in this sector; in effect, driving competition between private and public schooling under the guise of unburdening state provisioning of the social good. Deregulation in public schools, for example by the establishment of SGBs, does not ensure that the larger subsidies and resources provided will be used effectively since maladministration with competition between schools is also growing (Rangongo, Mohlakwana, & Beckman, 2016). Therefore, beyond face value, the solution presented by the IFC counteracts the idea of maximised inclusive education across all types of schools in South Africa as power dynamics are left unchanged.

Liberalisation to participate and take advantage in the private education offered by the IFC is unlikely to be attainable by the poor (Conteh, 2014). Therefore, although some learners will be taken out of the public education system as they take advantage of low-cost private education such as that offered in the Curro schools model, the public sector overall and the public education system, in particular, still needs to be strengthened. Otherwise, there will be no observable progress in implementing inclusive education in schools which would provide a foundation for the social mobility of all learners. Regrettably, liberalisation adds pressure and uncertainty to the public education sector.

"*Privatisation* undermines the right to education" (Spreen & Kamat, 2018, p. 17). By implication, in critiquing the status quo and offering solutions to the problems in the current education system, the World Bank policy document in itself propagates the neoliberal agenda with privatisation always being the best market solution. In effect, there is very little that the feature of critique can do to leverage the influence of privatisation given the role it adopts as a saviour. In the midst of a growing population, even with the said reduced pool that the public education system has to cater for, issues that limit inclusion such as overcrowded classrooms and outdated curricula remain the social order and call for IFC funding interventions. Therefore, the promises of privatisation do not work to strengthen the capacity of the education system as a whole to provide quality education to all.

5.4 A THEORETICAL ANALYSIS OF THE WORLD BANK'S EDUCATION POLICIES

5.4.1 Areas of Agreement

The benefits of neoliberalism described in Chapter 2 and the review of literature in Chapter 3, under a Critical Theory perspective, all indicate that the concept of emancipation can facilitate the realisation of inclusive education in South African schools. This is because both the private and public sectors share a common goal of a) achieving universal sustainable goals through education; b) improving the quality of education across the board (IFC, 2010, World Bank, 2020a); and, c) as Vally (2020) points out, improving access to education. Therefore, the emancipatory criterion of the Critical Theory is emphasised because the right to education essentially ensures the promotion of learners' freedoms. Therefore, the societal order can be reimagined with greater developments in the future.

Therefore, the *Education Sector Strategy* (World Bank, 1999) notes:

> Paramount among the many reasons why education is important is that it contributes to improving peoples' lives and reducing poverty. It does so through multiple pathways, including … helping people to become more productive and earn more (because education is an investment, strengthening their skills and abilities — their human capital) p. 5.

The *WBES 2020* (World Bank, 2011) notes: “the new strategy looks beyond enrolment and years of schooling completed to whether school-leavers will be able to find a job and earn a living” (p. 44).

In linking the World Banks’ emphasis on emancipation and affirming the evaluative analysis of the World Bank’s neoliberal inclusive policy, the societal structural inequalities in South Africa will see a change as the growing population’s full freedoms to access education through various channels i.e., educational programmes and donor funding to change the prevailing status quo of poverty, will be realised. In other words, they are given more agency. The relationship between poverty and unemployment as the two most pressing factors hindering South Africa’s economic growth underpin the World Bank’s policies and investment project mandates. A positive trajectory between these two factors has the potential to redress past societal inequalities assisting learners to explore many avenues through their education which can assist society at large; e.g., more graduates with technical skills to improve our food security. This confirms the value of the World Bank’s inclusive policy emphasising skills development and illustrates how education can transcend the idea of individual prosperity and bring about community, national and global prosperity. Invariably, a mentally liberated society can devise better solutions to injustices with the higher consciousness and reasoning that education would have produced. Therefore, as Apple (2005) asserted and the *Education Sector Policy Paper* (World Bank, 1999) proposed as a goal, resources invested in liberating society will not go to waste.

Correspondingly, the World Bank’s neoliberal policy is intended to emancipate learners from the exclusion in schools as it arms learners with tradeable skills. In effect, in competitive environments, having undergone an education that maximises their access, participation and opportunities, learners are liberated and are free to trade these skills in the labour market. This is indicative of a glimpse of the promise that quality education will help us to thrive in a global economy. This speaks to equity being attained accompanied by an increase in social mobility. Therefore, macroscopically, inclusive education is not entirely a deferred dream for learners from poor socioeconomic backgrounds. It contributes to fostering their full freedoms and raises their consciousness as Maistry and Africa (2020) inferred, and, in fact, is within reach. The emancipation feature as a key feature of the inclusive education philosophy also

affirms that learners from all diversities can be empowered citizens and can be part of a world order with limitless access, opportunities and participation.

5.4.2 Areas of disagreement

The exclusions of neoliberalism and review of literature in Chapters 2 and 3, from a Critical Theory perspective, all indicate that realising an effective inclusive education system means more than simply emancipating learners but also attending to issues that practically transform society. The IFC's educational projects aimed at building economic growth and human capital and sections of policy documents that are forward-looking, demand greater consideration of socioeconomic contexts. As echoed by Mathebula and Banda (2021), the neoliberal agenda was imposed on the countries of the Global South. Accordingly, in their adoption of the neoliberal agenda, the intention of equalising the global village as these policy documents reveal is only one step forward while taking two back – as in the case of privatisation that excludes some learners to ease the burden of the state. To reiterate, as Maistry and Africa (2020) vehemently argue, this route is not a panacea that ameliorates existing problems. Indisputably, laws mandating education for all need to be implemented more effectively. However, the neoliberal agenda does not level the playing field. In essence, this reveals a negative relationship between thought (in propelling access, opportunities and participation) and praxis (meaningful implementation).

Identifying gaps to be closed that are not met by equally redistributing resources to ensure that everyone is a winner feeds into hegemonic unequal power dynamics. This is evidenced with the elite always being a step ahead with very few constraints faced compared to the myriad faced by those from poor socioeconomic groups. Neoliberal governance will always ensure that the funder benefits the most. Therefore, the dramatic improvement needed in the state's efficiency in delivering quality public services as espoused by Manuel (2003) cannot be realised as the state comes across as being lax in its duties under policies disguised as being pro-poor. As Gupta (2018) comments, the World Bank sells its aid. Thus, the social justice and democracy espoused by the Critical Theory and equality espoused by the values of inclusive education are not taken into account by the World Bank's neoliberal education agenda.

In linking these areas of rejection that do not support equalising power dynamics (critique), transformation and social change, the evaluative analysis can be said to

have shown the exacerbation in societal structural inequalities in post-apartheid South Africa. Justification of this theoretical analysis lies in the stratifications that neoliberal public policies create with solutions that bring no benefit to the economically disadvantaged majority. Contrary to their intentions, learners are denied equitable access to education. Thus, the power and interests of global elites as Dutta (2020) and Mangla (2018) imply, do not inspire transformation in society based on the governance requirements imposed on people.

The role assumed by the World Bank is that of a mediator in the educational initiatives such as the projects it embarks on which are intended to change the status quo and identify practical solutions to ameliorate it. However, as the Washington Consensus has shown, such financial institutions act as dictators of what progress should look like and, in that process, implement socially unjust educational governance. Regrettably, the negative consequences of this ongoing struggle are experienced most by the poor people in society. In effect, as Rossow and George (2014) suggest, the interests of citizens with regard to equality are neglected in appeasing the World Bank as the implementation of their policies and educational strategies are used as the yardstick. The rise in competition between businesses means a greater demand for individuals possessing high-level skills and knowledge. Therefore, there is no opposition to the hierarchy that sorts people into winners and losers. Opportunities and participation for some people are thus limited.

It is all very well to increase access that creates the general impression people may be educated but, in terms of quality, they do not possess the right skills for meaningful employment. Consequently, not being competent to contribute to the economy means that individuals are delegated to the lower socioeconomic echelons of society. Hence, equality is rearticulated as something to be earned rather than rightfully deserved. The World Bank's neoliberal agenda is strengthened by state failure to resist the demands of the agenda and to uphold their responsibilities to foster equal power dynamics and the success of its citizens through practical steps in providing a quality social good. Critical Theory reminds us that privileges can be afforded to everyone.

Given the reasons affirming the World Bank's neoliberal agenda for inclusive education, these areas of disagreement confirm the reproduction of societal structural inequalities. However, the World Bank has the global influence and power to mitigate

these inequalities by focusing their attention on democratic values that the theory espouses, namely, establishing fair distribution of opportunities in society.

Inevitably, the societal structural inequalities spill down to *exclusion in schools* – sites that are meant to provide agency and transform the social order. The World Bank's neoliberal inclusive policy falls short of the critique aspect of the Critical Theory in fostering inclusive education in schools as it counteracts global agreements, such as the Jomtien Declaration of Education for All, that demand the implementation of inclusive education, and local policies such as the EWP6 (DoE, 2001). These are specifically aimed at redressing social mobility. Public schools, both rural and urban, are characterised by the EWP6 as full-service schools using twenty-first century learning methods, increasing learners' participation in learning despite their poor socioeconomic backgrounds and providing opportunities to succeed, without placing emphasis on competition between schools.

The World Bank's neoliberal inclusive policy falls short of the transformation aspect of the Critical Theory in building inclusive education in schools. This is shown in the lack of concerted practical efforts to improve the quality of education in public schools. Concerted efforts ought to be centred on building knowledge that develops learners in schools into conscientised beings who can make meaningful contributions to society. Furthermore, the World Bank's neoliberal inclusive education policy falls short of inspiring the social change aspect of the Critical Theory in fostering inclusive education in schools. Education needs to be supplied as a social good that provides meaningful support for learners' future employment prospects and provides them with tradeable skills for participation in a globalised economy. As revealed in the literature in chapter 3, the development of cultural capital such as bilingualism, offers great value and is reflective of schools that maximise inclusive values beyond mere access and completion of the basic requirements of education. In the same vein, schools that do not develop such skills in their learners to give them a competitive edge do not provide evidence of the incorporation of inclusive values. Thus, social mobility is available to learners from privileged backgrounds but is denied for others. Herein we can see that neoliberalism and the purposes of schools form a disjuncture in that neoliberalism advocates for individual attainment of success through competitiveness while schools should encompass values for unity with everyone succeeding. Essentially, Critical Theory urges a collectivist, democratic approach in the fight for everyone to have

agency instead of being couched in marketisation terms, as Rizvi (2016) asserts. Therefore, a neoliberal agenda in education hinders the full realisation of social change which should be enhanced by inclusive schools that provide opportunities and success to all.

5.5 CENTRAL ARGUMENT, DEFENCE AND JUSTIFICATION: THE WORLD BANK HOSTS INCREASING GLOBAL UNEVENNESS, INEQUALITIES IN SOCIETY AND EXCLUSION IN SOUTH AFRICAN SCHOOLS

The increasing global unevenness, inequalities in society and exclusion of learners in schools indicate that the World Bank's neoliberal education agenda does not foster inclusive education in South African schools. Therefore, an urgent reassessment of the neoliberal agenda is required so that it places democratic and socially just values at the centre. Alternatively, its influence should be diminished in South African schools by prioritising the agenda of inclusive education.

The problem with the World Bank's neoliberal agenda has been shown in the literature review to offer little help in changing the education system in post-apartheid South Africa. Granted, as Klees (2020) alludes, the state has ignored some of the basic problems that contribute to the inferiority of public schooling; however, the relevance of the World Bank's neoliberal agenda as the subject of this report is questionable. The solutions their projects promise do not hold water as they do not cater for the greater majority or present a reasonable solution to the problem of low-quality education. The World Bank school projects have been shown to be exclusionary in different ways. What they lack is an approach that is directed towards an equitable distribution of funding for the excluded, speaks to changing the social order i.e., restoring full freedoms and provides strategies for the practical steps that must be taken to solve the problem of exclusion.

The evaluative analysis revealed a disengagement between the World Bank's inclusive policy and the lived realities of learners in post-apartheid South African schools. This analysis showed that neoliberalism leads to a deterioration in the education system with no accountability for infringing the rights of learners to an equitable education. As O'Connor and Fernandez (2006) postulate, the structures of neoliberal governance determine the extent to which the poor will attain competitive outcomes in their education. I also argue that it is of no value if the World Bank works

in isolation from relevant national organizations focussed on issues of inclusive education. The World Bank through partnerships needs to gain a greater understanding of the broader local issues that they are attempting to address. Furthermore, the theoretical analysis of the World Bank's education agenda shows that it has not led to the achievement of the envisioned values of access, opportunity and participation for all. This should be of great concern to society and the state since learners need to be accorded their full educational rights in terms of the Bill of Rights in the Constitution (RSA, 1996).

Essentially, as a key neoliberal proponent in this study, the World Bank in South Africa works against dismantling the hegemony that has created hierarchies in society and South African schools through its neoliberal agenda. Therefore, the Global South stakeholders should aim to diminish the impacts of this unjust agenda by cutting ties with the World Bank as its inclusive policy and projects do not align nor assist to propel their educational rights. As a less extreme solution, the World Bank needs to look towards launching contextually appropriate projects and policies with the end goals of social justice and democratic participation. This will solve the research problem posed in this study.

5.6 CONCLUSION

In this chapter, I reintroduced the key criteria of the Critical Theory framework which was used as a lens to assess the World Bank's neoliberal inclusive education policy. I evaluated the policy documents using each tenet of Critical Theory to establish the extent to which they should be accepted or disregarded. The analysis shows satisfactory compliance with the emancipation tenet but a shortfall in the remaining tenets of transformation, social change and critique. The theoretical analysis informed by the previous chapters of this study shows my stance of why I think the World Bank's neoliberal education agenda is exclusionary in post-apartheid South African schools. To a limited degree, the neoliberal agenda assists in building inclusive schools but mainly leads to exclusion and stratification. Therefore, it is incongruent with the criteria espoused by the Critical Theory in attaining not only inclusive education in schools but democracy and social justice. The next chapter provides the practical strategies to be applied in ensuring neoliberalism does not impede the realisation of the full implementation of inclusive education.

CHAPTER 6: THE WORLD BANK'S NEOLIBERAL EDUCATION AGENDA IN SOUTH AFRICAN SCHOOLS: WHERE TO FROM HERE?

6.1 INTRODUCTION

> Post-apartheid South Africa, national legislation, education policy, and curriculum development make provision for education as a basic human right. But, in a different guise, the right to education lends impetus to the social market ideology, governance, and policies in schools (Mathebula, 2018, p. 12).

Mathebula's assertion supports the arguments that have been echoed throughout this study of neoliberalism, reconfiguring the meaning of education of the highest quality as a social good that should be equitably accessible to all. In Chapter 5, the researcher has shown that the features of inclusion in education are not adequately actualised in the policy documents of the World Bank. The critical review highlighted that inclusion and neoliberalism are not compatible. Therefore, the researcher posited that the ongoing struggle of equality is predominant in educational discourse. The aim of this chapter is to offer various strategies that move us from where we are to where we ought to be in post-apartheid South African schools.

This chapter is divided into three sections. Section 1 offers context in discussing the tension between the World Bank's inclusive education policy and practice and its implications for South African schools. The key message is that there is an ongoing struggle between policy ideals and achievement leading to exclusion in schools. Section 2 presents possible strategies of getting from where we are to where we ought to be in the implementation of an inclusive education. The key message is that inclusive education must be maximised by looking into tenets of the Critical Theory in solving the social and research problem. Section 3 looks into the future of the World Bank's neoliberal inclusive education agenda in post-apartheid South African schools. The key message is that the World Bank's neoliberal agenda should be rejected as it currently stands; alternatively, the World Bank should change its agenda by incorporating socially just and democratic values in fostering inclusive education in South African schools. The contribution made by this chapter addresses the issues raised in the problem statement and the central argument of the study in directing us to a future free from global unevenness, structural inequalities and exclusion of learners in South African schools.

6.2 CONTEXT IN THE TENSION BETWEEN THE WORLD BANK'S INCLUSIVE EDUCATION POLICY AND PRACTICE AND SOUTH AFRICAN SCHOOLS

The central aim of this research was to critically review the impact of World Bank's neoliberal education agenda on inclusive education in post-apartheid South African schools. The problems identified in Chapter 2 of what we can expect from schools operating in a neoliberal climate, the critical appraisal of the literature in Chapter 3 and the theoretical analysis in Chapter 5, all show a common picture that the World Bank's idealistic neoliberal education agenda paints a largely negative picture of exclusion in post-apartheid South African schools. These are the ripple effects of neoliberalism that affect the global village and exacerbate societal structural inequalities. In addressing the problem in this chapter, I address how the dimensions of neoliberalism have led to exclusion in education.

My central argument is that education is a universal right not up for sale or commodification. To elaborate, as per chapter 5, the World Bank's neoliberal education agenda sells the illusion that all education systems will be rewarded with limitless access, opportunities and participation if market solutions are placed at the centre. Its neoliberal inclusive policy has good intentions, namely, to build economic growth and human capital through education. Instead, it has shown that it only benefits the financially privileged in developing the desired human capital with adequate competitive skills. Thus, no transformation is seen. The entrepreneurial value of self-interested gains that increase the wealth of entrepreneurs eliminates any prospects of building an inclusive education system. Entrepreneurialism reduces the power of the recipients of public education because public schools, relying on limited state resources, are not able to develop the same skills, knowledge or competence offered by private schools. Therefore, social change is a far-fetched reality. The viewpoint on changing the status quo that my argument offers is to create an inclusive educational system with a uniform structure that allows participation of learners within all school structures and leaves no child behind in their achievement and opportunities that schools can offer in developing learners' competence and competitiveness in society. This stance supports the identification of the problem, recognising the value of emancipation that education offers as a solution to transform the neoliberal agenda that currently defines the educational landscape.

6.3 IMPLEMENTATION OF AN INCLUSIVE EDUCATION: POSSIBLE STRATEGIES OF GETTING FROM WHERE WE ARE TO WHERE WE OUGHT TO BE

It remains imperative that we acknowledge that the right to inclusive education is an ongoing struggle. However, not all hope of neutralising the existing tension between policy and achievement should be lost (Pitkin, 1967). As Christie (2010) espouses, it is a struggle that can be fought and won. The aim of this report has been to provide a critical review of the World Bank's neoliberal education agenda. In response to the central argument, literature review and critical review, the following are suggested as strategies to address the social problems brought about by the World Banks' neoliberal education agenda.

A practical strategy to transform the status quo that is the global unevenness experienced by South Africa as a Global South country under the World Bank's hegemony would be an urgent reassessment of its education agenda. This specifically means a rethinking of their objectives and not working in isolation but in close collaboration with international organisations such as UNESCO[5] and GlobalEd[6] that confine themselves to propelling inclusive values in education. In the same vein, with key players working in collaboration, it allows for more freedoms to be attained and ultimately evens out the playing field as far as Global North, East and South countries are concerned. Furthermore, greater consciousness invariably invites change and, in that regard, implementing contextually aligned projects and inclusive policies as a strategy to attain social change would ease the current tension between the idealisation and achievement of inclusive education through an agenda informed by socially just and democratic values.

In responding to the existing societal inequalities in South Africa, similarly to global unevenness, a strategy informed by transformation with practical steps ought to be implemented that sees members of the World Bank frequently attending and engaging in local forums, business and education indabas. In this way, collective innovative ideas can be shared between private businesses financed by the IFC and the public

[5] The United Nations Educational, Scientific and Cultural Organization is aimed at improving issues related to education, science and preservation of culture globally.
[6] Global Education events is an NPO established with the purpose of exchanging ideas to improve the educational space for all stakeholders involved.

sector and partnerships could be formed to even-handedly distribute the resources required for a quality inclusive education. In this way, societal inequalities would be mitigated and more people would have the opportunity to acquire the relevant skills required in the job market.

A practical strategy to enable social change in South African schools would be for the already existing independent schools financed by the IFC to be used as support hubs for public schools in areas of learning and teaching that they lack. In this way, inequality and the on-going struggle for equal and inclusive education would be diminished as opportunities that could sharpen learners' competitive edge would be availed. As an added layer to fulfilling the critique tenet, however, not specifically directed at the World Bank, is that the South African public sector needs to be intentional in achieving its national imperatives and adopting the feasible positive strategies from the World Bank outlined in the theoretical analysis under areas of agreement such as being more skills-oriented in their education model.

6.4 THE FUTURE OF THE WORLD BANK'S NEOLIBERAL INCLUSIVE EDUCATION AGENDA IN POST-APARTHEID SOUTH AFRICAN SCHOOLS

The future envisaged by the Critical Theory is one that has socially just and democratic values at the centre. In this research report, it has been clear that Critical Theory and inclusive education both favour these democratic values in cultivating inclusive schools in post-apartheid South Africa.

In that regard, the critical review presented in this report shows that schools are the vehicle that dictates what the future will look like across the global, national and societal levels. An urgent reassessment of the World bank agenda, equitable distribution and accountability from the World Bank and the implementation of the suggested strategies present a lifeline for their continued presence in post-apartheid South African education. The arguments made in this study have been consistent in asserting that all the features of inclusive education i.e., access, opportunities and participation be equally enacted across policy documents or investment projects. International relations with organisations such as the World Bank are fruitful to a limited degree. However, without inclusion being paramount in their strategies, the World Bank's neoliberal agenda should be replaced in South Africa as this agenda will

continuously create stratification that does not benefit the public education system, citizens in society or learners in schools.

6.5 CONCLUSION

This chapter provided relevant strategies for solving the problems of global unevenness, societal structural inequalities and exclusion of learners in schools. The strategies were informed by the tenets of the Critical Theory which the agenda has not successfully managed to actualise, namely, critique, transformation and social change, in bringing about the envisioned maximised inclusive education in post-apartheid South Africa. The World Bank's education agenda in South Africa has been given the benefit-of-the-doubt providing that the suggested strategies are implemented as a matter of urgency. However, if its presence is of no assistance to stakeholders in education, the agenda should be rejected in post-apartheid schools.

CHAPTER 7: CONCLUSION

In post-apartheid South African schools, the World Bank's neoliberal education agenda that characterises its educational projects and inclusive policy reveals a disengagement between inclusive education tenets and neoliberal practices. The problems that have been motivated this research has been the World Bank's neoliberal education agenda causing an increase in the global unevenness, societal structural inequalities and exclusion of learners in schools. The central argument has thus been that their influence in South Africans be rejected as they do not foster the values of an inclusive education. In solving this argument and looking towards the future, I propose that they revise their neoliberal education agenda so as to include values of social justice and democracy in fostering inclusive education.

The envisioned inclusive educational agenda that enables the creation of inclusive schools globally is rooted in having an even playing field. The key features of access, opportunity and participation are rooted in the principles of equity and equality. This means that inclusive education arms learners with the right tools to achieve their highest potential and prepares them to confidently thrive under global competitiveness after they have completed their schooling. However, neoliberalism has its own distinct features which limit the maximisation of the key features of access, opportunities and participation. Thus, a utopian inclusive education vision remains an ideal rather than a reality.

Through its projects on a global level in countries of the Global East and at the local level in the Global South, the World Bank's neoliberal education agenda reveals that it does not consistently foster the values of inclusive education. These projects are thus contextually inappropriate to these regions and it is not possible to achieve the greater goal of global evenness, societal structural equality and inclusion of learners in schools.

This report found that the values of the Critical Theory theoretical framework and inclusive education are congruent in striving for the same goals: equality, social justice and democracy. Based on the critical review of the World Bank's inclusive policy in post-apartheid South Africa, the policy subscribes to the emancipation of learners but falls short in not addressing the unequal power dynamics in society (critique) or taking practical steps to improve the state of public schools in accordance to those in the

private sector (transformation). The agenda thus exacerbates the ongoing struggle of global unevenness, societal structural inequalities and exclusion of learners in schools (social change). In essence, the picture that emerged positions the World Bank's education agenda as one not driven by motives of fairly distributing the social benefits of education. Therefore, learners from privileged schools and backgrounds are the only ones who reap the benefits of their inclusive educational agenda while the plight of those with poor socioeconomic circumstances having to attend under-resourced public schools deteriorates.

The contributing argument I have made throughout this report is that the increasing global unevenness, inequalities in society and exclusion of learners in schools indicate that the World Bank's neoliberal education agenda does not foster inclusive education in South African schools. Therefore, a realignment of the neoliberal agenda with democratic and socially just values is urgently required. This argument is significant to solving the aforementioned social problems as it provides the benefit of the doubt to the World Bank. It suggests that that if the World Bank were to employ strategies such as collaborating with national stakeholders in carefully revising its agenda to be contextually suited, the continued presence of the World bank would be accepted. Their IFC should be assisting with the redistribution of resources between private and public schools such as the strategy of using private schools as supporting hubs for those in the public sector that lacking resources in certain areas.

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