SARE

Southern African Review of Education

A Review of Comparative Education, History of Education and Educational Development

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Contents

Editorial notes

Given the history of South Africa, particularly in the 20th century, policies after 1994 sought to address embedded apartheid inequalities and inequities that were grounded not simply in the social lives of people but also within the very concepts that framed their respective beings and their access points to the social realms in which they lived.

On one hand, this positioned South African citizens to grapple with sets of possibilities and challenges in very particular ways. For the majority, it was about eradicating or reducing the suffering and abjection that they had previously been subjected to. On the other hand, the majority of South Africans had to quickly come to terms with a version of social change that overwhelmed envisioned altered materialities with the material and emotional machinations and needs of wider social conditionalities and older dominant actors.

A key dilemma was whether communities could meaningfully change their material realities in ways that didn't fundamentally undermine, transform or compromise the material and emotional configuration of physical place. (Berlant 2011). A further dilemma was whether 'the suffering of the poor and previously disenfranchised,' as a binding construct would not, unavoidably, have to dissolve and evaporate in the face of 'greater national social good' needs. More potently, a key concern was what would happen when binding constructs of change lost their appeal (or were stripped thereof). What would ensue when the nature of suffering became (or was made to become) just ordinary, dull and mucky rather than disastrous, catastrophic or overwhelmingly tragic? When despair and impoverishment is experienced as quiet, abject, predictable, dispersed and boring, would terminal suffering not be its inevitably naturalised and communally acceptable consequence?

South Africa in 2018 remains a country in noticeable distress. How do we begin to grapple with the reality that conditions have not noticeably changed for the majority of the population, 24 years post-apartheid, notwithstanding key gains that have been made? The seven articles that make up this edition gnaw at some of the fault lines that contribute to the current status quo. They grapple with how elements of systemic imperatives, and the needs of a regulatory state, penetrate the symbolic and conceptual reproduction of new lifeworlds. These include concerns with the concept of race in South Africa, which became trapped within new policy ideas after 1994 in ways that have tended to extend the consequences that the struggles against racism sought to erase, with conceptualisations of agency within the entanglement of knowledge production processes and understandings of apartheid and colonialism, and the need to confront and insert issues of affect, pain and emotion into current debates on change – especially with regard to curriculum innovation in educational institutions. Three of the articles directly address core ideas attached to the above concerns, while four articles provide different ways of extending their resultant gaze.

The edition is ordered in ways that work with the analytical categories of health (disease), race and

history, and tease out different elements attached to how these help readers think about current challenges – both in society and within schools.

The edition contains three articles that focus on the analytical frame of health (disease) and its 'naturalisation.' While the approaches of these three articles are fundamentally different, the common thread is HIV-AIDS and its contribution to decolonisation debates and curriculum innovation, how it is systemically taught as part of sexuality education and health within the school subject of life orientation in South Africa, and how teachers are prepared, trained and assisted to implement HIV-AIDS curricula in specific school situations. The articles show how debates around health (HIV-AIDS) often tend to avoid elements of affect, pain and emotion in favour of superficial and functional renditions and implementations of designated health (HIV-AIDS) curricula. Such approaches undermine curriculum innovation in educational institutions, and help explain how despair and impoverishment within vulnerable communities become experienced as quiet, abject, predictable, dispersed and boring realities. The edition also contains two articles on the coloniality of knowledge production processes in South Africa, and links to history.

Crain Soudien opens the edition with the provocative assertion that HIV-AIDS discussions in South Africa bring into clearer perspective the question of affect and emotion, and that the greater foregrounding of 'black pain' contributes in crucial ways to non-reductive understandings of how everyday pain is experienced.

Salim Vally and Enver Motala continue with an equally challenging caution about the cavalier ways, reminiscent of apartheid 'science,' in which the concept of race has continued to be used in political, social and educational studies in contemporary South Africa to 'explain' a variety of socioeconomic and political issues. They warn about how racist vocabularies, metaphors, descriptions and stereotypes, that were employed by the apartheid state and its ideologues to promote racist thinking, could be deepened and further naturalised if the current trend is not problematised and counteracted. Vally and Motala assert that current everyday usage of race terminologies tend to justify and entrench the ideologies and power of racist systems.

The narrative then turns to articles on sexuality education in life orientation in South African schools, and teacher views on the support provided to them to understand and implement the HIV-AIDS curricula in specific school situation. Gavin George, Leigh Adams Tucker, Saadhna Panday-Soobrayan and Faith Khumalo focus on the life orientation (LO) learning area within schools, and question the extent to which sexuality education, including reproductive health, is aligned to the National Strategic Plan for HIV, STIs and TB 2012–2016 in South Africa. They suggest that understandings of key issues at the individual, interpersonal, school, district and community levels have led to issues of everyday health within the LO curriculum not being optimally implemented or delivered. Starlin Musingarabwi and Sylvan Blignaut provide a complementary discussion of how teachers in Zimbabwe understand, implement and experience the implementation of HIV-AIDS curricula in specific school situations. They explore how teachers in multiple settings in Zimbabwe are facilitated and assisted to teach materials within HIV-AIDS curricula.

Linda Chisholm, Michelle Friedman and Queenta Anyele Sindoh, in their article, provide the edition's third provocation – namely, how to critically engage with the coloniality of knowledge production processes in South Africa. Their interest is to show how the teaching, from different perspectives, of interpretive traditions has been established over time in South African history, and how this entrenches particular kinds of narratives. Drawing on the insights of lecturers of history of education, and an analysis of curricula via textbooks, Chisholm and colleagues reveal how continuities in power relations, and representations between past and present, and between colonial and post-colonial periods, are evident within both curricula and the teaching thereof, and how this reproduces a Eurocentric orthodoxy that provides a sanitised and unproblematised understanding of the past within public schooling.

This is followed by a contribution from M Noor Davids, who shows similar forms of 'forgetting' and 'essentialisation' in relation to physical space and geographical location. He argues that the essentialisation of texts and practices of memory and history within the public imagination militates against the decolonisation of any postapartheid historical narrative. Using the geographical area (and popular representation) of District Six in Cape Town as his case study, Davids demonstrates how dominant colonial discourses were constructed and reproduced within the popular imagination, and offers an alternative reading, which he deems more culturally significant for the postapartheid experience. His goal is to interrupt dominant knowledge production processes and the ways in which these shape both the regulatory gaze of the state and the mundane everyday imagination of the marginalised majority.

The edition concludes with an article by Paul Munje and Rouaan Maarman, which underscores the need to pay closer attention to how individuals and institutions foster capabilities, freedoms and techniques that allow them to grapple with different conditions and inequities. Using the quest for quality education as its main analytical lens, the article explores the factors that determine what individual schools can or cannot do with their available resources in this quest. Munje and Maarman use the capability approach framework to delineate alternative conceptualisations of quality education that more earnestly addresses issues of race, class and social justice in South Africa.

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HIV-AIDS, decolonisation and the South African curriculum: Explorations on the edges of curriculum learning

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Abstract

This contribution reflects on the value of the HIV-AIDS discussion on the decolonisation debate in higher education. It looks at how a critical engagement with the insights generated in the HIV-AIDS curriculum discussion can enhance the decolonisation project, using a four-step progression through the issues. The article begins with a brief discussion of the curriculum and its purposes. It then engages with the discussion on decolonisation and the curriculum. Next, it considers some of the most important learnings that have been gained from the HIV-AIDS curriculum discussion. A final step considers what new insights for the decolonisation and broader curriculum innovation process the discussion on HIV-AIDS offers. The contribution argues that while there are many commonalities and convergences between the HIV-AIDS and decolonisation discussions, the HIV-AIDS discussion brings into much clearer perspective the question of affect and emotion. The argument is made that the decolonisation discussion has usefully brought to the fore the question of black pain, but that it has not conceptually been able to explain what black pain is. The HIV-AIDS discussion, it is suggested, contributes to an understanding of how pain is experienced in non-reductive ways.

Keywords: HIV-AIDS, decolonisation, curriculum, South African education

Introduction

Lesley Wood, Vasu Reddy and I edited a special issue of the *South African Journal of Higher Education* (SAJHE) that focused on the ways in which HIV-AIDS has been taken into the South African higher education curriculum (Wood, Soudien & Reddy 2016). Conscious of the student protests taking place around the country with their focus on decolonisation, we emphasised that our intervention was not about decolonisation. It was, rather, about many of the issues that were raised in the decolonisation discussion, namely, exclusion, marginalisation, misrecognition, delegitimation, othering, the denial of dignity, conceits of superiority, by-standing, apathy, racism, sexism and all the other ways in which power, both structural and ideological, expressed itself. It was not about decolonisation itself but about how the phenomenon of HIV and AIDS, and the forms of power that were given and taken, was imposed and surrendered through the experience of the disease. Critically, it was about how this experience was worked with in the higher education curriculum. The SAJHE special issue was an opportunity to show how the challenge of curriculum reform and renewal in South Africa could be taken further through a focus on issues of HIV and AIDS.

This article uses insights from that edition, and other scholarship on the disease in the decolonisation discussion, to highlight how a critical engagement with insights generated in the HIV-AIDS curriculum discussion can enhance the decolonisation project. It does so by using a four-step progression through the issues. It begins with a brief discussion of the curriculum and its purposes. It then engages with the discussion on decolonisation and the curriculum. In a third step, the article considers some of the most important learnings that have been gained from the HIV-AIDS curriculum discussion. A final step considers what new insights the discussion on HIV-AIDS offers the decolonisation and broader curriculum innovation process. The discussion is held together by an initial engagement with the curriculum, where I lay down some key concepts that could be useful for rethinking the broader curriculum development discussion. I posit that central amongst these concepts is the question of agency.

An approach to the idea of the curriculum

What is meant by *curriculum* is critical for a discussion on difficult questions such as HIV and AIDS and decolonisation because the term is used widely and freely to take in and absorb a multiplicity of different meanings. It is critical also because of the role the curriculum can play in helping human beings to relate, as Paulo Freire (1973: 3) explained,

> to their world in a critical way. They apprehend the objective data of their reality … through critical reflection – not by reflex, as do animals. And in the act of critical perception, men discover their own temporality. Transcending a single dimension, they reach back to yesterday, recognize today, and come upon tomorrow.

Freire argued that the traditional curriculum was disconnected from life, that it was 'centred on words emptied of the reality they are meant to represent' and, because it lacked 'concrete activity,

could never develop a critical consciousness' (Freire 1973: 37). The approach I take here is to pose the question of how the curriculum can, to use Freire's phrase, connect with the lives that people are living and put them in a position where they can work with the physical and psychological substance of their beings in states of self and social consciousness.

Globally, popular discussions of the curriculum have been dominated by the understanding that the curriculum is *the syllabus.* What is in the syllabus for a particular subject is, essentially, what constitutes the curriculum. It is characterised by a description of the subject contents, indexed, principally, by subject headings (see Smith 2000: 4). This interpretation has contributed to a focus on content. Curriculum, in this explanation, is the body of knowledge that is transmitted or delivered to learners.

More sophisticated discussions of curriculum have sought to locate the content focus in a stronger educational frame. These approaches were prompted by the point that there was, surely, more to education than simply what was in the syllabus. It was this provocation that led to the restating of the idea of the curriculum as a 'programme of activities [by teachers and pupils] designed so that pupils will attain as far as possible certain educational and other schooling ends or objectives' (Grundy 1987: 11). This understanding has now come to be the preeminent one in the educational community. The history of its development has at its heart, the figures of Bobbitt (1918) and Tyler (1949). Bobbitt (1918: 42) said:

> Education that prepares for life is one that prepares definitely and adequately for [the performance of specific activities]. However numerous and diverse [these activities] may be for any social class, they can be discovered. This requires only that one go out into the world of affairs and discover the particulars of which these affairs consist. These will show the abilities, attitudes, habits, appreciations, and forms of knowledge that men need. ... The curriculum will then be that series of experiences which children and youth must have by way of attaining those objectives.

Tyler (1949: 1) developed Bobbitt's fundamental approach and made the point that the curriculum was based on four questions:

1. What educational purposes should the school seek to attain?
2. What educational experiences can be provided that are likely to attain these purposes?
3. How can these educational experiences be effectively organised?
4. How can we determine whether these purposes are being attained?

Underpinning the Bobbitt and Tyler approach, was the basic presupposition that the curriculum was a programmatic device. As a programme, it systematised and organised bodies of content to achieve certain objectives. These objectives, as educational imperatives, were fundamentally about behaviour. This understanding, despite, as we shall see, the criticism it has evoked, is essentially that which has come to prevail in most educational systems around the world. Known as the *product* model, it has provided the educational community, almost everywhere, with the concepts and technologies for the development of the curriculum. The model is based on Fordist managerial principles, characterised by clear specification of the elements required for its delivery, namely, inputs (objectives) and outputs (attainment) that can be identified and measured and

assessed.

As can be anticipated, the product model was criticised for its instrumentality. Two important critics, Stenhouse (1975) and Cornbleth (1990), pointed out that it depended too much on a decontextualised, industrial conception of production. To this approach, they sought to bring the participants in the experience, that is, teachers and learners, into play. The curriculum, in this view, was not simply a document to be implemented. It was, rather, about what actually happens in the classroom; teachers brought into this classroom engagement their habits, ideas and intentions. What emerged, explained Stenhouse (1975: 4-5), was that 'curriculum is an attempt to communicate the essential principles and features of an educational proposal in such a form that it is open to critical scrutiny and capable of effective translation into practice.' Most significant about Stenhouse's intervention was that it recognised teachers as active agents in the curriculum process. From this, the understanding of curriculum as *process* rather than product emerged.

Cornbleth (1990), while working with this approach, argued that it did not sufficiently make clear the specificity of the context in which the process of the curriculum was playing itself out. She argued that the curriculum was contextually shaped. This context included the nature of the student-teacher relationship, the organisation of classes and, critically, the hidden curriculum. This hidden curriculum, especially its focus on the unarticulated and unexplained ways in which students learn through the organisation of time, space and form, Cornbleth (1990: 7) said, had serious social consequences for understanding the curriculum as a medium through which to read the experience of inclusion and exclusion. It took its impetus from the deeply influential work of Michael Apple, particularly his *Ideology and Curriculum* (Apple 1979). In *Ideology and Curriculum,* Apple critiqued the behaviourism of the dominant Tylerian approach to the curriculum which, he said, suggested that education could be understood through scientific procedures. Cornbleth and Apple argued that the curriculum sought to induce docility in students. It constructed them as homogenised subjects and assumed that they all came into the learning process in the same undifferentiated and homogenously positioned ways. In taking this view, Apple was influenced by Foucauldian notions of governmentality and the ways in which the curriculum as text normatively framed subjectivity.

As the deeply important work of William Pinar, William Reynolds, Patrick Slattery and Peter Taubman (2008), first published in 1995, shows, the vein of thought inaugurated by the Stenhouse intervention and overlain with that of Apple, spawned what one might describe as the constructivist approach to the curriculum. Central to this approach was the idea of curriculum as a site for the mobilisation, deployment and distribution of power. It was constructed by social beings. Pinar and his colleagues stressed that the distinctive value of this approach to the curriculum was its hermeneutic emphasis. They argued that its focus was not the practical one offered by Tyler of how a curriculum should be put together but, critically, about how it should be understood as a space in which meaning was made. The value of this approach was that it presented the curriculum as a terrain of engagement in which multiple forces and influences were at work. Central in the dynamic of these forces were human beings operating, following Pinar and

his colleagues, as interpreters. Using the idea of engagement and the central act of interpretation, the factor of agency was significant.

In bringing this section to a close, relevant for the discussion about decolonisation, HIV-AIDs and the curriculum, key, I want to suggest – and this is alluded to but not possibly sufficiently developed in Pinar et al. (2008: 5) – is that the curriculum terrain is occupied by agentic people. These agents bring to the curriculum encounter ideas and beliefs that are sometimes in alignment with the stated objectives of the stated curriculum, sometimes not, and, often, in a complex amalgam of acceptance, rejection and even confusion in relation to it. Putting aside those confused, ambivalent states of mind that people regularly bring to the experience, I work here with that situation where people wrestle with the curriculum and take to it critical dispositions and make it a site of living engagement, or a site of critical teaching and learning or what the literature describes as critical pedagogy. Grundy (1987: 105) describes this as a *curriculum of praxis*:

> Critical pedagogy goes beyond situating the learning experience within the experience of the learner: it is a process which takes the experiences of both the learner and the teacher and, through dialogue and negotiation, recognizes them both as problematic. ... It allows, indeed encourages students and teachers together to confront the real problems of their existence and relationships. ... When students confront the real problems of their existence they will soon also be faced with their own oppression.

It is this idea of curriculum as praxis that I use in this contribution. Key to it is the idea, as developed by Grundy, of critical pedagogy. This pedagogy 'places control of knowledge … with the learning group rather than elsewhere' (Grundy 1987: 104). In working together, the learning group, as Yek and Penney (2006: 7) say, 'develop an understanding of their respective pedagogical roles and what others expect of them in the learning process.' Important about this approach to the curriculum is that it returns repeatedly to the question of the content and does not shy away from the challenge of what it seeks in terms of learning outcomes. As Grundy (1987: 115) put it 'the curriculum is not simply a set of plans to be implemented, but rather is constituted through an active process in which planning, acting and evaluating are all reciprocally related and integrated into the process.' The key concern is that the participants make sense of the concepts and theories as they are encountered in relation to the real concerns that they bring to the encounter.

Decolonisation and the curriculum

Having laid out the discussion on the curriculum, I now turn to the decolonisation debate on curriculum that is currently underway in the university in South Africa. This discussion has attracted a large number of contributions, both journalistic (see, inter alia, Garuba 2015; Nyathi 2016; Kamanzi 2016; Essop 2016; Hendricks & Liebowitz 2016; Rudin 2017) and scholarly reflections (see Mbembe c. 2016; Pityana 2016; Prah 2017).

In early 2015, students at the University of Cape Town (UCT) began a campaign to remove the statue of Cecil John Rhodes, the major architect of colonialism and capitalism in South Africa, from its imperious vantage point on the slopes of Devil's Peak overlooking the campus. Called the

#RhodesMustFall (#RMF) campaign, it rapidly gathered both momentum and scope. Strategic spaces on the campus were occupied, including, for a period of almost two months, the central administration block. Accompanying the occupations were teach-ins and lectures. Out of this, and in some ways more critically, a powerful ideological movement with quasi-programmatic features quickly developed under the aegis of the #FeesMustFall (#FMF) campaign in the university sector in the country. For much of 2015 and 2016 key universities were subjected to intense strain. Occupations, closures and disruptions became the order of the day.

The modalities, strategies and tactics of the #FMF campaign were dramatic and, in part, effective. These modalities have attracted, like the Occupy movement in the United States, a great deal of interest. Questions have been raised about the role of social media and the deliberate flat leadership structure the #FMF campaign has sought to sustain. Interesting as those questions are, much more important for the purposes of this discussion were the issues raised in the campaign. Central amongst these were those of access to the university, its curriculum and governance. Holding the issues together and giving it a somewhat programmatic gloss was the idea of decolonisation. Decolonisation made available to the student movement the conceptual lenses from which and with which it could think and act. As a slogan, it struck deep chords in the country and resonated loudly in the tumultuous protests that came to dominate the headlines. It gave students and their allies in the universities the discursive and ideological vocabularies to argue against fee increases (access), the presence of security forces (governance) on the campuses and, most pertinently for this discussion, the colonial nature of the curriculum. It is to the last of these that the discussion now turns.

One of the #RMF's most strident demands was that UCT should 'Implement a curriculum which critically centres Africa and the subaltern … through addressing not only content but languages and methodologies of education and learning' (RhodesMust Fall 2015: 6). This demand was picked up around the country and quickly became a popular rallying cry. Much has been written about it since. This writing, as might be expected, is marked by contention. It contains the full spectrum of explanations of what decolonisation is. The most popular understandings, both supportive and critical, include explanations that equate it with the syllabus (see, for example, Tabisher, 2017: 11). It is not, for the purposes of this discussion, these populist explanations that are of interest. It is those that engage with it critically that are important.

More serious explanations include the contributions of scholars such as Garuba (2015), Hendricks and Liebowitz (2016), Kamanzi (2016), Rudin (2017) and Nyathi (2016). While few of these contributions engage the actual curriculum that they critique in the way in which sustained analyses of the university such as the work of Adam (2009) and Adams (c. 2008) have, the major criticism they make of the existing curriculum is its dependence on 'western epistemology, methodology and scholarship. They've railed against the silencing of the "Other" – particularly African scholars. They've objected to what theorist Raewyn Connell calls the rendering of Africa as a "place to learn about and not from"' (Hendricks & Leibowitz 2016: para. 7). All the major scholarly reflections on decolonisation accepted this point of departure and built upon it. Kamanzi

(2016: para. 8) emphasised that important when looking at the dominant curriculum was 'the content to be taught … the methodology of teaching and assessment [and] the hierarchal relations of authority.' Garuba (2015) went further – the central issue for him was 'the object of study' (para. 12). Drawing from the criticism of the curriculum in earlier post-colonial contexts, and notably that of Ngũgĩ wa Thiongó, he said the fundamental questions for the curriculum were those of place, perspective and orientation. Transforming the curriculum was not about adding new items to the existing curriculum, it was about 'recognising and according value to the [knowledge of the] previously disadvantaged' (Garuba 2015: para. 17). This development, he argued, could proceed in two steps. It could begin by adopting what he called a content-driven additive approach, but it needed to move on to understanding 'how the object of study itself is constituted' which could 'lead to a rethinking of the theories and the methods that underlie the framing of the curriculum' (para. 19).

Also useful is the commentary of Essop (2016). While explaining that the idea of decolonisation was not new to the South African higher education landscape, Essop (2016), like Garuba, gestured towards a larger view of what it could be. Taking it towards a praxis understanding, including the role of pedagogy, he contended that decolonisation:

> is about how knowledge – and the assumptions and values that underpin its conception, construction and transmission – is reflected in the university as a social institution. It is in essence about institutional culture: the ways of seeing and doing that permeate a university and are reflected in learning and teaching. In this sense it is both about the formal and the informal or 'hidden' curriculum. ... Decolonisation is first and foremost about inclusion, recognition and affirmation. It seeks to affirm African knowledge and cultural traditions in universities, which remain dominated by western traditions. (paras 5-7)

In these contributions, there is widespread agreement that decolonisation is about centring enquiry and the making of knowledge around the full historical and cosmological experience of Africa. Mbembe (c. 2016: 3), for example, said 'we are … calling for the demythologization of whiteness because democracy in South Africa will either be built on the ruins of those versions of whiteness that produced Rhodes or it will fail.' And so, he explained, 'for these reasons, the emerging consensus is that our institutions must undergo a process of decolonization both of knowledge and of the university as an institution' (Mbembe c. 2016: 10).

But what Africa means, is where the contention is. When inclusion, recognition and affirmation, as Essop has put it, are the priorities, what exactly is meant? Nyathi (2016: para. 5) argued that it was at this point that a kind of 'glossing over' of the issues had happened 'at the expense of real engagement.' He asked:

> What is this thing called Africa or African that people wish to infuse into curricula? Unpacking it makes clear that the notion of 'Africa' is a largely a social construct that's not borne out by the facts. Somalia is different to Zimbabwe. ... And if the continent is just one big happy family as this narrative of an African identity suggests, what is the xenophobia that's played out across South Africa in recent years all about? (Nyathi 2016: paras 7-8)

Two powerful responses to these questions emerged. The first was the black intersectionalist view, which is evident in the intellectual innovations of the #RMF and #FMF movements. The second is what I call, for the moment, the post-human view. It is best represented by scholars such as Prah (2017) and Mbembe (c. 2016). It is in the tension generated by these two approaches that the significance of the South African discussion of decolonisation can be argued to lie.

The approach of the black intersectionalists is based on interpretations of Fanon in his explanations of blackness, and an insistence on the need for black people to take charge of their lives, their ways of interpreting and being in the world on their own terms and in their own way. Gamedze and Gamedze (2015: 1) make the observation that whiteness has caused black people to be alienated. This alienation,

> [seeks to control] where we live, how we live, how we speak, what we say when we do speak, how we think, and perhaps most importantly for us [as intellectuals] what we think, speak and write about. ... As African intellectuals, as Black people, this process of alienation is one we need to tackle, resist and subvert. To be a radical African intellectual is to challenge, on fundamentally personal, institutional and societal levels, this form of alienation that colonial education encourages. (ibid.)

In the course of asserting the centrality of black dignity, black intersectionalists argue that decolonisation is fundamentally about disrupting all forms of *normal* engagement with the agents of normativity, including the dominant knowledge apparatus of the university (Sebambo 2015). Student activist, Leigh-Anne Naidoo, speaking at a national meeting convened by the Minister of Higher Education, Dr Blade Nzimande, made the point that what students wanted was to alienate their own alienation (notes taken by the author at talk given by Leigh-Anne Naidoo, Durban, 16 October 2015). The critical task of decolonisation, she said, was to disrupt the norms of the system: 'you're not in charge of us.' Amplifying this view, a statement by #RMF asserted: 'Our freedom cannot be given to us – we must take it. We want to be clear that our only regret is that we did not take the statue down ourselves. Going forward, we will no longer compromise. Management is our enemy' (Rhodes Must Fall 2015: 12). The movement's objective, the statement said, was to create new spaces on UCT's campus for black bodies, where 'they could breathe.'

A pivotal concept in this analysis was, and indeed remains, that of the 'black body.' Power, it suggested, was distributed through the positioning of bodies – white bodies and black bodies. Elemental in this analysis, giving it a deliberate political edge, was the image of the abject black body. I will argue below that it is precisely at this moment that the significance of the HIV-AIDS discussion presents itself to decolonisation as an opportunity for further reflection. But let us look, first, at how the idea of the black body is approached by the black intersectionalists.

Naidoo (2016: para. 30), reflecting on the actions of #RMF students in covering up a statue of Saartjie Baartman (a Khoi woman carried off to Europe as an object of entertainment in the late 1800s) in UCT's library, made clear the movement's rejection of the objectification and denigration of black bodies: 'Thus we aimed to illustrate that the violent objectification and

sexualisation of the black body is a system, which feeds into the stereotype of racial superiority so subtly and insidiously that it is hard to detect even by those bodies it represents in real life.' Important in the intervention of black intersectionalism, is the juxtaposition of blackness and intersectionality. The essence of the argument is that the experience of alienation is the result of multiple overlapping causes and influences, and is, therefore, intersectional in its making. It is, nonetheless, signified viscerally in the alienation of the black body. Sopazi (2016: para. 2), reacting to the presence of security police on campuses throughout the country said: 'We see how much the black body has been brought to a level of nothingness. Through police brutality, we see whiteness demonize us and creating us as criminals. We are revolting against an unjust society. An anti-black imperialist society that is only geared at oppression of the black race.'

The post-human approach exemplified by the work of Prah (2017) and Mbembe (c. 2016) was, in part, a response to this. They sought to bring to the decolonisation discussion a long historical perspective and to locate it within a larger and older global discussion about the curriculum. Activating their scholarship was a deep anxiety about the insidiousness of modern racism and the complex ways in which it was reinstituted through the nativisation of ideas of race and tribe. Prah (2017: 1), for example, took exception to the racial ways in which the idea of Africa had been taken up:

> The Africanization or localization (as it is sometimes called) of positions which were previously held by colonial personnel does not in itself necessarily translate as outstanding progress. It must be remembered that Africanization wherever it has been pursued on this continent is a policy which mainly affects the fortunes of the elite.

He argued that if development was to take place it had to do so not on the basis of colour but of culture: 'The centering of African culture at the heart of the development endeavour is crucial' (Prah 2017: 2).

Mbembe (c. 2016: 1) made a similar argument. He suggested that dominant interpretations of the idea of Africanisation lacked clarity. Many, he explained, 'want to finally bring white supremacy to its knees. But the same seems to go missing when it comes to publically condemning the extra-judicial executions of fellow Africans on the streets of our cities and in our townships' (ibid.). In analysing the equation of decolonisation with Africanisation, he took the view, also following Fanon, that the project of Africanisation had historically in the African context turned out to be 'the transfer into native hands of those unfair advantages which were a legacy of the colonial past' (Mbembe c. 2016: 11). It was, he said, a 'racketeering' or predatory project, a moment 'when 'the nation is passed over for the race, and the tribe is preferred to the state' (ibid.).

What then, Mbembe (c. 2016: 12) asked, 'is the true meaning of decolonisation? It is the taking back of our humanity. ... They are struggles to repossess, to take back, if necessary by force that which is ours unconditionally and, as such, belongs to us' (c. 2016: 12). He suggested that becoming human does not happen 'in' time but through time, 'and time, properly speaking, is creation and self-creation – the creation of new forms of life' (ibid.). Rejecting the idea that ideas of futurity belonged to the Europeans, he argued that decolonisation was the possibility of a

different sense of time – the 'emergence of the not-yet' (p. 14). Pushing the explanation, he continued to say that the dominant Eurocentric explanation of the world, with its presumptive universalism, had reached its limits: 'Knowledge can only be thought of as universal if it is by definition pluriversal' (Mbembe c. 2016: 19). He emphasised that he was not against what he called the Western archive: 'It is singularly complex. It contains within itself the resources of its own refutation' (ibid.). He was also against a simplistic de-westernising of knowledge. In this framing he suggested that the kernel of the decolonising project was that of developing a perspective 'which can allow us to see ourselves clearly, always in relationship to ourselves and to other selves in the universe, non-humans included' (Mbembe c. 2016: 23). Expressed, in these terms, I argue, decolonisation appeals for a new understanding of being (ontology), of knowing (epistemology) and of values (axiology). It embraces a radical sense of being in the world. Being in the world, explained Mbembe, involved the recognition and affirmation (and this is the extraordinary challenge that his explanation of decolonisation constituted) of deep democracy. The category of human was no longer sovereign. Humans shared the world with other forms of being:

> Our world is populated by a variety of nonhuman actors. They are unleashed in the world as autonomous actors in their own right. ... At stake ... once again, are the old questions of who is whom, who can make what kinds of claims on whom and on what grounds, and who is to own whom and what. ... It is about humankind ruling in common for a common which includes the non-humans, which is the proper name for democracy.

> To reopen the future of our planet to all who inhabit it, we will have to learn how to share it again among the humans, but also between the humans and the non-humans. (Mbembe c. 2016: 24, 26-27)

Expressed thus, Mbembe brought the South African decolonisation discussion into a significant dialogue with the post-human critique of Rosi Braidotti (2013) and Bruno Latour (2013: 234). Central to this post-human critique was a profound radical questioning of our anthropocentric logic which as, Latour lays it out, is a logic of denial: '[the denial of the] the pluralism of modes of existence. ... This is what we have done with the beings of metamorphosis ... we denied [their] objective existence' (ibid.). Confronting the bifurcated logic of this denialism, he urged, 'we have to approach the other side of the **BIFURCATION**' (ibid.).

In bringing this part of the discussion to a close, the first concluding point to make is that the decolonisation discussion as we see it playing out in the South African context is as sophisticated and relevant as anything happening anywhere else in the world. But is it, the question needs to be posed, so comprehensive and encompassing that we all should simply allow it to take its course?

In response to the question above, I want to argue that no theory is ever complete. It always has blind spots. Our theorising needs to continue. What then, the question follows, are the blind spots of the decolonisation theory? How does it get us to Latour's *other side?* It is to a discussion of these blind spots in relation to our broader discussions in HIV-AIDS curriculum development that I now turn.

The HIV-AIDS curriculum innovation

Innovation in the HIV-AIDS curriculum bears similarities with innovations happening in other fields. It is, however, distinctive in one respect. That distinctiveness, I suggest, is the concern of the HIV and AIDS discussion with affect and emotion. It is against this that I return to the question of the blind spots of the decolonisation theory.

To get to the blind spots of the decolonisation paradigm, it is necessary to examine the tension I spoke of above lying between the black intersectionalists and the post-humans. What is that tension? It is that of the question of the black body. Critics such as Rudin (2017: para. 28) argued that the black intersectionalist approach fetishised the black body – 'a re-racialisation has occurred' he argued. Prah (2017) and Mbembe (c. 2016) are motivated by similar concerns. Their general critique, I suggest, is correct. But there is cause for pause.

The value the black intersectionalists bring is the focus on the existential, the focus on the hard-to-explain pain of racism. The form in which this pain is presented is through embodiment – the black body – *black pain.* Black intersectionalists come to this pain, it can be argued, through an engagement with the multiple dimensions of the pain of racism but essentialise it around race. They over determine it in racial terms. While they themselves would argue that the pain has multiple origins and causes, their approach is to reduce it to the singularity of race. This is an issue. The problem is essentially its exceptionalisation. That other forms of pain might exist with greater or even just different dynamics is what this argument does not make allowance for. In exceptionalising the blackness of the pain, they open up an argument about the relative merits of the severity and intensity of some kinds of pain over others. But it is their insistence on the fact of its reality to which we should be paying attention. We should be trying to understand it, even when they say that it is none of our business and that only they have a right to talk about it. On simple human grounds, this is a morally untenable position. It is not sufficient, as the black intersectionalist position has tended to do, to simply state that the pain exists.

It is here in the moment of articulation of pain that the blind spot in the decolonisation discussion presents itself. The black intersectionalists step back from the challenge of explaining the pain. The post-humanists do not deal with it. The former, in presenting it, leave it suspended in midair. Clarification of what it is, is provided in the naming *only* of the very thing which it is required to explain – the black body. Look, it says, at my body. This line of reasoning is essentially *ostensive.* An ostensive description or definition, essentially, is one that invokes what are thought to be examples of the condition to define the condition itself:

> A definiens is communicated by either literally pointing to or otherwise indexing a case in which the definiendum is thought to be in evidence. ... Thus, one may give an ostensive definition of 'pain' by pointing to a person in the throes of a toothache and saying … 'This is what pain is like.' (Royzman, McCauley & Rozin 2005: 22)

How one moves beyond the ostensive is what is required. The challenge that arises, following Mbembe, is that of developing a perspective that 'can allow us to see ourselves clearly, always in

relationship to ourselves and to other selves in the universe, non-humans included' (Mbembe, c. 2016: 23).

It is here that the HIV-AIDS discussion is powerful. That power is evident in the way it takes us to the psychosocial complexity of the pain and locates it subjectively. It helps us understand the pain, in the way that the experience of the diseased body has been interpreted and described, in both its *social* and *individual* effects. This is what I now turn to.

But first, let us explain what is meant by subjectivity. Subjectivity is a human being's sense of him, her or cis-self. It encompasses an awareness of individuals of their relationship with the social and physical order surrounding them – all their ways of making sense. In these terms, it includes but is more than identity. Individuals' capacity to act – their sense of agency – is shaped by their subjectivity. Through subjectivity, individuals come to a sense of how they will make judgements and decisions about the things that matter in their lives.

How subjectivity works and comes to take shape in the presence of HIV-AIDS is, of course, influenced by the social realities – race, class, gender, and so on – that are at work in any society. In the same way that class conditions the experience of race, and vice versa, so, it can be said, that the experience of HIV-AIDS will always be influenced by the social forces that surround it. Subjectivity, in relation to HIV-AIDS, is inescapably shaped by intersectional actualities. HIV-AIDS, as a determinative force in the making of subjectivity, is always going to be complex. It shares with other social factors, the same intersectional dependence.

There are, however, ways in which it works differently to other social factors. This relates to the ways in which the pandemic has thrown South Africans into a new psychosocial environment where trauma, and particularly the trauma of young and early death, has reconstituted the base conditions for shaping ideas of the self. Death, especially early death, has affected the making of subjectivity in deeply important ways. For the purposes of this contribution, these effects are evident at the individual and at the social level.

The effects of dying at the individual level and their impact on subjectivity have not been well studied. The recent work of Henderson (2012) is an exception. Wood, Reddy and I argue that the existential immediacy of HIV-AIDS deliberately raises the challenge of how one lives alongside the other (Wood, Soudien & Reddy 2016). But it is not just about living alongside each other. It is also dying – living with dying. Dying is, of course, deeply formative of subjectivity. Everywhere. But dying in times of an epidemic produces new ontological conditions that people have to make sense of – individually and socially. HIV-AIDS has reconstituted the conditions of coming to a sense of one's subjectivity, subjecthood and personhood in South Africa. Wood et al. argue that an intersectional approach to HIV education will stimulate a number of beneficial effects to enhance empathy, compassion and improved human relations:

> The HIV and AIDS pandemic in South Africa provides scholars of the social and cultural life of the country with an important opportunity to make sense of the dynamics that animate how the country works, how people relate to each other, and how new and innovative social pathways can be developed for imagining the country anew. (2016: 157)

Helpful in giving a sense of what these new and innovative pathways might be is Henderson's (2012) *A Kinship of Bones*. Henderson lived amongst the people of Okhahlamba at a time when the AIDS epidemic was at its most destructive. Antiretroviral treatment was not yet available. The work describes how the community of Okhahlamba drew on complex social, cultural and biological knowledge affordances, configured in all kinds of ways, to cope. In the process, they struggled. One sees the full range of human strengths and weaknesses at play. In order to draw the complexity of this out, Henderson had to earn the trust of her fellow human beings at their most vulnerable. It meant – and this is evinced in the work in the most extraordinarily self-effacing way, no hyperbole, no theatrics – that she had to participate and embed herself in the lives of the human beings with whom she worked in selfless ways. She washed their feet as they did hers. It is her empathetic working with the contingencies of death that is most important. Aside from Henderson's own sense of mutuality, critical in this examination was the ethic of care. This ethic of care provided individuals in this setting with the subjective resources to approach pain in ways that did not reduce it to an essential factor or cause – it was not black, it was not working-class, and it was not gendered. It was utterly human.

At the social level the experience of dying, and this has happened countless times over every day, is forcing people to enter, make and sustain relationships on a basis that relegates the socially constructed orders of race, class, gender and whatever. The story of Henderson's (2012: 70) very first meeting with Mandla Shabalala in Okhahlamba is instructive:

> On the 7th of October 2003 … Sizakele Mdunge, a home-based carer from a neighbourhood in Okhahlamba accompanied Phumzile and myself to the home of a very ill man. ... Like many others in his position, he had returned home when already very ill. Unusually his girlfriend accompanied him. It was she who took out his identity document and his payslip to show us where he worked. Out of respect, I did not open his payslip to see his wage, although his girlfriend later suggested that I do so. It seemed shameless to me. I had already been invited to look at Mandla's swollen shoulder. I preferred to hear his strong, yet pain-filled voice. What was the best way of witnessing a man's pain and his simultaneous resistance to the state in which he found himself, of acknowledging the corrosive effects of his flesh?

The point about this experience is not that it represented an ideal assertion of humanness. The humanness that came to express itself here was complex. The core quality at work in this humanness was care. But it was never uncomplicated. As Henderson (2012: 80) explained, care was not unequivocally moral. Instead, it was threaded through with more dubious aims. She quoted Adam Philips who said of these moments:

> If the best thing we do is look after each other, then the worst thing we do is pretend to look after each other when in fact we are doing something else. ...This distinction, upon which of our morality depends, is often spurious because we are always likely to be doing both things at once. (ibid.)

There are many things at work in the development of the emotional here. The critical point about these many things is that they were irreducible to a singular determinative force. There was simple human goodness at work, as there was sheer human indifference and indeed all kinds of emotional frailty. The point is that none of it was able to be factored and distilled down to a singular essence.

Instead, more poignantly, all the players brought a deeply complex sense of their dignity and what their dignity stood for into play.

Expressed socially, this care was constitutive. Subjectivity took new and innovative routes. One sees in the Shabalala homestead clan familiar ways in which it took expression but there were, also, in innovative ways, new solidarities and boundaries being formed. Mandla Shabalala rebelled, in his illness, against what was expected of him as a clan and family member. He, for example, decided to use what power remained at his disposal to dispense patronage in ways that were unexpected. He gave his money to his girlfriend, who he sent away to her Transkei relatives. He did not insist that she return to look after him (Henderson 2012: 78). None of what he did, and this is important to make clear, was reducible to his race, class, gender or other affiliations. All these factors were at play and found expression in different moments and under very different kinds of stimuli. But none was, and this is the key point, over determinative. Affect and its place were deeply important.

But it was important at the individual level too. As the disease took hold of Mandla's body, he continued to demonstrate complex understandings of what his sense of personhood was all about. In this, he demonstrated a critical sense of self-care. He performed on himself and for himself what, in a Foucauldian way, amounted to a deep sense of himself. He did this in a way that indicated an awareness of the question of what, in himself, he needed to attend to. As Foucault (2001: 51) put it in his *Hermeneutics of the Subject,* he silently asked of himself 'what is this thing, this self to which one must attend?' Foucault's recovery of the idea of self was aimed at and focused very much on the making of a self-contained philosophic disposition: the care of the self came to incorporate 'autonomous, self-finalized practice' that would comprise 'the fundamental definition of philosophy' (Foucault, 2001: 81). But he also, less demandingly, referred to the purpose of self-care being simply the attainment of 'the art of living.' I suggest this is what was happening in the process of dying in the HIV-AIDS environment. People focused on how to compose for themselves the art of living. They became self-formed subjects. Their objective was finding out about themselves – the 'truth of [their] being' (Foucault, 2001: 308).

Conclusion

Why is the experience of HIV-AIDS so important for thinking about decolonisation? It is important in two respects. The first relates to subjectivity and the second to the curriculum. With respect to the first, through the experience of HIV-AIDS, we begin to intuit, beyond the social, a more complex sense of the subjective and subject formation. With respect to the second, the opportunity arises for thinking through the idea of curricular praxis in fundamentally more democratic ways.

How does HIV-AIDS make possible pathways towards a deeper sense of subject formation? It does so, I argue, through the ways in which it compels the individual and the people around him or her to confront the reality of his or her body and to deal with what that reality constitutes. As the Henderson example above shows, dealing with that reality involves (often but not always, I

accept) an engagement with the complexity of one's self which requires an acknowledgement of one's physical state, one's body, in ways that exceed the social logics available to one through one's social history. What follows in a person's subjectivity is dependent on how the social and this sense of self interact. Engagement with the body does not have pre-scripted or, in an Althusserian sense, over-determined inevitabilities. At work is all the complexity of one's socially constructed life, race, class, gender, sexuality, religion and more, but so also is the complexity of the distinctive ways in which one makes sense of one's embodiment. The social is present but so too are one's affective frames of mind. How these come together is not reducible to a social singularity. This brings one, then, to a sense of caution about the overly socialised analysis of decolonisation and the identity categories with which it tends to work. While the decolonisation discussion recruits, and in some ways even depends on psychological states of mind, it manages the tension between the social and the individual in reductive ways. It is here that the specific individuality of trauma, before that trauma is generalised into a social phenomenon, has to be acknowledged. What emerges from most decolonisation discussions, I argue, is the naming of pain, but not its full amplitude or complexity of that pain. The categories of race, class, gender and so on bring us to an awareness of the pains involved in othering, as the decolonisation discussion does, but it does not fully engage with the specific ways in which that pain is worked with. This is the value of the HIV-AIDS discussion.

The discussion is also valuable in bringing to the fore the deep sense of self-awareness that the educator is required to demonstrate. Key in this discussion is the recognition on the part of the educator of the ways in which the affective conditions the experience of teaching and learning. The affective, I argue, constitutes a profound presence in the encounter between the educator and the learner. It is especially so in circumstances of woundedness. The pain brought on by racism (or indeed the othering power relations present in all forms of discrimination), indexed in decolonisation, has to be consciously acknowledged by the educator as he or she proceeds through the order of his or her engagement in a learning setting. That pain may be felt personally by the educator or it may sit in the ether of the classroom. The specific forms it takes have to be considered by the educator. Educators have to make repeated attempts to make sense of the pain and in ways that demonstrate deliberativeness on their part – manifest in the ways they account for themselves – in responding to it. In doing so, the educators have to make themselves vulnerable and accept from their learners that the pathways they are opening up are open to critique. But the critical requirement is that of awareness of self and awareness of others.

In closing, it is important to acknowledge the contribution of criminologist Tony Jefferson (2015) in his observation that an elision takes place in many explanations of the factors behind major social phenomena such as racism. This elision, he says, is the blurring of the lines between emotion and cognition: 'The emotional dimension of hatred and the cognitive dimension of prejudice have become erroneously elided (to the detriment of properly understanding either: the notion of positive prejudice completely disappears, for example)' (Jefferson 2015: 129). A similar point can be made about what happens in the dynamic of teaching and learning in the classroom. Present are formative affective influences which educators are required to understand. If they are

not aware of them and do not develop strategies to engage with them, they take away the potential for real learning to take place in the classroom.

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Troubling 'race' as a category of explanation in social science research and analysis

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Abstract

In this article, we problematise the use of the concept of race as a category of social analysis and commentary as it is used by academics, government, other social analysts and commentators. We argue that the concept has, regrettably, been used in a cavalier way in political, social and educational studies to 'explain' matters in ways that are reminiscent of apartheid 'science.' While the concept of race is critically important for understanding the impact and effects of the strategies, policies and practices of racist states on individuals, communities and societies, globally, and for thinking about the sociopolitical effects of racism, discussions about race are often trapped in ideas that have the effect of extending the very consequences that struggles against racism have sought to eradicate. Such approaches to the concept of race are insouciant about the potential for deepening the racist vocabularies, the metaphors, descriptions and stereotypes prevalent in the racist categories employed by the apartheid state and its ideologues. While racism remains highly prevalent and visible, it is critically important that the complexities of the use of race be recognised so that its usages do not have the effect of promoting racist political and economic systems and the discourses and practices associated with them. Explanations that use race as an analytical category must ensure that they do not provide justification for the ideologies and power of racist systems.

Key Words: race, racism, social research, educational analysis, analytical category

The concept of race has been used in a great deal of historical and contemporary writing. Especially in South Africa – but not only there – race as a social construct has had great importance both for understanding and explaining the racist social philosophy of the colonial and apartheid state, the impact of its policies and practices on the lives of the people of South Africa and, currently, for the complex task of redressing historical injustices perpetrated by South Africa's colonial and apartheid regimes. Indeed, it has salience in discussions about identity – especially about the elision of those identities on the receiving end of racist laws, practices and power.

But there are also profound confusions about how the concept of race is used when it refers to the racist categories employed by the apartheid state. It is important to unravel these confusions, especially in the continuing struggles against racist prejudice and stereotyping. This unravelling is pertinent not only to researchers, social scientists and scholars, but also to policy decision-makers in government, educational and other institutions. Politically, it has even wider relevance and social meaning than is contemplated in academic analysis and usage because the vocabularies of politicians, bureaucrats, business leaders and the public media are replete with race. The common discourse of parliamentarians, for example, shows little awareness of the important debates around the use of apartheid's racialised descriptions when referring to South Africans they identify as 'coloured,' 'Indian,' 'white' and 'African' (the latter being further variously named by an ostensible 'ethnic' or 'tribal' affiliation). Daily we hear of 'racial minorities' and 'nations' and other such nomenclature used to describe the citizens of South Africa. This suggests a lack of consciousness about the very contentious and historically offensive nature of these usages, and a complete disregard for the struggles to discredit the usage of such descriptions in the quest for nationhood and unity. Nothing, it seems, has changed from the staid and discredited conceptions of the racialised identities when they continue to be assertively restated in the following way:

> It is a self-evident and undeniable reality that there are Indians, Coloureds, Africans and Whites (national groups) in our country. It is a reality precisely because each of these national groups has its own heritage, culture, language, customs and traditions. (Yacoob 1985: 47)

It is clear that racial nomenclature continues to haunt the public consciousness, even after 1994, as ghosts of an unrequited past. Such usages are both reckless and unthinking and, as Alexander (1979) showed in his seminal writing on the national question, this has had the effect of reinforcing separatism and supporting conservative organisations intent on derailing the process of social change. As we have argued elsewhere:

> Despite the pre-apartheid expectation that the concept of 'race' would 'wither away' with the advent of a democratic polity and precisely because the Congress Movement has become the heir to the post-apartheid state, 'race' consciousness has remained very alive. The period of mobilization under the UDF and the National Forum towards a non-racial position notwithstanding, the position that is now the 'dominant paradigm' has reverted to the older multi-racial tradition of liberalism expressing the tenacity of the historical grip on the consciousness of the masses of the people. (Motala & Vally 2017: 142)

It is not surprising that, for some thinkers, the question of race was *the* social issue for the 21st

century.

A critique of the deliberate uses of the apartheid's racial categorisations in academic and other writings about social, educational, political, economic and other phenomena is therefore essential. This approach is not unmindful of the power and reach of the facticity of prejudice. As Alexander (1986: 84) warned: 'To deny the reality of prejudice and perceived differences, whatever their origin, is to disarm oneself strategically and tactically.' Yet it is no reason for misreading such prejudice as either excusable or disarming for the critique of racist systems. Such a critique in the context of the transition from the apartheid state unlocks the possibility of developing a framework of rights associated with being human – rights that attach to all human beings regardless of history, social location, cultural and linguistic attachments and other such attributes. If this is not done, the impact of the racist regimes of the past will remain in the material reality of the lives of those who continue to be plagued by its past and present effects.

Below, we deal with the prevalence of the uses of race as relevant to social explanation, distinct from its racist usages. Thereafter, we examine the myth of race as a biological fact, and its effects in perpetrating apartheid and other social systems. As we will show, the idea of race as a category in the natural and biological sense has been thoroughly discredited – despite attempts every now and again to resuscitate its biological foundations. Following this, we provide a concrete example of the problematic of apartheid nomenclature in social analysis, after which we set out a number of ideas to unravel the continued confusion that abounds in this regard, before making some concluding statements.

Race as potentially useful for social explanation

As a strongly prevalent social construct, the concept of race arises historically from the phenomenon of racism. It also has salience in recognising not only its perverse effects but also the struggles against it through assertions of 'blackness' (or 'black identities') as a trenchant reminder of the processes of colonialism, exploitation, slavery, oppression and the criminality pervasive in racist regimes. In that sense, it has considerable explanatory value for understanding the historical effects of racism, and how social relations are implicated in racialised identities, racist practices and the effects of these on entire communities within and across nation states. To that extent, blackness is more than simply 'the trope of the look,' or simply an ontological question, false consciousness or the 'error of philosophers' and implies, most importantly, an explanation of the material reality consonant with the political economy of Southern Africa and colonisation, more generally. The recognition of the political and social effects of racism is, simultaneously, the demand for an acknowledgement of its impact on the lives of oppressed people through centuries of human existence. Asserting this right is a deliberate act of negating the violence of enslavement, colonial and post-colonial rule and the brutality associated with the reconstitution of the lives of millions of human beings through this. The distinguishing characteristic of these assertions is a justifiable claim to a counter-hegemonic discourse against the globally dominant discourses and labels of racism. Indeed, here blackness is a signifier not merely of colour but of its meaning for

resistance against the defining attributes of racist discourses, policies and practices. In that sense, it is quite distinct from, and opposed to, the racist categories of the apartheid system, which did not admit to the concept of blackness or black political, social and cultural forms of resistance to racism. Blackness is a signifier of Biko's idea of the reclamation of dignity in black lives – in effect, a struggle against the selfsame racist nomenclatures and identity markers used by the apartheid state. Such an approach would – as did the Black Consciousness Movement in South Africa – firmly renounce the usage of the categories of Indian, coloured and Bantu.

Explanations about the use of race in the construction of racist regimes would account for the body of writing about the political economy of colonialism and apartheid developed to explain the extraordinary power of the racial categories of apartheid as both a consequence of, and a justification for, the particular form of capitalist development in Southern Africa (see, for example, Wolpe 1972; Legassick 1976; Greenberg 1980). As these analyses have shown, the impact of racist ideas on the construction of race as a sociological category is not a negation of the importance of social class, gender or other categories of social analysis. Indeed, the most useful study of society can be derived from a combination of these social categories (together with others like geographic location) thus avoiding reductive and mono-causal explanations. In this regard, Crenshaw et al. (1995) and Matsuda (1999) argue that the law is 'thoroughly involved in constructing the rules of the game' and was itself a 'constitutive element of race' – it constructed race as a category (Crenshaw et al. 1995: xxv). It shaped and was shaped by 'race relations,' not because it merely narrowed the scope of anti-discrimination laws (in liberal discourse) but through the very forms of law reproducing social power within liberal legal discourse. Its criticism of 'vulgar Marxism' was that whereas classical liberalism's approach to race was that race itself was irrelevant to race policy, the Marxists held the view that race as a category simply did not exist.

As a construct derived, in the first instance, from racist practice, race remains critical for understanding the history and evolution of apartheid capitalism or racial capitalism and is even more useful when understood in conjunction with other categories – all of which provide explanations about its evolution as a form of control over the movement and freedom of the black working-class and rural communities in South Africa. In this way, the category of race is used by critical social scientists to demonstrate the character of a racist capitalist state and their association with imperial interests, predicated on racist social norms and practices fostered for demonstrating particular forms of socioeconomic and political domination and exclusion. These explanatory uses *provide absolutely no justification for contemporary usages of the racialised and biologically determinist categories of apartheid* or an acceptance of the uses of the concept of race reliant on its phenotypical attributes. On the contrary, they are a strident rejection of these.

Why the uses of race must be problematised – sorting out the confusion

There is a need, however, to separate the political sociology of race as a category of explanation from its uses in the biologically racist categories defined by apartheid. This is because of the dangers inherent in racial (and racist) descriptions and because the concept is so 'pregnant with

confusion' and given to opportunist usages in the political, economic and ideological domains. The use of racist social classification was intrinsic to racism and its effects and the categories of race (especially Africans, coloureds, Indians and the derogatory terms that were associated with these descriptions) played a key role in entrenching racism and its impact. That is why we must examine these categories, consciously, critically and historically.

Regrettably, some academics remain untroubled by their usage of the racialised categories of the apartheid system for social 'explanation,' and continue to emulate approaches reminiscent of apartheid 'science.' This is compounded by the ubiquity of the vocabulary of racism in a variety of government documents (disregarding even the covenants of the Constitution), in the media and other places. Even more alarming is the uncritical use of these racist categories by universities and bodies such as the National Research Foundation, whose lack of understanding about the need to intervene in shaping the vocabulary and consciousness around issues of race and racism is startling. And there are instances where refusal to comply with these requirements is met with threats such as non-payment of entitlements like wages.

There is no reason why universities (and government, for that matter) cannot at least adopt an orientation that problematises the use of such categories if they regard such usage as justifiable for on the basis of the requirements of affirmative legislation, funding, scholarship opportunities and the like. This troubling continuity in the use of apartheid racial categories takes no account of the larger social, historical, philosophical and practical implications of such usage. Can there be any justification for using the racialised categories derived from the ideologues of the apartheid state, unconstrained by any considerations of its implications? How is such usage reconcilable with the key pillars on which the resistance to apartheid was founded? And what is its meaning for our understanding of the proclaimed values of nation building, social cohesion, deracialisation and the like, referred to in a wide range of policy and other documents intended to signify the beacons of a democratic and non-racial society. The absence of any serious attempt to deal with these issues has left the field wide open to contemporary usage that sometimes borders – in a wide range of public communications and academic exchanges – on nothing short of the unconscionable practices of the past. Despite the injunctions about transformation, confusions abound where race is not problematised and, worse still, irreconcilable attempts at providing justification for the usage of the racist nomenclature prevail. What are some of these?

First, the argument that avoiding the use of these racist apartheid categories or objecting to them is a failure to understand the impact of racism on the lives of black people. On the contrary, their continued use today constitutes and deepens racist stereotypes and practice, give them substance – even if not legally. Worse, it entrenches them in the public vocabulary as though these categories were not merely social constructs and *as though the proclaimed races exist.* This argument is seriously misplaced –even the need to collect data for the purposes of addressing the effects of racism does not have to follow apartheid categories in an unproblematised way.

We argue, therefore, that avoidance of the use of racist categories is not avoidance of describing racism and its impact for what it is – inhumane, dominant and barbaric. The continued use of these

racist descriptions is to give life and meaning to racism. We absolutely must find alternative ways to describe oppression and exploitation and its effects without resorting to apartheid's science and deepening its social meaning making. We cannot avoid the association of racist categorisation with racism – that's what it has always been intended for, given that the descriptions derived from racist ideologues are constitutive of, and give life and lease to, racism and its practices, prejudices, stereotypes and effects.

Second, the failure to problematise racial categories is sometimes justified for the ostensible reason that it has public currency. We are told that their 'acceptance' by the 'ordinary' public gives them legitimacy and that since, in the 'public' perception race constitutes a 'reality,' it is hardly possible to wish it away. This, it is alleged, provides justification for the continued and unmitigated use of racial categories. The reality of the existence of race as a 'social fact' means that we have little option but to accept its current usage and must recognise its value for the purposes of social classification. The further argument is that racialised classifications are no more than a reflection of what is 'self-evident' because they speak to the observable physical (and any other) differences that exist in the human population – a reality that has registered a firm imprint on the consciousness and understanding of human beings both in South Africa and worldwide; a 'fact' evidenced in the discourses, descriptions and social interactions of people everywhere or, as is now fashionable, to point to the congregation of students along 'race lines' in educational institutions and elsewhere. It is as though, the reality (unaffected by any consideration of what lies behind it) that millions of people accept these racial descriptions for themselves and for others suddenly gives these descriptions legitimacy.

This argument (because people see themselves in racial terms, racialised descriptions are unavoidable) is a mistake since, in reality, it lends credence to the ideas of racists. The persistence of apartheid's deliberate racist categories can be ascribed, in part, to their continued usage for the ostensible purpose of reshaping the postapartheid racial landscape in particular ways. This has had the effect – unintended or otherwise – of enhancing the possibilities for a postapartheid social formation that ultimately supports particular forms of privilege and social mobility and new forms of exclusion. The question that must be asked is whether these approaches to 'transformation' represent the aspirations of the oppressed and exploited, as a whole, or entrench new forms of social bifurcation – gendered, geographic and class-based – and continue to reproduce the regimes of the past for a privileged minority. A different approach to social justice and equity must surely speak to the lives of the oppressed and exploited classes *as a whole,* and find ways to address this issue without creating new forms of social difference – especially through relying on pernicious apartheid racial descriptions.

Related to the above is the consciously political, but specious, argument about the necessity of using racial categories because of their value in the very process of designing policies and strategies for the deracialisation of society and for purposes variously described as redressing historical imbalance, ensuring that the playing fields between the races are evened out and for providing affirmative and positive discrimination possibilities to those who were and continue to

be the victims of apartheid's legacy. In this approach, tracking the progress of affirmative action policies and their impact necessitates the continued use of racial categories, especially in the data (and in the analysis) that is produced to evaluate the progress of any such policies and strategies.

But this approach, in reality, serves mainly to confirm – through its use of such racial classifications – the impact and pervasive effects of racist practices as a critical historical factor. It speaks to the causal relationship between racist policies and their discriminatory and adverse effects on the population defined racially. Affirming the effects of racial policies ex post facto by using racial classification can hardly bestow the use of such categories with meaning for analytical purposes in the social sciences. The fact of race as a descriptor of its effects must take proper account of more fundamental questions about its efficacy for social analysis in the first place, its effects on social consciousness, the continuance of its legacy either by default or the failure to deliberate over its implications for the underlying social philosophy enunciated in the struggles against racism. Moreover, as debates around racial admission policies at universities show, there are many other ways of recognising the impact of race for affirming the opportunities for access to higher education (such as gender, geographic location, social status, socioeconomic background, previous opportunity, types of school access) that have much greater moral, political and historical value than the reprehensible racist categories of the past.

Importantly, therefore, the distinction we make is between racism (whose consequences were structural – political, social, economic and cultural – and personal) and its rationalisation (by the unmitigated use of racial categories whose purposes were and are intensely ideological – supporting belief systems whose effects have actively wreaked havoc on human society). In a recent interview, Barbara Fields, co-author of *Racecraft: The Soul of Inequality in American Life,* says:

> We see race not as a physical fact, but as a product of racism. And we see racism not as an attitude or a state of mind, like bigotry: it's an action. It's acting on a double standard, with that double standard itself based on ancestry or supposed ancestry. (Farbman 2015: para. 9)

The interview refers to the need to overcome the ideological legacy of racism not only as bigotry but also for its social effects where social inequality is regarded as the product of 'personal responsibility,' supplanting any attention to persistent and structural racism and focusing on 'race and "race relations"' (ibid.: para. 3); 'this could not have been possible without the enshrinement of race as a natural category, the spread of the fiction that certain traits define members of one "race" and differentiate them from members of other races' (ibid.: para. 4). It should be clear from these arguments that the use of racial categories following apartheid's policies impedes a proper understanding of racism and reproduces the use of racially based explanations that are, themselves, constitutive of racism – negating the possibilities for overcoming it.

Understanding the impact of racism and the validity of some of the critical usages of the concept of race for explanation requires us to make distinctions between racism as social explanation and race as simply an uncritical acceptance of apartheid racial categories. The failure to do so is to continue

to ascribe fixed and essentialised identities, perverse stereotypes and hidden prejudices and to deepen the impact of oppressive and exploitative ideas and practices and the relations of power, social status, and privilege and advantage that flow from them throughout the world. We must be able to distinguish the socially constructed usages of race for its impact from the mythology of race used to justify the bogus science entrenching racist stereotypes and naked prejudice. For this a new vocabulary is necessary because there is no logical reason for inferring the reality of race from the fact of racial prejudice (Alexander 1979).

The myth of race

We know occasional practice is to refer to the employment of apartheid's racial categories using inverted commas or by providing an explanatory caveat about how and why they are used. Both approaches problematise the categories and proclaim the user's reservations. These caveats invariably refer to the necessity of using such categories by reference to extant apartheid-era data reproduced for the purposes of historical analysis, seeking in the main to demonstrate how apartheid policies deliberately set out to provide race-based education and other services, or to demonstrate the efficacy of its odious policies and practices for promoting racially defined social division, namely, to entrench more systematically the policies of the apartheid regime. But this is not always the case because in many instances, and especially in the case of psephological surveys, other opinion and behavioural investigations more generally, apartheid racial categories are often used unhesitatingly and without reservation.

Critical uses of the concept of race should, therefore, evince an awareness of its limitations since extant writings from as early as the 1940s, in particular, provide a useful approach to the meaning and usage of racial categories, even though they did not have the obvious benefits of subsequent developments in genome studies that have taken matters considerably further in so far as how the ostensible 'biological differences amongst the races of man' were understood. This earlier writing refers principally to the 'myth of race.' Ashley Montagu's (1942: 3) publication, *Man's Most Dangerous Myth: The Fallacy of Race*, provides a systematic refutation of the myth of race as a determinant of human behaviour, demonstrating how it was used by Hitler 'in a masterfully murderous ploy of mass psychology, mobiliz(ing) the German state to cleanse itself of "the enemy within."'

Unsurprisingly, after World War II, in the 1950s, UNESCO devoted a series of publications to this issue, hoping to penetrate the thicket of mendacious pseudo-science produced by the ideologues of fascism through their notions of race and racial superiority. Juan Comas (1951) deals with the question of racial myths in his monograph of that title for the series, and explains the misuse of Darwinian evolutionary theory for 'hateful and inhuman' purposes – converting these into the ideas labelled 'Social Darwinism.' In Comas's words, 'it is a thing which bears no relationship to Darwin's purely biological principles' (ibid.: 9). He explains how the progress of biology was

> misused to provide superficially scientific and simple solutions to allay scruples on points of human
> conduct. . . . It is obvious that the psycho-somatic inheritance does influence the external

appearance and the conduct of human beings, but that does not warrant the argument of the racists that (a) biological heredity is the sole important factor or (b) that group heredity is as much a fact as individual heredity. (ibid.: 9)

UNESCO's own formulation of these ideas is contained in its Statement on the Nature of Race and Race Differences by Physical Anthropologists and Geneticists, which proclaims in no uncertain terms:

> Scientists are generally agreed that all men living today belong to single species, *Homo sapiens*, and are derived from a common stock, even though there is some dispute as to when and how different human groups diverged from this common stock. (UNESCO 1951: 1)

Dunn's (1951) contribution to the UNESCO series explains how a greater understanding of the mechanism of biological heredity allows us to make clear and unequivocal pronouncements against the social conceptions of race and the strong inheritances of cultural practice 'transmitted outside the body, (through) language, custom, education and so on' (ibid.: 6). Dunn argues the judgment of science is 'clear and unequivocal':

> The modern view of race, founded upon known facts and theories of heredity, leaves the old views of fixed and absolute biological differences among the races of man, and the hierarchy of superior and inferior races founded on this old view, without scientific justification. . . . This change in biological outlook has tended to restore that view of the unity of man which we find in ancient religions and mythologies, and which was lost in the period of geographical, cultural and political isolation from which we are now emerging. (ibid.: 5)

More recently, a wide literature has developed – critiquing biologism, the reductive use of science for arguing a determinist role for genetics and biology. Sussman (2014) speaks about the perplexing reality that, despite the acceptance by the great majority of researchers on human variation that 'biological races do not exist among humans' (ibid.: 8) based on a great deal of evidence supporting this, belief in the existence of races persists. He contends that 'the belief in the reality of biologically based human races' and its racist connotations are prevalent in both the United States and Western Europe (ibid.: 2):

> It seems that the belief in human races, carrying along with it the prejudice and hatred of 'racism,' is so embedded in our culture and has been an integral part of our worldview for so long that many of us assume that it just must be true. (ibid: 3)

Referring to a critique of the ideology inherent in some approaches to the neurobiological sciences, Rose and Rose (1976) argue that many of the theories associated with it are fundamentally biologistic. By this, they assert:

> Biologism takes one part of the explanation of the human condition, excludes all other considerations, and announces that it has *the* explanation. . . . Attempting to change the human condition is then presented as an absurd opposition to both our natural selves and the natural world. The everyday possibility and actuality that men and women have continuously changed their situations in the course of history is methodologically and philosophically excluded. Biologism, for all its apparent scientificity, is thus mere ideology, the legitimation of the *status quo*. It is a method

not of explaining people, but explaining them away as 'nothing but' assemblages of larger molecules, larger rats, naked apes or hairy computers. In biologism, reductionism, which was originally simply a powerful tool for examining specific problems under rigorously defined conditions, becomes saturated with ideology (ibid.: xx).

Somewhat similarly, Polkinghorne (1996: 2) talks about the need to adopt a richer, more textured and rational account of the world not entrapped within the 'procrustean oversimplification of fundamentalist reductionism.' Importantly, he writes about geneticist Richard Dawkins' views on the related nature of the experiences of human affection and scientific wonder. Referring to interpretations of Dawkins' writing about the selfish gene, he avers that Dawkins also 'called on us to transcend the narrow motivations of the selfish gene and to repudiate those notions of eugenics or racism that might have seemed to follow from a policy of genetic survival at all costs' (ibid.: 1).

Robin Holliday (1981: 4) echoes these ideas in criticising the 'vogue for using well established principles of animal behavior as applicable to human behavior' in the controversial field of sociobiology that 'attempts to provide a more biological basis' for explaining human and social behavior. Even Appiah (1985: 21), who is sceptical about the conclusive nature of the evidence about human races, concedes, critically for our purposes, that there is 'widespread scientific consensus on the underlying genetics' and that

> every reputable biologist will agree that human genetic variability between the populations of Africa or Europe or Asia is not much greater than that within those populations; though how much greater depends, in part, on the measure of genetic variability the biologist chooses.

Talking about the biological use of race, Morris W. Foster and Richard R. Sharp (2002) refer to the tension in genetics research between those who regard racial and ethnic categories as meaningful for biology and those who argue that 'these social classifications have little or no biological significance' (ibid.: 844) They criticise the way in which geneticists approach the relationship between racial and ethnic identities and genetic variation saying:

> Inclusion of racial and ethnic identifiers in genomic resources can create risks for all members of those identified populations and influence lay perceptions of the nature of racial and ethnic groups. Thus, the burden of showing the scientific utility of racial and ethnic identities in the construction and analysis of genomic resources falls on researchers. This requires that genetic researchers pay as much attention *to the social constitution of human populations as presently is paid to their genetic composition* [emphasis added]. (ibid.: 844)

In other words, their usage in the political and popular discourses can hardly be interpreted as having the explanatory value attributed to them by some socio-biologists.

These and other writings (see, for example, Evans 2015) are used here mainly to illustrate the evolving wisdom that was accepted as received knowledge amongst scientists and other attentive associations and communities even as early as the 1950s. We need hardly be reminded about the considerable developments in progressive (anti-racist) thinking – some of which might even be critical of the weaknesses of earlier formulations not informed by genomics, and concerned primarily with refuting fascist ideas.

Regrettably, these considered explanations and arguments about the (in)validity of racial social categorisation and its impact on societies here and elsewhere have not been taken seriously. Although the condemnation of racism and its practices is the subject of legislative sanction and trenchant disapproval, the relationship between these denunciations and the continued use of racialised categories seems to have eluded understanding and analysis – even in the writings of some social scientists in their failure to consider the implications of such use for analytical and explanatory purposes. Worse, the unproblematised use of racial categories is widespread and often found in planning, policy, and strategic documents, public and private data sources, in the language of government and politicians, state, and non-state institutions, the courts and the media. No wonder it has continued to have a pervasive grip in the public discourse that, unthinkingly, evinces the continuities of the racist discourses of apartheid, threatening to undermine the hopes and aspirations of those who seek a society free of the blight of racist ideas, and a vindication of the sacrifices made by those who struggled against it.

What are the implications of the use of explanatory categories in social science research and analysis?

What, then, of the need for classification as necessary to social science and other explanation? Classification and categorisation is, of course, an essential activity for human beings and central to much of science. Human civilization is characterised by the penchant for systematisation – for seeking order from the chaos of impressions and experience. This is reflected in the systematisation of the sciences, their classification into the pantheon of scientific disciplines recognised as such. In regard to the social sciences in particular, the World Social Science Report says:

> The social sciences are concerned with providing the main classificatory, descriptive and analytical tools and narratives that allow us to see, name and explain the developments that confront human societies. They allow us to decode underlying conceptions, assumptions and mental maps in the debates surrounding these developments. They may assist decision-making processes by attempting to surmount them. (2010: 9).

In effect, scientific explanation is distinguishable from mythology, dogmatism and metaphysical speculation. Reliable explanation is discernible relative to simple description, providing new understanding of that which is to be explained (the explanandum). It is generally complex and could be 'a regularity or law or may be a theory about such phenomena or regularities' (Cornwell 2004: 174). Such explanations stress the attributes of empirical adequacy, logical consistency and applicability in a wide range of situations, even though it is recognised that, especially in the social sciences, attention must be paid to the context of applications that are not capable of the control and regulation that natural scientists aspire to – Heisenberg's Uncertainty Principle notwithstanding.

Accordingly, the ability to categorise social and natural phenomena by reference to their shared properties has long been established practice. It would be hard to imagine the level and state of

bewilderment in human life without such classification. Over the millennia, natural philosophers and, more recently, scientists have established the necessary taxonomies to provide the grounds for their explanations of both the physical properties of matter, and of social life in all its dynamic complexity. The ability to classify things is, in fact, a critical attribute of language since language facilitates making distinctions between things and groups of things – employing nouns for the purpose. There are, of course, several caveats about the applicability and use of classificatory systems since they could have the effect of obscuring individual identities, and obfuscate the power of classificatory knowledge, as was the case with the apartheid state.

There are, of course, debates about approaches to the problem of explanation. Some explanations are regarded as useful for revealing the essence of particular phenomena, are founded on the premise of causal structures, interactions and processes (referring to preceding events or based on the properties of constitutive entities). And there are approaches that rely on

> the deductive-nomological model of explanation, their source of explanatory power lies in the deductibility of the explanandum, under certain conditions, from some law-like regularities under which the explanandum is subsumed. Thus the more general the regularities are, the richer the resources of explanatory power they possess. (Cornwell 2004: 175)

In the physical sciences, mathematics has been preeminent as a tool of explanation and clarification. The penchant for mathematical logic has straddled scientific ideas across the millennia and not only Pythagoras (whose origins were Greek but who was inspired by, and lived in, Africa) but also Chinese, Indian and Arabic natural philosophers have been in its thrall (Huff 1993). There are explanations that are intent on providing causalities, more precisely, causal histories relying on a base of information that ranges from the very specific to the very abstract (Lewis 1986), even though it is possible to agree that such explanations are themselves incomplete.

Approaches to explanation are not uncontested. For instance, one criticism (relating specifically to the deductive-nomological approach to explanation) is that it 'gives no account of what the connection is that makes it possible to deduce the explanandum from the explanans' (Cornwell 2004: 175). The implication of this criticism is that there must a discernible relationship between the explanation (explanans) and that which it seeks to explain (the explanandum).

Amongst the many radical social scientists, David Harvey is concerned with the problem of explanation. Particularly important is his examination of the differences between explanation in the natural sciences and in the social sciences, and the debates about this provoked by J.S. Mills' 19th century view that there was no essential logical difference in these explanations. Harvey (1989: 44) concludes that these debates confuse a number of issues, exacerbated 'by failing to distinguish between the various views and activities that may be attached to the term "scientific" explanation' In his view, there can be no justification for arguing that explanations in these branches of science are necessarily or inherently different, that is, that they are different for all purposes and conditions, since the value of

> the scientific model must ultimately be judged by its use and effectiveness. If . . . the scientific

model (i.e. the model applied in the natural sciences) provides us with the only equipment for a rational understanding of empirical phenomena, then it would be foolish to deny the application of the model on essentially pragmatic grounds [while conceding that] it is, of course, extraordinarily difficult to assess the effectiveness of the model in the social-science context. (ibid.: 59)

These observations are useful for present purposes in illuminating the relationship between the tools of scientific explanation, such as the use of classificatory categories and what they seek to explain – their explanandum. They have little meaning otherwise. By way of illustrating this point, we take Slide 37 from a presentation by the Human Sciences Research Council (HSRC) made at the research indaba of the national Department of Basic Education (Kanjee, Frempong & Makgamatha: 2010). It illustrates the problematic of the usage of race in the data provided in answer to the question: Are the best schools good enough for ALL learners? (Table 1). The slide provides, on one axis, learner achievement (in percentages) relative to particular school quintile and, on the other axis, provides three categories in respect of these achievements (or lack thereof). These three categories refer to gender, race and home poverty quintile. What is the explanatory value of each of these categories of evidence? What analysis could be made using these categories or, to put it another way, what exactly is the relevance of these categories for the purpose of explanation and analysis?

Table 1: Are The Best Schools Good Enough For ALL Learners?

Background Characteristics		Percentage of learners not achieving (below 30%)		Percentage of learners in Quintile 5 schools	Percentage of learners in Quintile 5 schools not achieving (below 30%)	
		Mathematics	**LOLT**		**Mathematics**	**LOLT**
Gender	**Male**	76	53	11	43	20
	Female	74	39	14	40	11
Race	**African**	80	50	6	60	27
	Coloured	61	22	30	58	15
	Asian and Indians	43	20	69	25	5
	White	17	8	84	10	1

Home Poverty Quintile	1 = poorest	88	67	3	80	61
	2	82	55	7	66	34
	3	79	46	7	63	27
	4	78	44	10	59	18
	5 = least poor	57	29	28	26	5

Source: Kanjee, Frempong & Makgamatha (2010: Slide 37)

In relation to the questions of gender and poverty, the use of these categories has clear explanatory value. Moreover, they are recognisable and valid categories of analysis and are accepted as such amongst social analysts without question – indeed, they are accepted as categories of analysis across the political spectrum even though how they are used is contested (du Toit 2005). In other words, social scientists of whatever orientation recognise the validity of these categories of analysis and use them as such.

That is not the case with the category, race, since its validity is contested and its use in science is invariably accompanied with explanations that seek to justify it. It is, self-evidently, not unproblematised in the many instances of its usage. This is so because the unproblematised usage of the racial categories can lead to the conclusion that the ascription of a particular racial appellation to social groups *itself* provides the explanation to the phenomenon being explored – in the present example, the poor learner achievement of African and coloured learners, so called; the further implication is that those racial categories are inherently liable to such poor performance. On deeper examination, it is obvious that this interpretation could hardly be ascribed to the researchers in question because of the racism inherent in such an approach, unmitigated by all the necessary caveats that might ordinarily accompany such explanations. Yet the explanation (which, regrettably, is not fully explored in the case of this presentation) is, obviously, that members of society who are worst affected by poverty are the most susceptible to poor achievement – regardless of the racialised ascriptions given to them. If the use of the category, Indian and Asian, illustrates anything, it is this very phenomenon: those who have climbed out of the trap of poverty (even in relative terms) are no longer as susceptible to the effects of poverty. Although, as we know full well, even here further disaggregating of that category is likely to reveal serious differences between levels of achievement of those who continue to suffer the burden of poverty relative to those who do not. This in itself is argument enough to seriously question the usefulness of racial categories of analysis, used as they are.

The poverty of this analysis has captured, if nothing else, the continued effects of apartheid racism

as pervasive on those sections of the population who bore the brunt of the its policies, even though a small section of these (captured by reference to levels of social status, class, geographic location or income – though not gender) now evince characteristics that suggest they are beginning to climb out of these effects – once more, the critical variable being their new found class, social or other status. The implication of this analysis and explanation, based on the material realities facing learners rather than their racially ascribed identities, is that racialised categories are not merely conveniences based on their acceptance and usage in practice. They are obfuscatory, confusing and misguided. They continue to purvey the offensive terminology of apartheid's ideologues.

Even where the category of poverty is used, it could be enriched considerably since it interfaces and is deepened by a wide range of intervening and complicating factors of which perhaps the most profound is the meaning that is ascribed to poverty itself – and its relation to gender, social class, status, geographic localities, language, history and culture and other specificities affecting particular communities. Regrettably a similarly unhelpful approach is to be found in an article in the *HSRC Review* (Roberts, Weir-Smith & Reddy 2010), relating to a survey of social attitudes to the question of affirmative action, the argument being made:

> Evaluations of affirmative action were more positive among intended beneficiaries than those belonging to non-beneficiary groups. Therefore, black respondents were more supportive of race-based affirmative action than other population groups, particularly white respondents (Table 1). Over the interval, support among black respondents ranged between four and six times that of white respondents. (ibid.: 6-7)

Once again the circuitous nature of the 'explanation' is astonishing not only because of the authors' recognition of the causal effect of being 'beneficiaries' but also because, later in the article, the following advice is proffered!

> Policy-makers also need to find ways of overcoming the division created by affirmative action, potentially by repackaging preferential redress policies in ways that are less threatening and that appeal to the aversion for inequality shared by South Africans across the social, political and economic spectrum. It has been increasingly suggested that policy should concentrate more on a class-based redress agenda rather than focusing primarily on racial redress. (ibid.: 7)

What is suggested, therefore, is that researchers cannot uncritically reproduce the apartheid state's usage of racialised forms of consciousness, intended to serve its political and social hegemony, nor can they ignore the role of ideology in deepening division through the intolerable fostering of these forms of description. For social scientists, therefore, the task of using meaningful categories for social explanation is sometimes synonymous (even if not as daunting) with that of natural philosophy's millennial struggles to reverse the 'self-evident' truth of the geocentric worldview. Indeed, there are those who persist in this view to this day. Is it not self-evident that the sun rises in the east and sets in the west and goes round the earth in that way!

Conclusion

As we have argued, the concept of race has contradictory and problematic usages. While it has

value in pointing to the racism inherent in South African political economy, history, social psychology and sociology, and to the resistance against it, the concept needs to be consciously problematised in all its usages. More importantly, how race is understood has profound implications for the continued effects of the exploitative and oppressive practices of apartheid capitalism in South Africa and the struggles against these in the quest for a genuine democracy for all its citizenry. The concept of race has no salience *except* to explain how it was used by the ideologues of racism in the development of racial capitalism and the effects on Southern African society. Similarly, the concept of blackness is not to be misunderstood as a category of race – even though it might be misconstrued as such in some political discourses. As we have argued, it is signifier of the reclamation of identity, history, psychological integrity and a constitutive category of the struggle against racist capitalism. Its leading ideologues could hardly be accused of the racist usages of apartheid having vehemently opposed such usages.

There can be no reason to defend the uncritical use of racial categories in the social sciences or to emulate the obsequious science that characterised apartheid and fascist regimes. Approaches to the ideologies of racism that deliberately avoid the contextual history and ideological impact of racism in their alleged explanations must be obviated by a much broader range of analytical categories including social class, gender, geographic location, religion, language and culture and a wide variety of characteristics attributable to the title of citizenship – characteristics often obscured by the bluntness of racial classification. Phenotypical racial descriptions have serious consequences for how we think about the transition to a democratic state and society. These have little or no use in identifying the material and practical circumstances and conditions that affect social systems, and can have no useful explanatory or cognitive value other than to encourage futile and illusory enquiry and to deepen racist practice.

The arguments above should not be misunderstood to suggest that the racist impact of apartheid must not be dealt with by substantive policy and other measures (including wider public discussion) that take into account both the racist and other (gendered, social class, geographic, disability-based) mechanisms, which collectively constituted the ideological and practical foundations of apartheid capitalism.

The ubiquitous usage in the social sciences of the racist categories of the apartheid state is not only an indictment of the poverty of social thinking but is also a confirmation of the enduring role of racism in the consciousness of those who remain trapped within its nefarious frame. The task for social scientists – and especially for socially conscious scientists – is not only to provide scholarly analysis that has integrity but also to create, use and extend the vocabulary and reach of progressive and anti-racist critique and social praxis. The failure to do so is to capitulate to the continued hegemony and philosophical predispositions of apartheid's ideologues and their tainted ideas.

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Challenges facing life orientation educators in the delivery of sexuality education in South African schools

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Abstract

The life orientation (LO) learning area provides the primary vehicle in which comprehensive sexuality education, including reproductive health information, is delivered in South African schools in accordance with the Department of Basic Education's National Strategic Plan for HIV, STIs and TB 2012–2016, and Policy on HIV, STIs and TB, launched in 2017. This paper explores issues surrounding the implementation of LO in secondary schools from the perspective of LO educators and LO heads of department. Findings suggest that LO is not being implemented and delivered optimally due to constraints at the individual, interpersonal, school, district and community levels. Furthermore, resource shortages introduce significant variation in terms of the quality of education delivered between high- and low-resourced schools, whilst the expanded role and responsibility of LO educators in supporting learners' psychosocial needs in addition to academic development, highlights the importance of adequate training and institutional support at all levels.

Keywords: HIV and AIDS, life orientation (LO), sexuality education, South Africa, youth

Introduction

There is widespread consensus that schools should function as the primary sites for implementation of sexuality and HIV and AIDS programmes owing to their ability to provide a range of age and developmentally appropriate support and informational services to youth (Giese, Meintjes & Monson 2005), as well as linkages with community resources and services for sexual and reproductive health, substance abuse, gender-based violence and other social services (UNESCO 2010).

The South African education sector has heeded this call and since 2000/2001, the HIV and AIDS Life Skills Education programme has been implemented throughout schools via the life orientation (LO) subject area: a direct result of the 1999 HIV Policy (Department of Education 1999). LO is a formalised subject within the school curriculum designed to equip learners from Grades 4–12 (the programming for learners in Grades R–3 is referred to as 'life skills') with the values, skills and knowledge required to become responsible and productive citizens.

LO is typically facilitated by educators in school, although research has shown how external organisations may assist with this role (Tucker et al. 2016b). The responsibility for life skills education as conferred on educators seems logical in South Africa given that educators are regarded highly by adults and children in many communities (Blair 2001; Mannah 2002). Furthermore, the changing nature of domestic arrangements due to parental death or migration, and cultural and generational values creates barriers to discussing potentially sensitive matters like HIV and AIDS and sex in the home (Tucker et al. 2016a).

Evaluations of the effectiveness of South Africa's HIV and AIDS Life Skills Education Programme have revealed mixed results. For many learners, the LO programme has become a primary site for learning about sex and HIV and AIDS (Bhana et al. 2005), although the translation of this knowledge into improved prevention behaviour is somewhat inconclusive (Visser 2005; Department of Education 2006; Reddy, James & McCauley 2005). Recent studies into educators' roles in implementing life skills and HIV and sex education in SA have concluded that efforts to enhance educators' implementation of HIV and AIDS education need to focus on the broad social development programmes that improve school functionality and the quality of relationships between learners, parents, educators and community members (Mathews et al. 2006).

In recognition of the above, this research study used an ecological approach, incorporating the conceptual frameworks proposed by both Bronfenbrenner (1979) and McLeroy et al. (1988) to explore important individual, interpersonal, institutional and community-related factors emanating from school, peer and family microsystems that are associated with the implementation of LO. Attention is also granted to the linkages between microsystems, referred to as mesosystems within Bronfenbrenner's theory (1979). Previous school-based evaluations of HIV and sexuality education have identified key educator influences, including beliefs about the importance and value of HIV and sexuality education, life skills teaching experience, sense of responsibility towards learners, adequate pre-service and in-service training, comfort in teaching sensitive

subject matter as well as factors on the interpersonal and school levels, including senior management support and good school–community relations (Paulussen, Kok & Schaalma 1994; Mathews et al. 2006; Helleve et al. 2009). Within this conceptual framework and cognisance of previous research, this study identifies the challenges faced by educators in delivering LO across schools in different economic quintiles.

Methodology

Findings are drawn from a larger cross-sectional study conducted in 2011 evaluating the implementation of HIV and AIDS and sexuality education in South African secondary schools (George et al. 2013). A qualitative methodology was used to gather narratives from LO educators and heads of department (HoDs) regarding the facilitation of the LO learning area, with particular consideration of the processes and challenges at individual, interpersonal, school and community levels.

Sampling strategy and sample characteristics

The study was conducted in three districts in South Africa, namely, the Umgungundlovu district in KwaZulu-Natal, the North Tshwane District in Gauteng and the Bohlabela District in Mpumalanga. The selection of these three districts was guided by several factors including provincial and district pass rates for the 2010 National Senior Certificate (NSC) exams. North Tshwane (85.6%) and Bohlabela districts (40.1%) represented the best and worst performing districts in South Africa for the 2010 NSC (Department of Basic Education 2011), while KwaZulu-Natal (70.7%) was one of two provinces with a Grade 12 pass rate that was closest to the national average for 2010 (67.8%). The decision to focus on the Umgungundlovu district in KwaZulu-Natal was motivated by its comparatively higher antenatal HIV statistics, with 2012 estimates (40.7%) figuring some 10% higher than the national average of 29.5% (Department of Health 2013). Furthermore, the district has a more even split of no-fee (40%) and fee-paying schools (60%), introducing greater diversity in the sampling.

The selection of school sites was stratified across poverty quintiles (PQs). PQ ranks are calculated using national census data for the school catchment area, taking into account the unemployment rate, levels of income and literacy (education), with PQ 1 schools being the most economically vulnerable and PQ 5 least vulnerable. Ten schools were selected from the Umgungundlovu district using stratified random sampling, with two schools selected from each of the five PQs. In the North Tshwane district, three schools were randomly selected from the list of PQ 4 and 5 schools, while in the Bohlabela districts three schools were randomly selected from the list of PQ 1 and 2 schools to provide variation in schooling contexts. Only one school in the sample, in the Umgungungdlovu district, refused entry and was replaced by another randomly selected school in the same PQ.

Data collection and ethical considerations

Ethical approval for the research study was received from the Humanities and Social Science

Research Ethics Committee at University of KwaZulu-Natal. Relevant permissions were gained from the Department of Basic Education and individual school authorities. Informed consent was individually negotiated and documented with each participant.

In-depth interviews were undertaken in all the 16 schools with the HoDs overseeing LO, and the LO educators for Grades 9 and 11. A total of 45 educators and HoDs were interviewed (13 men and 32 women). Further details about the distribution of interviews across districts and poverty quintiles are outlined in Table 1. The interviews lasted approximately 45 minutes each, and were conducted in a private classroom or office during break times or free lesson periods. Educators and HoDs could decide whether they wanted interviews to be conducted in English, Zulu or Tsonga, with interviewers made available in the language of choice. Participants were asked to share views about LO lesson delivery and learner engagement and the role of LO within the schooling and community context. Select biographical data was also obtained from respondents during the course of the interview pertaining to qualifications, teaching experience, training and current staff appointments within the school.

Data analysis

Each interview was digitally audio-recorded, transcribed, translated into English where necessary, and imported into NVivo software, version 9. Thematic analysis was guided by the principles proposed by Gibbs (2007), Boyatsiz (1998) and Bazely (2007). During the initial coding phase, largely descriptive and categorisation codes were used, where segments of data were 'split' and assigned to multiple codes as recommended by Bazely (2007). Ryan and Bernard's (2003) techniques for identifying themes and Gibbs' (2007) and Boyatsiz's (1998) recommendations for quality codes guided the coding of basic expressions in the data. Following this phase, repeated comparisons and refinements were made across codes to form themes and sub-themes, which were then arranged hierarchically into a coding framework in the NVivo dataset.

At this stage, the coding process became more analytical and interpretive (Gibbs 2007), as Bronfenbrenner's ecological model (1979) combined with McLeroy and colleagues' (1988) Ecological Model for Health Promotion was employed. Themes that were believed to influence educators' delivery of the LO learning area were arranged according to their level of influence – per personal characteristics, interpersonal relations, school-level dynamics or community issues. The process of achieving inter-coder reliability, outlined by Hruschka et al. (2004), guided the coding process for the educator and HoD interviews.

Results

Results are organised against the ecological systems previously mentioned, as per individual characteristics, institutional practices like teaching allocations, interpersonal challenges emerging within the classroom and schooling environment and, lastly, community-level influences related to parental involvement and cultural norms. It is recognised that these systems of influence are not mutually exclusive, and that certain issues may intersect at meso-levels (like individual–school or

interpersonal–school) to impact the delivery of HIV and AIDS and sexuality education.

The LO educator as person and professional

At an individual level, attention is focused on the LO educators' personal characteristics and interests, as well as their professional competencies and skills for LO lesson delivery and learner engagement. Understanding the nature of these foundational qualities is important because participants in this study identified a number of roles and expectations for the LO educator that extended beyond academic training. The most frequently described roles were that of a guide or mentor (n = 13) in modelling responsible behaviour for learners, teaching about life and values, and promoting informed decision-making, or as counsellor or confidant (n = 19), in reference to the ways in which LO educators are often exposed to troubling personal disclosures by learners, as illustrated in the following remarks:

> I think life orientation teachers are probably a different breed of teachers, altogether, looking at what we have to deal with. I've had an instance where, a few years ago, one of our learners was being sexually abused by her father to an extent where she became pregnant and she wasn't sure whether the child was her father's or the child was her boyfriend's. I mean, these are, like, issues that we deal with. To some people it may be, 'how can this happen' but you develop such a thick skin that they tell you something really horrific or outrageous things that doesn't really shock you. (Mr S: LO educator at PQ 5 school, 29 years, Umgungundlovu)

LO educators across poverty quintiles had learners confide in them about the serious problems they were experiencing including rape, sexual and physical abuse, family problems, hunger, HIV infection, STIs, peer suicide, self-mutilation and depression. LO educators were often approached for assistance by learners to provide counselling and offer appropriate means of support. The following quotation reflects this duty of care as Mrs M reveals her sacrifice of time and material resources in supporting learner needs:

> You find that a child stops you, crying, and you ask, 'What is wrong with you?' And then she asks you to give her a specific time after the period to tell you a problem that is bothering him or her. Sometimes she will tell you that, 'it's the second week that I didn't eat anything.' So you can't only be an educator if you are teaching LO in this school, you are also even a social worker. Sometimes I even take from my pocket to give to them, because you can't teach a hungry learner. If a child is raped you need to go to the hospital, maybe to the police station. (Mrs M: LO educator/HoD at PQ 3 school, 38 years, Umgungundlovu)

Awareness of these emotionally and ethically charged matters draws attention to educator scope of practice, boundaries and the systems activated within schools to support learners. Results suggest that LO educators in lower PQ schools were often central in identifying learner problems while higher (PQ 4–5) schools reported more structured referral links. Owing to their support linkages, LO educators in PQ 5 schools tried to limit their counselling of learners to two sessions after which, if necessary, referrals would be made to a social worker or mental health practitioner practising inside or outside the school.

Most of the educators participating in the interviews valued their role as a counsellor and identified

the relevancy of LO for initiating conversations about the difficult realities impacting learners. For two specialist LO educators at one PQ 4 school, the opportunity to counsel learners and to 'wear the hat of a parent' lay at the cornerstone of their enjoyment of LO. Ms Z explains how LO educators are appreciated by learners for facilitating a space for conversations that may otherwise not be available in homes and in communities:

> If the teacher enjoys teaching LO, that teacher is usually loved more than any other teacher who comes into the class, make no mistake. Because we touch things that other people don't talk about, even parents. We go deeper, we make the child to be free to say whatever he feels like, whatever makes him happy, makes him sad. (Ms Z: LO educator/HoD at PQ 4 school, 55 years, Umgungundlovu)

It was encouraging to find that 34 of the 39 respondents (87.1%) teaching LO reported a desire to teach LO mostly because they liked the subject and enjoyed helping learners with the issues that the learning area covers. However, fewer LO educators reported that LO was their preferred subject choice (n = 26 or 66.6% of the sample).

HoDs in the study reiterated the salience of LO educators' personal characteristics, and motivated that LO be assigned to the educators deemed most trustworthy, approachable and genuinely concerned about learner well-being. However, negative personal characteristics could also influence which educators were assigned to teach LO, depending on the merits assigned to LO as a learning area. In the following account, one HoD explains how senior management purposively assigned LO to underperforming educators:

> They think that life orientation is an easy subject because it's not examinable. . . . That is why I was saying that when a teacher is absent a lot they give him life orientation. When a teacher has got ill health, they give him life orientation. When a teacher did not perform well in Grade 12 results, they switch him to teaching Grade 8 and also give him life orientation. That's the problem that we are facing. (Ms S: HoD at PQ 1 school, 44 years, Bushbuckridge)

In this way, the strengths or weaknesses of the individual educator intersect or are mediated by the broader mandate of the school and the implied value of LO as a learning area within the school curricula. Further discussion of these tensions is advanced in the following thematic area regarding institutional practice.

Implicated in the discussion of personal characteristics was the issue of age and maturity. The ages of the staff in this sample, currently facilitating LO, ranged from 23 to 56 years. For some participants, a youthful persona was identified as a positive trait for LO educators in order to increase relatability and advance learner trust regarding sensitive matters. However, as illustrated in the following quote, Mr Z suggests that young educators (particularly those in their early 20s) may lack the necessary life experience for a mentoring position, and may risk engaging in behaviours that contradict the values espoused by LO.

> I'm a teacher. I'm a father. I'm taking care of my own kids that are not here. Maybe that also adds to my confidence but I'm not sure about the young people. Maybe LO is given to a young boy or a young teacher, if I may put it in that way, because the young educators where you find that they're

22 years, 23 years, some of them they are also, they also like this sex, they can't discourage it because they are of that age but to us as the old people now, I think we are much better. (Mr Z: LO educator at PQ 3 school, 44 years, Umgungundlovu)

In addition to these developmental features and psychosocial capacities, LO educators and HoDs across school contexts identified the importance of pre-service training and teaching experience as a foundation for effective LO lesson delivery and innovative teaching practice. Participating LO educators held roughly eight years of teaching experience, but had spent far less time teaching LO, averaging only two and a half years. Differences in LO experience also emerged across poverty quintiles, with eight educators in PQ 4–5 and only one educator across PQ 1–3 schools reporting six or more years teaching LO. HoDs had on average 16.8 years of teaching experience, and 5.6 years of experience teaching LO. However, nearly a third of the sample (12 educators and one HoD) were only in their first year of teaching LO at the time of the interviews.

More than half of the respondents in this sample (53.8%, n = 21), had not received any pre-service training in LO. Specialisation in LO or related subjects like psychology or guidance were more likely within advanced educator qualifications, and were also more prevalent in PQ 4 and 5 schools (n = 13) as compared to PQ 1–3 schools (n = 5). These discrepancies were of concern because untrained and inexperienced LO educators were more likely to admit feeling ill-equipped for their role in counselling learners and dealing with sensitive subjects in class, as illustrated in the following disclosure by Miss L, a first-year LO educator:

Sometimes it's difficult to teach, like to explain LO to kids. Maybe like when they ask you how is sex, those things. You don't know how to tell them because if you tell them it's nice, they'll think, this teacher 'likes,' you know. So it's difficult sometimes to answer some questions. . . . Some things you don't know how to answer not because you don't know but how are they going to take you, are they going to respect you? (Miss L: LO educator at PQ 4 school, 26 years, North Tshwane)

Although the individual educator's predisposition, motivation and preexisting training are important for supporting confidence and skill in effective LO lesson delivery, the educator's overall ability and opportunity to execute the demands of the position needs to be understood within the web of institutional politics that impact staff appointments, allocation of resources, and departmental support.

Institutional regulations and support

Results represented in Table 1 reveal that 20 of the 39 (51.3%) staff taught LO and one other subject, eight educators taught LO and two other subjects (20.5%), while one educator taught LO and three other subjects (2.6%). Nine educators/HoDs, all within PQ 4 and 5 schools, specialised in teaching only LO (23.1%). In the following quote, Mr D explains the process involved in appointing LO educators at his school:

We are forced by the number of educators and the number of streams we are having because we are a small school, on top of that we have got two streams which is science and commerce, so we start by allocating people who are majored in these two streams – science and commerce – which is accounting, economics, physical science, mathematics. And then whoever is not allocated

according to these two streams, we'll then allocate them to do the life orientation, because there is no one who is majoring in this subject. (Mr D: HoD at PQ 1 school, 32 years, Umgungundlovu)

Table 1: Characteristics of schools, LO educators and HoDs in sample

| | | Schools | | | | |
Characteristic:	**PQ 1**	**PQ 2**	**PQ 3**	**PQ 4**	**PQ 5**	**Total**
No. of interviews per district:						
Umgungundlovu	6	6	4	5	6	27
North Tshwane	0	0	0	4	6	10
Bushbuckridge	8	0	0	0	0	8
Total	14	6	4	9	12	45
Educator's sex:						
Male	3	1	1	3	5	13
Female	11	5	3	6	7	32
Total	14	6	4	9	12	45
No. of LO educators	10	4	2	6	8	30
No. of HoDs/LO educators	2	1	1	2	3	9
HoD does not teach LO	2	1	1	1	1	6
No. of subjects in addition to LO						
Specialising in LO	0	0	0	3	6	9
LO + 1 subject	7	3	3	3	5	21
LO + 2 subjects	5	1	0	2	0	8
LO + 3 subjects	0	1	0	0	0	1
HoD does not teach LO	2	1	1	1	1	6

As with this example, internal allocations for LO largely came down to workload and subject considerations. LO was effectively spread across numerous educators, relegating LO to the position of a filler subject. For example, LO educators who taught LO and two other subjects only taught about two LO classes per five day cycle, compared to specialist LO educators who taught between six and 20 classes across three grades in the same period. Ad hoc appointments appeared to contribute to a higher turnover of LO educators as compared to schools with specialist LO educators.

Aside from teaching appointments, institutional influences pertained to material resources, assessment standards and the departmental support emerging from district-level subject advisors. The LO subject advisors' remit is to support LO educators in various capacities, which include school observational visits, resolution of issues pertaining to lesson content and delivery, the development, evaluation and moderation of assessment tasks, as well as the facilitation of

professional development opportunities for LO educators. Educators' reports suggest that not every subject advisor maintained this level of support, with substantial variation apparent between districts.

School visits appeared to provide the most beneficial support for LO educators across schools. Subject advisors for Grades 8–9 (General Education and Training, GET, phase) and Grades 10–12 (Further Education and Training, FET, phase) in North Tshwane and Grades 10–12 in Bushbuckridge visited educators at their schools at least once, if not twice, per year to review the work done in LO, check assessments and offer advice and support where needed. In addition, the subject advisors arranged training workshops for LO educators, and the Bushbuckridge subject advisor had arranged several awareness campaigns on teenage pregnancy and HIV and AIDS. Subject advisors for these districts were also more accessible to educators, as noted in the following account:

> We have an excellent relationship with Ms X. Previously we were colleagues . . . we all jumped up and down and complained about things that didn't happen, and we said, 'Ms X, you phone the Department and tell them something must get going now' and she did, and they said, 'Seeing that you're complaining so much, why don't you take the job?' . . . She eventually got it full time and she's really doing a stunning job. She understands what's going on in the classroom . . . so we really get wonderful guidelines and support from her. (Mr P: LO educator/HoD at PQ 5 school, 56 years, North Tshwane)

In comparison, the support received from the GET subject advisor for Bushbuckridge district and the FET and GET subject advisors for the Umgumgundlovu district were less favourable. Several educators who were new to teaching LO or who had been teaching for two to three years had never met with these subject advisors. There were some complaints by educators who had met with the subject advisors that they were critical in their approach, rather than offering support and solutions. Furthermore, the FET subject advisor for LO in the Umgungungdlovu district was a temporary appointment, holding another subject in their portfolio, which appeared to limit his presence at cluster meetings and role in conducting school visits.

Roughly 15 of the 39 (38.5%) LO educators had never been on any in-service training workshops or courses, including two educators who had taught LO for more than four years. Those educators who had been on in-service courses mainly attended workshops held by the Department of Basic Education pertaining to HIV and AIDS, peer education, teenage pregnancy and substance abuse. Communication difficulties with educators in rural areas, the challenges of getting transport to urban areas and the difficulties of finding teaching staff to cover for missed lessons in smaller schools made it difficult for educators, particularly rural educators, to capitalise on in-service training opportunities. There was also little mention of in-school forums where LO educators could share their training knowledge with colleagues. Absence of these sharing forums may impact the standardisation of LO delivery within schools.

In addition to variable teaching support and training opportunities, 20 of the 39 staff (51.3%) who taught LO identified a lack of resources as an impediment to teaching LO and attending to

learners' needs. Examples of desired resources included textbooks, visual teaching aids, equipment for physical education activities, information technology that included libraries and internet access, as well as designated LO classrooms and private rooms for counselling. Despite challenges in obtaining teaching resources, educators like Miss M sought inspiration in their environment to locate different materials for lessons and assessments:

> Like most of life orientation content, it touches 'all,' it's broader than just the content in class. So I would say I can look at the environment where I am, and then try and associate what is it that I can make an example [of], so to make it even [clearer for the] learners, like if there are any posters that I can bring. If they need to do research, the clinic sometimes it's very far from them, maybe I will collect – like when they had to do one on drugs, I had some magazines in my room so I brought it where they will check what type of drugs there are. So looking at that, [even our library] doesn't have so much resource that they can use, so sometimes I have to improvise and give it to them. (Miss M: LO educator at PQ 1 school, 23 years, Umgungundlovu)

While a lack of resources was one issue that compromised access to information and the delivery of LO lessons, assessment requirements were also identified as a significant area of concern that contributed towards decreased learner motivation and engagement and a growing sense of demoralisation among LO educators. In the following quote, Miss S expresses her disappointment at the trivial nature of departmental examinations, relative to the scope and depth of LO content covered.

> Yesterday, I was writing that scope on the board, and there's just lists and lists of stuff that we've done and the common exam from the department is 75 marks and they write for an hour on seven months' work and you just feel, 'Why did I try so hard and put so much effort in?' When all they are expecting these children to write is something that to me is not of a good quality. (Miss S: LO educator/HoD at PQ 5 school, 28 years, Umgungungdlovu)

These challenges underpinning educator selection, teaching capacity, resource constraints and district-level support make reference to a broader institutional climate regarding LO as a credible learning area, and the cascading effect on educator–learner relations, educator–caregiver relations, and staff relations.

Interpersonal dynamics

At an interpersonal level, participants reflected on the educator–learner relationships that inhibit or promote LO delivery, as well as the support and assistance received from fellow LO educators, senior staff and other educators in the school. In some cases, learners' disengagement or unruly behaviour during class was as a result of stressors in the environment like the use of substances or involvement in gang activities, while educators from PQ 5 schools felt that their learners were tired of hearing about HIV and AIDS, given their exposure to HIV prevention messaging since primary school. Overall, a common perception reported by staff, and shared by learners (Tucker et al. 2016a), was that many learners regard LO as a general knowledge subject and of less importance than other learning areas. Mr M acknowledges the persistent challenge in motivating learners to

submit their LO tasks:

> They don't consider [LO] as a subject that deserves their full attention. Even with that attitude, you'll find that if you'd let them, you won't even get those assignments that are compulsory for them to do, but because of the way I relate to them, they know that they'll have to submit it when they have to. So I get few problems. (Mr M: LO educator at PQ 1 school, 39 years, Umgungundlovu)

In addition to apathy and disengagement, there were accounts of actively disruptive learners who were crude and confrontational in their approach to talking about HIV and AIDS and sexuality. These learners were also known to ask personal questions about topics that 'put educators on the spot' during LO lessons. For untrained and inexperienced LO educators, these conversations were already flagged as problematic owing to concerns that teaching about sex may encourage learners to experiment in sexual activity. Male educators in the sample tended to deal with these challenges by implementing ground rules and enforcing strict discipline, while many female educators reverted to teaching the basics of HIV and AIDS and sex and sexuality:

> Now if you go deep into that [HIV and AIDS and sexuality topics] and there are those older boys who now are like, 'Yes ma'am, please tell us more, tell us more,' they make it personal now. They ask you, 'Ma'am, when did you start to engage in sex? What can be done, how can we do it?' Now, they digress, they take the lesson in a bad direction. That's why I feel that you mention it, you don't have to actually go deep and explain how it happens, but if you say that, 'Girls don't sleep with boys. Boys don't sleep with girls!' I think that is generally understood. (Mrs L: LO educator at PQ 4 school, 38 years, Umgungundlovu)

The extent to which other educators and senior staff were seen to support the LO programme and the status given to LO in the school had a direct influence on LO educators' enthusiasm, commitment and ability to deliver the LO curriculum. HoDs who provided good direction and support (i.e., curriculum-based support and social and emotional support) to LO educators, who taught LO themselves and were thus aware of the challenges and classroom experiences of their fellow LO educators, played a significant role in the delivery of LO in the school. However, the diminished status of LO within some school environments resulted in other educators pressurising LO educators to release their LO periods for the teaching of other subjects deemed more important:

> There's that stigma that life orientation is just a subject where we talk about everything, so it's an 'easy subject.' So, 'Can we have your period now? We can use them for something more important.'. Sometimes they don't understand the importance of it. (Mrs L: LO educator at PQ 4 school, 38 years, Umgungundlovu)

Mr D extends this argument about the perceived lesser value of LO relative to other learning areas by highlighting the broader politics underpinning LO assessment:

> If it was according to me, we could have been doing away with this subject because, as important as it is, it is not being recognised by the learners and, even us as the teachers, because the score for life orientation is not considered for admission at universities – that is another serious problem. So why

must we waste our time by allocating this thing in the timetable while it's not taking the learner anywhere? (Mr D: HoD at PQ 1 school, 32 years, Umgungungdlovu)

Educators and HoDs felt strongly that the inclusion of LO in universities' entrance requirements and external examinations at Grade 12 level would significantly improve the status and respect for LO in their schools. Considering the influence of ecological systems, a change in departmental policy may not only impact school-level decisions regarding teaching allocations for LO, but may also improve educators', learners' and caregivers' individual motivation and commitment to the subject area.

Community realities and parental disengagement

LO educators and HoDs participating in the study believed that topics covered in LO are particularly relevant in light of the harsh contextual realities faced by learners at their schools, including parental death and orphanhood, family dissolution due to migration, economic stress, depression and suicide, teenage pregnancy, HIV and AIDS, and substance use. In the following quote, Ms Z explains how the lack of resources and poor infrastructure within her school fails to inoculate learners from unsavoury influences in the community, which literally infiltrate the school boundaries.

> Drug abuse is escalating, teenage pregnancy, absenteeism, absconding. I should think this is mostly caused by our school not having a friendly environment for learners. There is nothing to do, there're no sports grounds. So if the child is not in the classroom, he is in the toilet smoking. If he's bored to do the book, we've got a fence, its cut every day. We put the new one – its cut, so there're holes, they go. It's not an environmentally friendly school. (Ms Z: LO educator/HOD at PQ 4 school, 55 years, Umgungundlovu)

There was a general belief by LO educators and HoDs that parents and caregivers should be responsible for communicating life skills, as well as sex and HIV education. However, it was acknowledged that parent–child communication is not succeeding at this level because of parental absence and cultural dynamics such as conservative family values. Schools are therefore the primary mechanism for learner development:

> If you look at everything that we teach . . . the parents don't have time to teach their kids these things. When I taught the Grade 9s we did a subject on personal well-being and positive development. We went right back to looking at manners and how many parents actually taught their kids to use the words 'please,' 'thank you,' 'excuse me,' 'pardon me,' to actually apologise when you need to and accept when you're wrong. And parents don't have the time. They're too busy, kids are just neglected and that's why we have a society that we have. (Mr S: LO educator at PQ 5 school, 29 years, Umgungungdlovu)

Few cases were reported where caregivers resisted or queried the sensitive nature of LO lesson content, primarily because of the family disengagement with schooling processes. Rather, several educators were concerned that what they taught in LO was being severely undermined by parents' poor monitoring and discipline and their failure to reinforce the information learnt in LO. As such,

cultural norms and values that conflicted with LO content could undo the potential benefit of LO in learners' lives. In the following quote, an LO educator explains how community norms about masculinity impeded his efforts to teach gender equality and safe sexual behaviour within LO lessons:

> In our culture if you have got a boy. . . . Some of the parents praise their boys, let's say your girlfriend is pregnant and some of the parents are happy, they said, 'Ah, you are a man.' So sometimes the environment makes it difficult for us. While we are discouraging it here [in LO] you can find that at the home they are encouraged to do this. (Mr Z: LO educator at PQ 3 school, 44 years, Umgungundlovu)

Although LO educators and HoDs acknowledged the role of these cultural values and norms in shaping uptake of LO messaging, these community-level factors were regarded as having a lesser impact on the educators' ability to deliver the LO programme as compared to issues emerging at the district, school and class levels.

Summary and recommendations

The perspectives shared by LO educators and HoDS in this study reveal several challenges impeding the optimal delivery of the LO programme. These include the diminished status of LO in the schooling system, lack of sufficient training for LO during pre-service and in-service training, a shortage of trained and experienced LO educators, the prioritisation of workload considerations in educator appointments for LO, insufficient subject advisor support, lack of teaching resources and materials, disruptive learner conduct and lack of support from fellow educators, inadequate parental involvement and contested cultural values.

The challenge of delivering LO in resource-constrained settings is significantly compounded in poor, rural schools where educators are less likely to be trained in LO, and experience difficulties in accessing additional informational sources and in-service training opportunities. The number of LO educators who attended regular in service training was low, even among educators teaching LO for several years. District departments need to better consolidate efforts to offer regular and relevant in-service opportunities that are accessible to all LO educators, particularly those working in rural schools. Furthermore, differences in the level of subject advisor support given to educators needs to be addressed to ensure no educators are disadvantaged. Educators who are new to the LO subject area should be observed and provided the requisite support from the subject advisor within the first term of their appointment.

The nature of the communities in which learners live, and the adversities they are exposed to, complicate the application of LO principles and information in their lives, while also placing demands on educators that extend well beyond their academic training. The extent of the vulnerability faced by learners, particularly in lower PQ schools, requires the support and guidance from not only LO educators but school faculty in general. Both pre- and in-service training needs to be cognisant of the contexts in which educators work, and ensure these educators are equipped and provided with the requisite skills and support. Continuing support, both by schools'

management teams and subject advisors, are necessary to ensure educators are able to meaningfully engage learners on sensitive topics, and also appropriately manage learner issues.

A common thread articulated through the study narratives was the need for a strategic response to be put in place to educate senior management and school staff about the importance of LO, and to validate its academic merits. This is provided for through the HIV and AIDS life skills conditional grant (DBE 2011), but implementation is key to maximise the effect of this policy response. Introducing external examinations for LO at matric level, making it count towards learners' university admissions, setting more challenging and comprehensive assessment tasks (at district and cluster level), putting in place highly trained, specialised and motivated LO educators, improving teacher content knowledge and pedagogical skills, and ensuring the requisite support from district level, including monitoring curriculum coverage, will go a long way towards improving the status of LO as a subject area as well as learners' engagement with LO – thereby maximising its potential to impact on key health outcomes, including reduced HIV infection and pregnancy rates.

Acknowledgement

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Teacher views of the implementation of the HIV/AIDS curriculum in Zimbabwean primary schools

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Abstract

Many countries privilege school-based educational interventions to leverage and arrest the spread of HIV/AIDS amongst youth. Schools are being strategically positioned to provide formal preventative education to youth, yet little is known about how teachers understand, implement and experience the implementation of HIV/AIDS curricula in school situations. How, for example, are teachers facilitated and assisted to provide HIV/AIDS support with regard to the implementation of relevant materials in various curricula? This paper draws on data from a qualitative case study conducted in Zimbabwe, which explored the teaching practices and experiences of three teachers at three primary schools. It teases out the implications of key findings in the study, namely, that teachers display a surprisingly superficial understanding and implementation of the HIV/AIDS curriculum even though many fully comprehend the requirements attached to implementing it. It is argued that while this may be attributed to constraints associated with how teachers understand what they need to know and do, personal and contextual factors often play a significant role in how teachers adapt the HIV/AIDS curriculum. The paper raises questions about what this may mean for further school-based educational interventions as a way of addressing and arresting the spread of HIV/AIDS amongst Zimbabwean youth.

Key Words: HIV/AIDS curriculum, teacher pedagogy, policy implementation, making sense of policy needs

Introduction

The 2000 World Education Conference held in Senegal acknowledged the debilitating effects of HIV/AIDS on Third World development imperatives of Education for All (EFA), citing HIV/AIDS-related teacher and pupil morbidity and mortality (UNAIDS 2009). At this conference, governments across the globe reaffirmed that schools should be the strategic and participative nerve centres for providing formal HIV/AIDS preventative education to youth. The challenge, however, is that research evidence in multiple settings reveals that teachers generally struggle with pupil (or learner)-centred HIV/AIDS curricula. In many contexts, it has been found that teachers struggle with implementing the various requirements tied to such curricula.

For example, Mugweni (2012) has shown that the implementation of the AIDS Action Programme curriculum in some secondary schools in Zimbabwe is acutely challenged, and has contributed to the general neglect of the topic within the country (Ministry of Education, Sport & Culture, MoESC 2009). He suggests that the struggle of implementation of the HIV/AIDS curriculum is even starker at the primary school level in Zimbabwe, with little known about the aetiological issues that primary school teachers perceive to be promoting or hindering their mediation of the HIV/AIDS curriculum. It is particularly the latter issue that this paper explores as a way of better understanding the related implications for further school-based educational interventions that seek to arrest the spread of HIV/AIDS amongst Zimbabwean youth.

In the study on which the paper is based, the phenomenological-adaptation approach to educational change and teacher cognition was used rather than the implementation fidelity educational (IFE) approach. It was felt that the latter approach wrongly treats teachers as mechanical instruments of educational change, presumed to faithfully enact policy in exact configurations of supposedly workable prototypes (Berman 1981). The study avers that teachers invariably engage in cognitive sense-making of curriculum policies and, therefore, often mutate curriculum messages in ways they think necessary to teach their pupils apropos their learning needs (Berman 1981). The phenomenological-adaptation approach allows for personal and subjective interpretations of teacher adaptations of curricula in the context of personal attributes in relation to curricula, and contextual factors exogenous to them.

Zimbabwe's primary school HIV/AIDS curriculum

However, to understand how teachers make sense of and adapt curricula it is important to know what they think a programme like the HIV/AIDS curriculum in Zimbabwean primary schools encompasses, and to have a firm sense of what they understand its various elements, guidelines and specifications to be.

Pedagogically, the main challenges that teachers in Zimbabwe encounter with the HIV/AIDS curriculum are connected to (1) the ways in which the curriculum content is broken up into themes, life skills and HIV/AIDS information, and (2) the social, interactive participatory methods that are used to convey materials to pupils.

In the first instance, in keeping with broader pupil-centred teaching approaches, teachers are expected to plan their teaching in ways that explicitly highlight overarching themes and topic content for particular weeks. These themes include items such as relationships, human growth and development, and health (MoESC 2003). In so doing, teachers are expected to sequence the discussion of ideas across grades, appropriate to the ages of pupils. Thus, for example, subsumed under the broad theme of human growth and development, the insertion of sexuality education is meant to assist pupils to engage with protective behaviours. It is meant to conscientise young pupils about the bodily changes that go with puberty, and the challenges and benefits of abstaining from sex while still in school (MoESC 2009). The approach is to, initially, adopt a negative approach in the curriculum to the discussion of sex and sexuality with young pupils, including the issue of condoms (in keeping with recommendations by the United Nations Educational, Scientific and Cultural Organisation, UNESCO & United Nations Population Fund, NFPA 2012), and then, in later grades, to follow a more direct approach to discussing sex as a natural and mature way of adults showing care and affection.

In the second instance, teachers are encouraged to convey the content of curricula through participatory teaching methods such as role-play, playing devil's advocate and using the Futures Wheel as ways of achieving lesson objectives. It is argued that these methods allow for the collective identification and solution of problems, and experientially involve pupils in self-exploration, discovery, individual internalisation and personalisation of HIV/AIDS-related issues (MoESC 2009; Okore 2009).

These two pedagogical approaches or decisions both emphasise equipping growing pupils, holistically, with life skills and information that allow them to cope in a world bedevilled with the pandemic (MoESC 2003; Okore 2009). Adopting these pedagogical approaches, it is argued, discourages pupils from exclusively intellectualising the issue and, according to UNAIDS (2009), empowers teachers to facilitate both content mastery and life skills development.

Challenges highlighted in the literature about HIV/AIDS curriculum content and teaching approaches

In noting the two preferred pedagogical decisions above, international literature on HIV/AIDS curricula highlights a number of factors, attitudes and challenges that hinder straightforward operationalisation, including the extent to which the personal lives and beliefs of teachers and pupils intersect with the abilities and competencies of various school actors in actualising HIV/AIDS school curricula.

Teacher preparation in the HIV/AIDS curriculum

Notably, what most frustrates intended teacher interventions like those related to HIV/AIDS is that teachers are often not adequately prepared with pedagogical knowledge and skills on the matter at the pre-service and in-service teacher preparation levels. A number of studies have shown that inadequate and inappropriate teacher preparation resonates across most sub-Saharan and SADC

countries (Kelly 2007; Mugimu & Nabbada 2009), with the lack of teacher capacity being a serious impediment in the delivery of relevant HIV/AIDS preventative education programmes (UNESCO 2005; Theron 2008; UNAIDS 2009). The consequence is that HIV/AIDS education programmes are often superficially implemented in most schools.

For Zimbabwe, Mugweni's (2012) study is important in that it highlights the enormous difficulties that teachers experience vis-à-vis inadequate content knowledge and inappropriate pedagogical skills when teaching the secondary school HIV/AIDS curriculum. Mupa's (2012) quality assurance work on HIV/AIDS education programmes in various primary schools in Zimbabwe, on the other hand, shows that where teachers possess knowledge of this curriculum they generally enact it well.

Teachers' personal attitudes and attributes

Further factors that influence how the HIV/AIDS curriculum is generally addressed in schools are tied to the abilities, capacities and comfort levels of teachers when teaching these materials. Lesko et al. (2010) note in their study in elementary schools in the USA that many teachers are not always equipped to use teaching strategies such as role playing, problem-solving and small group discussions, and often are unprepared to teach HIV/AIDS topics that cover social, emotional and societal issues. Many teachers also dislike teaching the materials and feel deeply uncomfortable when asked to do so. This is a deep-seated problem worldwide, with Helleve et al. (2009) asserting in their study in the Netherlands that a direct link can be posited between teachers' attitudes towards the HIV/AIDS education programme and their commitment to teaching the programme. Where teachers display negative attitudes towards the HIV/AIDS curriculum they are inevitably less committed towards teaching the programmes. These negative attitudes need not be prejudicial or discriminatory, but can derive from an asserted lack of resources, the focus and tone of the syllabi, and institutional support in teaching the curriculum (Mugweni 2012).

Teacher capacity

Where teachers have sound knowledge and the necessary skills to teach HIV/AIDS educational programmes, these tend to become meaningful interventions (van Rooyen & van den Berg 2009). However, curriculum interventions struggle to get traction in schools when teachers don't possess the content knowledge and psychosocial, moral and facilitating skills to fulfil their responsibilities. Such interventions are further inhibited when there are not enough teaching and learning resources in schools. Buthelezi (2008) asserts that in many Third World schools, the paucity of teaching and learning resources serve as a serious impediment to successful implementation of school HIV/AIDS preventative programmes.

In this regard, it is notable that the levels of pupil maturity and mental readiness in different schools have a huge impact on the levels of teacher confidence or capacities to discuss issues related to sexuality and the HIV/AIDS pandemic. Ironically, it was found in many cases that the younger the pupils the more the confident teachers, and that teachers seemed to be less confident to openly discuss issues with older pupils (Helleve et al. 2009).

Other factors seen to influence teacher confidence and capacity are negative pupil attitudes towards the HIV/AIDS curriculum, their readiness and maturity to engage with associated issues, pupil ability to communicate in English or in the language of teaching and learning (as was found in South Africa), and the kinds of teacher-pupil communication channels that are in operation in different schools (Helleve et al. 2009; Mupa 2012).

Contextual challenges that influence how teachers teach HIV/AIDS in schools

The key challenge in most contexts lies in how what and how teachers teach is shaped by the broader contextual conditions under which they work. In most cases, political, social and economic local arenas account for how teachers encounter and mediate education policy and associated programmes, and the kind of curriculum conditions in which HIV/AIDS programmes are implemented. Kincheloe (2008) reminds us that teachers operate in cultural communities where particular norms, values, attitudes and belief practices are prioritised.

Thus, teachers struggle to teach particular content, or attempt certain pedagogies, in situations where these are seen to conflict with the cultural or religious practices, norms and values of particular communities (Wood & Hillman 2008). In many instances, as Baxen and Breidlid (2009) note, the whole topic of HIV/AIDS as a knowledge area is hotly contested – which often leads to a serious collision of ideas and attitudes.

Teachers also struggle with working through the linguistic, historical and cultural connotations of what they seek to share when teaching the HIV/AIDS curriculum. Bhana (2009) suggests that the ways in which teachers in South Africa understand the HIV/AIDS curriculum policy historically, socially and culturally are reference-points for what is understood to be 'acceptable' and 'unacceptable' in their classrooms. It is these sociological norms that influence what and how pupils are allowed to discuss and speak about in class.

This is also, in no small measure, shaped by what parents are willing to allow their children to be taught in class. In research in schools in the USA, Lesko et al. (2010) observed that many teachers experience parental resistance and backlash for using sexuality-related terms. Indeed, in some African countries like South Africa, teachers are often threatened with censure or dismissal if they discuss taboo topics and use terminologies that parents consider unacceptable (Helleve et al. 2009). Such attitudes often influence the kinds of pedagogical thinking that goes into teaching the HIV/AIDS curricula.

The teaching and knowledge transfer of the HIV/AIDS curriculum in three schools in Zimbabwe

Having noted the above challenges and constraints, the next section of the paper explores how teachers understand, implement and experience the implementation of HIV/AIDS curricula in specific school situations. It questions the ways in which teachers in particular settings have been positioned, supported, facilitated and assisted to teach the HIV/AIDS curriculum. Specifically, the paper focuses on the views of three teachers in three different school settings in Zimbabwe and

asks to what extent personal and contextual factors influence how the three teachers implement the HIV/AIDS curriculum in their classrooms.

The research data used

The data used in the paper was captured during a triple-sited qualitative study that included three purposively selected Grade 6 class teachers (n = 3) drawn from three purposively selected Zimbabwean schools – two schools in Gweru Urban school district, and one school in Lower Gweru Rural school district – (n = 3).

Data was collated via document analysis, lesson observations and semi-structured interviews. The aim was to glean from lesson plans how teachers conceptualised and codified the curriculum, and then to analyse these conceptualisations during five lesson observations in each of the three teachers' classrooms over three weeks. This was accompanied by semi-structured interviews with the teachers to provide a more nuanced understanding of their actual teaching practices and experiences with the curriculum.

Part of the goal was to determine the frequency of the key curriculum features that teachers emphasised or under-represented in their planning. These frequencies were captured as numerical codes on tables of information (Tables 1, 2 and 3 below). In each case, where one theme or one topic was seen for each week it was coded as '1.' Where a teaching method was observed at least thrice during the weekly observation and lesson plan, it was encircled, coded and entered as '3.' Similarly, if no life skill or two life skills appeared in the lesson plan in one weekly lesson, they were coded and recorded as '0' and '2,' respectively. The data was further triangulated with the field notes and audiotape recordings of the interviews (Creswell 2007; Leedy & Ormrod 2010). In all cases, anonymity was assured via the use of fictitious names and a primary concern to protect the privacy and confidentiality of the three teachers and schools (Drew, Hardman & Hosp 2008; Guthrie 2010). Formal permissions from the various authorities and heads were secured, as well as from the university via which the study was conducted.

Graphic representation and identification of some key themes

As this paper shifts to description and discussion of what three teachers (Stella, Ellen and Charles) expressed about their understanding and adaptation of the HIV/AIDS curriculum in Zimbabwe, and its challenges to their teaching practices, the sub-section below provides a graphic illustration and codification (Tables 1, 2, 3) of the intended classroom practices and plans of the three teachers.

These provide a backdrop for a discussion about how (1) the teaching approaches or orientations of the three teachers intersected with (2) the kinds of techniques, skills and knowledgeability that they needed, (3) the themes and methods each of them privileged when they taught, and (4) the different contexts and influences that shaped and informed the ways in which they implemented the curriculum and transferred knowledge of HIV/AIDS to pupils. While the graphs and subsequent engagement and analysis of findings show that the three teachers sometimes adopted different approaches, orientations and methods in their different classroom settings, a key finding in the overall study was that there were no normative or straightforward differences between their

approaches, nor was there a clearly evident best-practice approach that emerged from any one classroom setting.

Table 1: Data on Stella's symbolic representation of the AIDS curriculum

	Week											
Item and frequency/week	1	2	3	4	5	6	7	8	9	10	11	12
Theme	0	0	0	0	0	0	0	0	0	0	0	0
Topic and Content	1	1	1	1	1	1	1	1	1	1	1	1
Teaching Methods												
Discussion	3	1	1	0	2	1	1	0	1	1	1	1
Question and Answer	1	1	1	1	1	1	1	1	1	0	0	0
Role Play	0	0	0	0	0	0	0	0	0	0	0	0
Drama	0	0	0	0	0	0	0	0	0	0	1	1
Picture Codes	0	0	0	0	0	0	0	0	0	0	0	0
Devil's Advocate	0	0	0	0	0	0	0	0	0	0	0	0
Brainstorming	0	0	0	0	0	0	0	0	0	0	0	0
Explanation	0	0	0	1	1	0	0	2	1	1	0	1
Demonstration	0	0	0	0	0	0	0	0	0	0	0	0
Case Studies	0	0	0	0	0	0	0	0	0	0	0	0
Values Clarification	0	0	0	0	0	0	0	0	0	0	0	0
Futures Wheel	0	0	0	0	0	0	0	0	0	0	0	0
Textbook	1	0	0	1	0	1	0	1	0	0	0	0
Life Skills												
Decision Making	0	0	0	0	0	0	0	0	0	0	0	0
Self-awareness	0	0	0	0	0	0	0	0	0	0	0	0
Communication	0	0	0	0	0	0	0	0	0	0	0	0
Negotiation	0	0	0	0	0	0	0	0	0	0	0	0
Critical thinking	0	0	0	0	0	0	0	0	0	0	0	0

Table 2: Data on Ellen's symbolic representation of the curriculum

	Week											
Item and frequency/week	1	2	3	4	5	6	7	8	9	10	11	12
Theme	1	1	1	1	1	1	1	1	1	1	1	0
Topic and Concept(s)	1	1	1	1	1	1	1	1	1	1	1	0
Methods												
Discussion	1	1	1	0	1	3	2	3	2	3	2	0
Question and Answer	0	0	0	0	0	0	0	0	0	0	0	0
Role Play	1	0	0	1	1	0	0	0	0	0	1	0
Drama	0	0	0	1	0	0	0	0	0	0	0	0
Picture Codes	0	0	0	0	1	0	0	0	0	0	0	0
Devil's Advocate	0	0	0	0	0	0	0	0	0	0	0	0
Brainstorming	0	0	0	0	0	0	0	0	0	0	0	0
Explanation	0	0	0	0	0	0	0	0	1	0	0	0
Demonstration	0	0	0	0	0	0	0	0	0	0	0	0
Case Studies	0	0	0	0	0	0	0	0	0	0	0	0
Values Clarification	0	0	0	0	0	0	0	0	0	0	0	0
Futures Wheel	0	0	0	0	0	0	0	0	0	0	0	0
Song	0	0	0	0	0	0	0	0	0	0	0	0
Debate	0	1	1	0	0	0	0	0	0	0	0	0
Text book	0	0	0	0	0	0	0	0	0	0	0	0
Telling/story narration	0	0	0	0	0	0	0	0	0	0	0	0
Life skills												
Decision Making	0	0	0	0	0	0	0	0	0	0	0	0
Self-awareness	0	0	0	0	0	0	0	0	0	0	0	0
Communication	0	0	0	0	0	0	0	0	0	0	0	0
Negotiation	0	0	0	0	0	0	0	0	0	0	0	0
Critical thinking	0	0	0	0	0	0	0	0	0	0	0	0

Table 3: Data on Charles's symbolic representation of the curriculum

Item and frequency/week	Week 1	2	3	4	5	6	7	8	9	10	11	12
Theme	0	0	0	0	0	0	0	0	0	0	0	0
Topic and Concept(s)	1	1	1	1	1	1	1	1	1	1	1	0
Methods												
Discussion	1	0	1	1	1	1	0	1	1	0	0	0
Question and Answer	0	0	0	0	0	0	0	0	0	0	0	0
Role Play	1	1	1	1	1	1	0	1	1	1	0	0
Drama	0	0	0	0	0	0	0	1	0	0	0	0
Picture Codes	0	0	0	0	0	0	0	0	0	0	0	0
Devil's Advocate	0	0	0	0	0	0	0	0	0	0	0	0
Brainstorming	0	0	1	1	0	0	0	1	1	0	0	0
Explanation	1	1	0	0	1	0	0	0	0	1	0	0
Demonstration	0	0	0	0	0	0	0	0	0	0	0	0
Case Studies	0	2	0	4	0	0	0	0	0	1	0	0
Values Clarification	0	0	0	0	0	0	0	0	0	0	0	0
Futures Wheel	0	0	0	0	0	0	0	0	0	0	0	0
Song	0	0	0	0	0	0	0	0	0	0	0	0
Dialogues	0	1	0	0	1	1	0	0	0	0	0	0
Debate	0	0	0	0	0	0	0	0	0	0	0	0
Text book	0	0	0	0	0	0	0	0	0	0	0	0
Telling/story narration	0	0	0	0	0	0	0	0	0	0	0	0
Life skills												
Decision Making	0	0	0	0	0	0	0	0	0	0	0	0
Self-awareness	0	0	0	0	0	0	0	0	0	0	0	0
Communication	0	0	0	0	0	0	0	0	0	0	0	0
Negotiation	0	0	0	0	0	0	0	0	0	0	0	0
Critical thinking	0	0	0	0	0	0	0	0	0	0	0	0

Teacher pedagogical approaches

Each of the three teachers who partook in the study showed different degrees of preference in their planning for certain teaching approaches and styles. These planning approaches, it is argued, led to the HIV/AIDS curriculum being shared in very particular and different ways in the various settings. For example, Stella's planning and teaching reflected a more conventional, traditional approach that would have been applied to any subject curriculum she taught, while Ellen's planning and teaching showed greater pupil-centred interaction that was, nevertheless, still oriented towards transmission teaching. Charles' planning and teaching, on the other hand, seemed to steer towards a mix of cognitivist and constructivist, pupil-centred and interactive approaches.

For Stella, it was important to treat the teaching of HIV/AIDS as any other academic and pedagogical challenge and activity. She asserted in her interviews that she found working with textbooks, engaging with key issues through written work, factual learning and question-and-answer processes fundamental to good teaching. As such, she specifically planned for ways that prioritised transmission. For Stella, 'imparting knowledge to pupils happened through asking questions, and they'll be answering, and also I do the imparting of knowledge by telling my pupil facts about HIV/AIDS.' Her interest was not in getting pupils to locate themes under which HIV/AIDS would be subsumed, or developing participatory ways by which they could understand the content, nor highlighting the specific life skills that pupils should master. Rather, she was fully inclined towards knowledge impartation and written tasks. This was

confirmed during lesson observations where Stella seemed preoccupied with didactic learning and the sharing of factual information through chalk-talk and, minimally, through questions and answers. We return to some reasons for this position later in the paper – tied to Stella's preference for individual development around HIV/AIDS and her predisposition to pupils providing 'correct responses' even where there were multiple interpretations possible.

Ellen was also prone to a transmission orientation. While her curriculum planning included pupil-centred and social interactive approaches, lesson observation confirmed that her primary teaching mechanism was transmission. She too approached the teaching of HIV/AIDS as a curriculum challenge that needed to fit with, and accommodate, her everyday teaching practices, but acknowledged the importance of discussion, role-play, picture-codes, drama and other participatory methods as potentially useful pedagogies to teach the HIV/AIDS curriculum. Noting that, 'eh-eh, these participatory methods are effective methods of teaching to help students understand better,' Ellen was guarded, however, about stepping too far outside of her normal practices and teaching, or focusing on life skills. She noted in interviews that she did not regard the latter as her educational responsibility, and argued that there were certain 'axiomatic truths' that needed to be shared via transmission learning.

Charles was as partial to transmission teaching as were Stella and Ellen. However, in his planning, and from lesson observation, Charles demonstrated a greater predilection to pupil-centred, participatory pedagogies that included role-playing, discussion, dialogue, brainstorming, writing letters and using song and case studies. For him, it was 'very important to include as many participatory activities as possible.' This reflected less inclination towards the processing of factual knowledge and more interest in developing key life skills. During lesson observations, Charles' practices demonstrated that, while he remained faithful to the reproduction of knowledge in both planning and practice, he was willing to expand his pedagogical techniques to become more pupil-centred and constructivist. This was confirmed in interviews where Charles noted that while chalk-talk remained important to him to set up and confirm key content issues, he found participatory methods useful in embedding key ideas into how students understood everyday life. This was an important deviation from the practices of Stella and Ellen who struggled to think of the content of the HIV/AIDS curriculum differently to other knowledge forms that they worked with.

This is not to suggest that Charles' planning or teaching practices were more appropriate than those of Stella or Ellen. In his planning, Charles was very partial to pedagogies of cognition and repetition. However, discussions revealed that with some prompting and minimal further professional development some teachers can be helped to shift towards more participatory methods in their practices when teaching the HIV/AIDS curriculum.

How content and teaching contexts intersect in teaching the HIV/AIDS curriculum

It was also apparent in the study that how teachers approached the curriculum in their planning was not only tied to their pedagogical practice preferences but also to (1) their knowledge of the curriculum content and the skills tied to that, (2) their professional development and the ways that

pre-service training had (un)prepared them for teaching modules like HIV/AIDS, (3) their struggle with what to teach to which pupil age group and in which context, and (4) the pressures put on them by parents and their belief systems on how they implemented the curriculum and transferred knowledge of HIV/AIDS to pupils.

Firstly, from the planning schedules and from later interviews with the teachers, it was found that the three teachers knew very little about how to teach topics like HIV/AIDS or the required content that needed to be shared. Their choice of known participatory teaching methods such as role play, discussion and using pictures was tied to the knowledge and skills that they felt they possessed to use these methods, and their exposure to them during their pre-service teacher preparation. They were indisposed to use methods that they were unsure about and that would undermine 'professional delivery.' Each of the three teachers voiced concern about their knowledge-base of HIV/AIDS, and that they did not have appropriate materials and resources to assist them, and noted that this generated very negative feelings and attitudes when asked to enact within the curriculum. Stella exclaimed: 'If they don't supply us with eh- resources like syllabuses, teachers' guides and textbooks, what can I do as a teacher?'

Secondly, Ellen observed during interviews that the lack of preparation was not simply an issue for relevant education authorities but also one that was tied to teacher training institutions and the ways in which they embedded the teaching of the HIV/AIDS curriculum in their modules. She bemoaned the tendency to privilege conventional subject curricula in pre-preparation programmes, and the lack of resources (syllabus materials, textbooks and teacher guides) at these institutions to help student teachers untangle the difficulties tied to implementing the HIV/AIDS curriculum. Charles, similarly, noted that the few and irregular staff development sessions held in school districts were usually ineffective and equipped teachers with piecemeal, incoherent, and unworkable content knowledge and pedagogies. Professional development was, therefore, lacking to help prepare teachers to teach the HIV/AIDS curriculum.

Thirdly, teachers expressed concern about the maturity of their pupils, and their attitudes to the HIV/AIDS curriculum. They noted that this made it difficult to and plan and prepare classes for pupils, and to work through the kinds of issues they needed to address and how they could best be engaged in classroom situations. This was made even more problematic when pupils couldn't easily communicate in the English language, and were passive and non-responsive during classroom discussions. Ellen observed, for example, that pupil immaturity for 'certain topics' was an influential factor in her choice of topics in the HIV/AIDS curriculum. She felt that young pupils could only discuss certain topics openly, while more mature pupils could tackle a much wider range and topics suitable to their age.

Fourthly, all three teachers reflected in their planning (and during interviews) that parent belief systems and senior school management indifference played a key role in how they planned the teaching of the HIV/AIDS curriculum. Charles argued that broader negative community attitudes to HIV/AIDS programmes and curricula served as key barriers to how teachers thought about their teaching and its outcomes. He claimed there was no point in being innovative and creative in

sharing knowledge about HIV/AIDS when senior policy makers, principals and other teachers undermined such efforts and even challenged teachers on what they did in class.

Charles noted that it was also problematic to ask teachers to teach about HIV/AIDS matters when they themselves were uncomfortable to openly discuss sexuality or use sensitive sexual or what they regarded as vulgar terms. While Charles was comfortable opening up spaces in his classes, he observed that teacher discomfort could not be solely explained as conservative or biased thinking but, rather, was often tied to cultural taboos and norms – many of which needed to be respected and observed. Ellen explained in this regard that she was uncomfortable to use terms such as 'penis' in class with pupils. She noted that such uncomfortable instances challenged her planning because they often led to rowdy and disobedient classes. For her to open up discussions in such ways was, she noted, to immediately undermine her own authority in class.

Implications of such favoured pedagogies and implementation challenges

International reports on effective HIV/AIDS curricula suggest that successful programmes need teachers to strike a healthy balance between knowledge impartation and life skills development, and that interactive participatory methods are the best means to achieve this (MoESC 2003; MoESC 2009; UNAIDS 2009). Many reports claim that pupil-centred participatory approaches better involve pupils in self-exploration, personal discovery, and individual internalisation and personalisation of AIDS-related issues, and claim that using a wide range of participatory methods has a much better influence on pupil and individual behaviour (MoESC 2009; Okore 2009; UNAIDS 2009).

Yet, all three teachers in the study remained particularly predisposed to a didactic, transmission approach. They did not easily recognise the need for alternate approaches or pedagogies in the teaching of the HIV/AIDS curriculum, and firmly believed that impartation and mastery of content (using traditional, teacher-centred practices followed for most mainstream subject curricula) should remain the more privileged way to share knowledge.

Even then, as in Ellen's and Charles' cases, where they tried to be more pupil-centred when working with the HIV/AIDS curriculum, they struggled to process how to better engage with or understand the necessary life skills that needed to be an outcome of their classes (nor did they possess the pedagogic techniques to do so in their classrooms). This meant that, for an outside social environment that was very vulnerable to the effects of the HIV/AIDS pandemic, the three teachers were unable to model the kinds of talk activities or develop the required life skills in class that pupils needed to address many of their immediate life challenges (MoESC 2009; Okore 2009; UNAIDS 2009).

Charles, however, noticeably sought to mutate the curriculum in ways that interwove participatory and non-participatory methods as a way of allowing pupils to collaboratively construct the knowledge forms being generated. He evidently recognised the value of straddling competing pedagogies and helping pupils learn experientially through discursive activities generated in socially interactive settings (MoESC 2003; Okore 2009). This revealed that, even in mainly

transmission-oriented spaces, with a little innovation and some shift in pedagogic practice teachers could contribute to the imparting of crucial life skills.

On the other hand, by not recognising the full value of participatory approaches and the need to discernibly plan activities that fulfilled the expectations of the HIV/AIDS curriculum, Charles' various innovations could not avoid a variety of insensitivities, stigmatisations and forms of discrimination in his classes. Through poor planning and a lack of visible reorientation he could not, for example, avoid language slippages such as 'polygamists' and 'people infected by HIV/AIDS' rearing their head during role-plays, nor facilitate or create positive environments where pupils shared their fears, frustrations and insecurities. This denied pupils the opportunity to form broad ideas about various topics and to be in safe spaces to engage with sensitive concerns.

In the latter respect, the focus on the processing and reproduction of content knowledge in the classrooms of the three teachers often had deeply disempowering and countervailing effects. Rather than respecting, without prejudice, opinions and different pieces of knowledge that pupils brought into lessons (MoESC 2009), the arbitrary presentation of content knowledge as axiomatic truth served to, instead, legitimise particular ways of thinking and traditional value systems, and to undermine the rhetoric flavour and spirit of the constructivist text that informed the HIV/AIDS curriculum. It also discouraged pupils from engaging in critical dialogue and thinking and retarded the development of crucial life skills.

As such, by deferring to the comfort of transmission teaching and privileging the transfer of content knowledge, the three teachers ensured that key forms of learning and knowledge tied to the HIV/AIDS curriculum could neither be facilitated nor moderated (UNESCO 2005; MoESC 2009). Through preferred teaching approaches and pedagogies, the three teachers introduced conceptual and instructional constraints that undermined the overall intentions of the constructivist-oriented HIV/AIDS curriculum. This posed grave implications for the implementation of the curriculum in other schools across the different school districts of Zimbabwe, with many teachers still favouring transmission-oriented teaching and teacher-centred approaches. A key finding in the study was that professional development programmes need to target the extent to which such traditional approaches and classroom practices prejudice pupil learning, and contradict the main aims and anticipated (life skills) outcomes of the HIV/AIDS curriculum, and that shifts in how teachers are prepared are fundamental to changes in classroom learning in the future.

In that respect, other studies (Kelly 2007; Mugimu & Nabbada 2009) confirm that teacher inadequacy in relation to content knowledge and pedagogic skill often hinder the successful implementation of school HIV/AIDS educational programmes, and that this can be traced to a definitive lack of professional capacity (Theron 2008). In South African schools, for example, van Rooyen and van den Berg (2009) showed that where teachers possessed or acquired better working knowledge and pedagogic skills, they reported having greater motivation and confidence to teach HIV/AIDS programmes. Van Rooyen and van den Berg (2009) found that ill-equipped teachers invariably could not mediate or navigate the preventative elements of HIV/AIDS curricula, and often mutated the curricula in ways that undermined their overall goals.

Neutralising attitudes and inhibiting human behaviours

In terms of being ill-equipped, teachers in the study noted that they simply were not properly capacitated with the forms of knowledge, necessary syllabi, required supervision, or resources and materials to bring about meaningful change in their classrooms (UNAIDS 2009). They observed that in such situations they resorted to adapting and translating their practices and pedagogies in ways that 'got the job done' but that these were often not conceptually appropriate for the task at hand (Buthelezi 2008; Theron 2008; UNAIDS 2009; van Rooyen & van den Berg 2009).

However, a key challenge in debates about the HIV/AIDS curriculum was also not always about whether teachers were properly equipped to teach the curriculum, but whether they felt comfortable sharing the knowledge. Studies by Lesko et al. (2010) in South African schools and Mugweni (2012) in Zimbabwean schools note that some teachers express a clear dislike for the HIV/AIDS curriculum. Similar sentiments were expressed in the study on which this paper is based.

Notably, such attitudes didn't operate within strict binaries. For example, while Ellen clearly struggled with introducing participatory methods into her classroom, she was quite positive about the curriculum because of her personal experiences with the pandemic. On the other hand, while Charles was open to using various techniques and approaches to facilitate learning in his classroom, he was quite dismissive about the goals of the HIV/AIDS curriculum. Charles felt that the curriculum and its specific needs simply added a further burden to his already large workload, and did not address fundamental social issues and cultural concerns.

In both instances, the teachers noted that it did not matter whether they were predisposed towards the curriculum or its goals, or whether they actively supported the required techniques and methods that needed to be introduced into their classroom practices. Rather, the teachers asserted that their endeavours and efforts were meaningless unless educational change leaders (policy makers, principals and districts) showed greater commitment, and offered teachers better support. They asked: 'Why should teachers bother themselves with the HIV/AIDS curriculum when those who should be leading implementation and providing instances of exemplary practice are, generally, indifferent?'

During interviews, the three teachers bemoaned the policy maker indifference and neglect shown towards the effective implementation of the HIV/AIDS curriculum, both in terms of the necessary resources and materials and in the support provided to teachers to teach the curriculum. They observed that senior policy makers and management people did not understand the challenges tied to teaching and implementing the curriculum, and never visited schools to witness these struggles or offer support to teachers.

Such attitudes, the teachers argued, could also be extended to include pupils and other stakeholders like parents. It was particularly troubling, according to Stella, when pupils who had contracted HIV/AIDS displayed negative attitudes towards the curriculum and adopted passive and disinterested stances. This made teachers despondent and unconvinced that their efforts and

greater commitment would make meaningful differences to pupil development. Ellen suggested that, to address this despondency, the maturity of pupils needed to be approached as a key contextual variable in classroom planning and curriculum development.

The above findings concurred with the findings of Helleve et al.'s study (2009) in some South African schools that linked pupil mental maturity and readiness to their active participation in HIV/AIDS classes, and which revealed that pupil lingual deficiency in the English language created challenging teacher-pupil communication problems during HIV/AIDS lessons. In both studies, it was found that when teachers saw that associated actors were not completely willing to contribute, or to do so in telling ways, they tended to revert to older and more comfortable pedagogies and practices. This had damning consequences for other pupils who needed to know more about HIV/AIDS and the required life skills as they were growing up.

In this regard, Baxen and Breidlid (2009) suggest that because HIV/AIDS and discussions about sexuality represent such widely contested knowledge areas (which inevitably invoke collisions of ideas and emotions) the fallback in classrooms is often to sanitise the attached discourses and to try to cushion pupils from exposure to key elements of HIV/AIDS debates. This was particularly so with regard to sexuality and sexual activity, and provided teachers with a variety of dilemmas and paradoxes when they prepared lessons and engaged with the HIV/AIDS curriculum.

With regard to parents and their broader sociocultural environments, teachers noted that they had to be constantly sensitive to the kinds of language that they used in their classrooms, and to what was considered acceptable and unacceptable to discuss with pupils during HIV/AIDS lessons (Bhana 2009). They observed that they struggled to articulate key curriculum policy messages that involved sexuality in the face of, often virulent, parental backlashes and that this was often manifested in their selective teaching of content. The three teachers intimated that they felt the need to be responsive to the deeply embedded cultural norms and values of the communities in which they served (Kincheloe 2008) and, thus, often avoided using explicit sexual terms that might contravene the community's cultural sense of propriety.

Conclusion

Engagement with the views, attitudes and practices of the three Zimbabwean teachers, the study revealed that teacher implementation of the primary school HIV/AIDS curriculum in Zimbabwe is arguably influenced by a variety of personal and subjective interpretations and adaptations. As cognitive sense makers, the teachers conceptualise policy and respond to it in the context of personal and exogenous antecedents and in accordance with various local prescriptions. This invariably leads to a superficial enactment of the curriculum.

We argue that, while it may be easy to criticise teachers for privileging their personal attributes and (often) masking their lack of knowledge and inadequate teacher preparation, associated pedagogies and approaches to the HIV/AIDS curriculum are a weakness and obligation that is not theirs alone. Multiple stakeholders and partners need to take responsibility for the clear

misalignment and gap between curriculum policy and forms, and the realities of their practical classroom implementation.

A bigger challenge that confronts the education sector, however, is that current curriculum manifestations and practices seem to be creating further conceptual and operational carnage in schools. This is being achieved through diluting and weakening the very elements in the curriculum and its teaching that are central to what pupils need vis-à-vis required life skills. Regardless of whether policy or policy makers deem the topic (and curriculum) important for pupil development, the inability or incapacity of teachers to provide meaningful engagement with the HIV/AIDS curriculum will lead to a negligible uptake of key lessons and insights in the curriculum.

Teachers will continue to struggle with implementing the HIV/AIDS curriculum in Zimbabwe unless greater emphasis is placed on them better understanding, accepting and internalising the underlying philosophies and pedagogies associated with that curriculum; and unless greater effort is made to infuse general societal and cultural concerns in the ways the curriculum is approached. Given that HIV/AIDS is a great societal concern and challenge, there is need for more transparent, amicable, flexible and accommodating settings to debate and discuss the kinds of understandings that are crucial for pupils to engage meaningfully with their everyday lives.

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Decolonising history of education in South African teacher education

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Abstract

The #Rhodesmustfall and #Feesmustfall campaigns in higher education institutions in South Africa during 2015 and 2016 brought into sharp focus questions about the decolonisation of the curriculum. In this debate, history plays an important role. This article examines what is taught from the perspective of interpretive traditions that have been established over time in South African history. It does so through an analysis of interviews conducted with lecturers in history of education as well as an analysis of curricula via textbooks. The work of Sebastian Conrad on Eurocentrism and Achille Mbembe on the coloniality of knowledge production processes informs the analysis. Here, the emphasis is on the conceptualisation of agency and the entanglement of knowledge production processes with colonialism. The definition of colonialism recognises continuities in power relations and representations between past and present, colonial and post-colonial periods. Interviews highlight the negative impact on quality of massification linked to inadequate budgets for staffing and the low status of both education and history. Analysis of history of education sections in new textbooks produced since 2000 show that they reproduce, with minor modifications, a Eurocentric orthodoxy focused on an unproblematised history of the evolution of public schooling. On the whole, lecturers either do not use them or modify them, and African agency in education struggles is a strong theme in what is taught. Whereas the textbooks largely use an older historiography, many lecturers draw on more recent historiographies. A problem across the board is the isolation however from the mainstream discipline of history and changes in it.

Keywords: decolonisation; history of South African education; teacher education

Background and introduction

The #Rhodesmustfall and #Feesmustfall student campaigns of 2015 and 2016 in South Africa brought into sharp focus the centrality of history to the debate about the decolonisation of the university curriculum. At the same time, pressure from the majority South African Democratic Teachers Union led to the appointment of a ministerial committee to establish whether history should be made compulsory for all in senior secondary schooling, where it is currently a choice, or not. This renewed focus on history raises questions about the history curriculum in teacher education, and whether it can be considered decolonised or not. This article addresses this question. It analyses interviews conducted in 2016/7 with history of education lecturers in 16 of South Africa's 25 universities and universities of technology, their course outlines and the textbooks produced for, and used in, history of education in South African teacher education programmes.

While there has been some research into the nature of the history curriculum in postapartheid South Africa, the nature of history of education in teacher training has not received a great deal of attention. In order to understand how it has changed, it is important to understand its close relationship to trends in the United States and United Kingdom. Here, the most important account is Peter Randall's (1988) survey of history of education in South African universities, conducted on the eve of the transition to democracy. Randall's account of the relationship of history of education in South Africa to developments in 20th century USA and UK highlights South Africans' uncritical adoption and mimicry of the trends, both in teacher education, in general, and in history of education, particularly the early part of the 20th century. According to Randall,

> the orthodoxy that ruled in English language South African universities in South Africa was closely modelled on the one in Britain; it too followed a heavily factual linear and chronological approach and it too concentrated on Western schooling. Where it considered schooling in South Africa at all, it dealt almost exclusively with the development of a public school system for whites. (1988: 15)

This approach is exemplified in his case study of the University of Cape Town (UCT); it was the same in Afrikaans universities and universities established for different black ethnic groups in 1959. Here, the historico-paedagogics approach became dominant. One of its key features was that it considered isolation from the mother discipline of history vital to its existence (Randall 1990).

But there were also differences. In both the USA and UK, history of education in universities was marked by major changes in approach over the course of the century. Writing about these changes, McCulloch noted that 'a succession of challenges arose against once-dominant orthodoxies in history that amounted to an all-encompassing wave of historical revisionism' (2017: 4). This wave of revisionism that displaced triumphalist Whiggish stories of the progress of public schooling emerged in the 1960s, and that placed the study of education and society at their centre, essentially passed South African historians of education by until the late 1970s. The 1976 youth revolts provoked a change. At UCT, Randall describes a process whereby history, which had increasingly become historico-paedagogics oriented, was completely displaced by the sociology of education and taught as part of other courses. Changes that occurred post 1977 were, he argues, most marked

at the Universities of the Witwatersrand (Wits), Western Cape and Cape Town (Randall 1988). By 1986, when he concluded his study, history of education was not strongly represented in the one-year initial teacher education courses available at universities. In most cases, it was not taught as a separate subject in its own right but, rather, as part of a composite or multi-disciplinary programme. However, by 1986, most English-language universities had moved away from traditional 'Facts and Acts, Great Man' approaches to history of education although these traditional approaches still prevailed in Afrikaans-speaking universities. Political economy, as a particular way of doing history of education, was indeed being taught at only Wits and UCT. The stress in English-speaking universities had become more 'thematic and issue-centred' and this entailed both 'gains and losses' for history of education (Randall 1988: 278). The preeminent gain, Randall felt, was the abandonment of a Eurocentric approach but the loss was inadequate attention to providing prospective teachers with a sense of history.

Assessments since 1994 have come to the paradoxical conclusion that history of education has tailed off considerably since a high point in the late apartheid period (Cross, Carpentier & Ait-Mehdi 2009; Kallaway 2012, 2017). In a short, preliminary report in 2015, Kallaway, Krige and Swartz investigated the prospectuses and handbooks of 11 institutions. They show that hardly any of them signal the teaching of history of education in any of their degree or professional programmes including BEd, PGCE, BEd (Hons) and MEd (Kallaway et al. 2015) This is suggestive and requires more in-depth investigation.

Both Cross et al. (2009) and Kallaway (2012, 2017) also suggest that the attack that was mounted in the latter years of apartheid against the fundamental paedagogics approach, dominant in the Afrikaans-speaking universities, was successful. Kallaway, indeed, refers to it as having been 'mothballed' (2017: 38). Both draw attention to how neo-liberalism and a market orientation in higher education have driven out interest in history. In addition, there is concern about the relationship between historical ignorance and poor policy. One of Kallaway's main arguments is that had policy-makers taken history into account, better policies would have emerged. Because of this 'denial' of history, occurring not only in South Africa but also internationally, history of education in universities has come under threat, 'abandoned in the formal teaching of the subject . . . in favour of an ever-greater emphasis on courses in educational management and leadership, and the specificities of pedagogical practice' (Kallaway 2017: 36).

Nonetheless, history of education remains a component of the undergraduate BEd and, to some extent, postgraduate teacher education preparation. The question remains of what is now taught in the name of history of education. This is a significant question in the context of debates on continuities in the coloniality of university curricula. On this a great deal has been written. Two dimensions of a colonial or Eurocentric approach and its alternative were distilled specifically from the work of Sebastian Conrad (2015) and Achille Mbembe (2008) to analyse the interviews, course outlines and textbooks. These dimensions relate, on one hand, to the content of history and, on the other, to the entanglement of processes of knowledge production with colonialism. The first dimension is what Conrad calls the 'Europe-as-prime-mover-of-history strand' and the second,

'conceptual Eurocentrism.' The strand seeing Europe as prime mover of history sees Europe

> as the only active shaper of world history. . . . Europe acts, the rest of the world responds. Europe has 'agency'; the rest of the world is passive. Europe makes history; the rest of the world has none until it is brought into contact with Europe. Europe is the centre, the rest of the world is its periphery. Europeans alone are capable of initiating change and modernisation, the rest of the world is not. (Conrad 2015: 165)

Or, as Mbembe expresses it, a post-colonial or de-colonised history would reveal the 'symbolic workings' of representations forcing the 'subjugated into silence and inaction' (Mbembe 2008: np). A de-colonial approach would reveal 'the colonized person [as] a living, talking, conscious, active individual whose identity arises from a three-pronged movement of violation, erasure and self-rewriting' (ibid.).

The second dimension is defined by Conrad as 'conceptual Eurocentrism' which, by contrast, is concerned with the 'norms, concepts and narratives used to make sense of the past.' These, according to Conrad, 'can be Eurocentric even when Europe is not at issue' (Conrad 2015: 165). Thus, in the recreation of Sino-centric or Afro-centric histories, European history can still be the template. It is a more difficult issue than the former to address, given the global spread of European conceptual tools and their continuous reiteration and reproduction through educational institutions. Writing about this aspect, Mbembe refers to

> epistemic coloniality, that is, the endless production of theories that are based on European traditions; are produced nearly always by Europeans or Euro-American men who are the only ones accepted as capable of reaching universality; a particular anthropological knowledge, which is a process of knowing about Others – but a process that never fully acknowledges these Others as thinking and knowledge-producing subjects. (Mbembe nd: 18)

A Eurocentric approach is one that attributes truth only to the Western way of knowledge production. It is a canon that disregards other epistemic traditions. But, using Fanon, he is also critical of the equation of 'de-colonisation as Africanisation.' Taking account of the 'exhaustion of the present academic model' (ibid.) as well as the limitations of a simple Africanisation approach, he argues for 'pluriversity,' as a

> process that does not necessarily abandon the notion of universal knowledge for humanity, but which embraces it via *a horizontal strategy of openness to dialogue among different epistemic traditions . . .* a less provincial and more open critical cosmopolitan pluriversalism. (Mbembe nd: 19)

Likewise, Conrad argues for an intellectual cosmopolitanism.

Based on these analyses, and in the context of the history of history of education in South Africa, the question must be asked as to whether there are continuities or ruptures with the past in terms of how history of education is conceptualised and taught, as well as who teaches it and how. In order to understand this, interviews were conducted in 16 of South Africa's 25 universities and universities of technology. In addition, course outlines and textbooks in use were requested and analysed. Since universities of technology have a mainly technical and vocational orientation, and

do not train school teachers, they do not offer history of education. However, two of them did attempt to take up questions of the history of the educational past, albeit not in an explicit programme or course on history of education. Two new universities were also excluded from the study because their courses have been designed by existing universities and so would have constituted repetition. Questions were focused on what is taught, who teaches it and why, time allocations, goals and expectations of what students should learn and know, teaching methodologies, contextual issues and approaches towards decolonisation. A simple content analysis was conducted, and themes identified. In order to preserve the anonymity of interviewees, the names of interviewees and place of interviews is not mentioned in the notes. The article proceeds by presenting, first, a brief overview of where and by whom history of education is taught and, then, a sense of content in terms of decolonisation and, finally, an analysis of the textbooks.

The article argues first that, while history of education occupies a relatively minor part of the teacher preparation curriculum, the most significant aspect here is the impact of limited resources for teacher education, and large numbers of students on quality. It argues, second, that whereas the first dimension of decolonisation as discussed above can be found in the self-understandings by lecturers of what they are doing, as well as in their course outlines, recently produced textbooks are less convincing in the degree to which they have managed to escape the old colonial orthodoxy described by Randall. To some extent, the mimicry of trends in the UK and USA that he observed still prevails. To the extent that there is an effort by some lecturers to introduce students to different perspectives on, and approaches to, history – including the history of indigenous education – conceptual pluriversity, or the second dimension, has been achieved. However, the concepts and norms used are still very much within a Western canon, albeit a critical canon within it.

Conditions of teaching history of education

History of education is taught in universities' teacher education faculties, mainly as a module in the four-year undergraduate BEd, as part of the foundations of education, or in the one-year Post-Graduate Certificate of Education (PGCE) Although it is a compulsory module for all first-year BEd students in several universities, and numbers can be large (going up to 2,000), the time allocations are normally not more than four weeks per annum. In isolated cases, it is taught as part of another focus area, or at other levels.

At universities of technology, history of education is understandably not a major focus per se, given their historically technical orientation, but there have been efforts to include it in teacher preparation. Here, students would not have done history beyond Grade 9, and this was also true for some universities (Interviews 9 & 18: 27 September 2016). At one university of technology, a cross-cutting course that all students have to take has a strong emphasis on encouraging the students to reflect on their histories and experiences, particularly their journeys from childhood to university. In the process, they are required to conduct oral histories of their families and to share these with other students. In reflecting on the course, the coordinator said that 'the course has more

to do with history, about having to write something about historical events' than any other discipline, even though the intention was not to teach 'History with a capital H' (Interview 38: 2 October 2016). Another includes history of higher education as part of a focus on recent developments in higher education and the history of technical and vocational education as part of an advanced diploma. At universities, it is generally taught as a stand-alone, but one interviewee noted that 'it is embedded in everything that we do, from the start to the end' even though it was only taught over a 4-5 week period. When the course dealt with 'our different histories and life-stories and our indirect knowledge,' it treated history as an integral and not abstract and isolated body of knowledge (Interview 27: 18 January 2017).

The allocation of staff and resources to the subject indicates not only that it is a low-status subject, but also that financial pressures on universities are having negative effects on the quality of what is taught and how it is taught. Both declining funding to higher education since 1994, and the subsidy formula that places education on one of the lowest rungs of the funding hierarchy, militate against effective staffing for teacher education (Balfour 2015). A government report of 2013 found that South Africa's budget for universities as a percentage of gross domestic product (GDP) was just 0.75%, lower than the Africa-wide proportion of 0.78% and the global proportion of 0.84%. It also falls short of the proportion of 1.21% spent by OECD countries. The committee also found that in the decade between 2000 and 2010, state funding per full-time equivalent student fell by 1.1% annually in real terms (DHET 2013: 7). But each of these students' fees increased by 2.5% annually during the same period. This declining budget against increasing fees lay at the root of the student explosions of 2015.

The effects on history of education, very low down on the food chain, was marked. A distance education institution, which boasted a staff of 34 in the field of history of education in 1988, now has two members of staff. At another, a year-long course has been reduced to eight days in the PGCE and four weeks in BEd Honours: 'so there isn't time for much more than skimming the surface' (Interview 18: 27 September 2016). At others, including urban liberal and rural universities, classes are so large that unqualified markers, with no background in history are appointed to conduct assessments. One lecturer at a reputable urban, historically white liberal university was taking early retirement because the pressure of numbers with no additional staff to support marking was making it untenable to continue; the option of employing unqualified people at low rates was not feasible, as far as she was concerned (Interview 28: 1 September 2016; see also Interviews 21 & 23: 22 & 29 September 2016). Class sizes also affect overall quality by impacting on methodology. One lecturer noted that

> you can find yourself in an auditorium where you have about 500 chairs and 500 students are standing, kneeling against the wall. And you have no sound system. . . . And you are not sure whether they can hear what you are saying. . . . We try to raise our voices, but it's difficult. (Interview 26: 4 October 2016)

Another said that 'students end up getting bored, playing with their cell phones, they talk, they do this and that, so lectures would be a bit of a mess, chaotic' (Interview 24: 25 August 2016). In this

'survivalist' context of teaching large classes, it was considered virtually impossible to induct students into historical modes of doing and understanding (Interviews 21 & 23: 22 & 29 September 2016).

African agency in goals, content and approaches

The content and approach taken in courses vary considerably. Some lecturers prefer to integrate it into different thematic areas, while others deal with it as a discrete subject, albeit with limited time. The majority saw history as important in providing a sense of history, context, knowledge, insight, perspective and empathy. Whereas only one person said she didn't understand the aims of a module on history of education, the majority saw it as important in giving students 'an understanding of where our education system has come from' and of 'the context in which we find ourselves' so that they can better assess 'where we are, where we are going and the choices we have.' 'I am not a history teacher,' said one person, 'but I think it gives you something bigger.' Another also felt that 'it gives you a broader perspective, enlarges your horizons, so whatever happens at present you can relate it, see how it has evolved.' A few were particularly concerned with giving students 'knowledge' in the sense of 'facts' in order to address the 'ignorance' that enables 'misinterpretation of so many things.'

Providing students with a 'different kind of lens,' a 'shifting gaze' with and from which to see the world, understanding of different schools of thought, tools of analysis for a 'more critical approach' that also enables students to stand in the position of understanding a different group's point of view, was important for these and other interviewees. Here, becoming aware of 'what Jansen (2009) has named "the indirect knowledge" that students bring from their homes and communities' and 'getting an idea of where other people are coming from,' plays an important part in what it is that is being aimed at. For the interviewees who tried to give students a sense of historiographies of education, it was important that students gained 'an interpretive understanding of history' as well as 'some sort of insight into themselves and their predicaments . . . a sense of how things shift over time . . . where they are now . . . as making history at this very important moment: history can work in that diachronic way [in helping them see] the bigger picture [and] making connections.' 'History,' said this interviewee, 'really helps you understand the process issues, that [things] just don't fall out of the sky.' This view of 'connecting the past with the present' of 'what was with what is' was important to most of the interviewees. One had an activist understanding of his role and sought to provide students not only with intellectual tools, but also of turning them into 'agents of change' who might be enabled through the knowledge they gained to become members of trade unions, for example (Interview 21: 22 September 2016).

What was taught varied, but there was a broad similarity. The majority, with the exception of those who taught from the textbooks, did not manage to do very much on the pre-apartheid period. Those who did, might include indigenous and mission education or 'turning points in education.' Each person interviewed taught the history of apartheid and emergence and goals of Bantu Education, and took a critical stance towards it, including teaching about resistance to apartheid education.

Some black writers were included in course outlines. Some gave students oral history projects to conduct.

Do these lecturers think that they teach decolonised histories of education? The question gave all of them pause for thought. Pressures for a decolonised curriculum vary from institution to institution and so did perspectives on it. Very few had consciously thought about whether their courses were decolonised or not. Interpretations of the issue focused, on one hand, on the colour of authors and actors in history and whether it was legitimate to use the writings of white authors and to teach white history or not. On the other, they focused on the stance adopted by writers, whether these were colonial or anti-colonial, the degree of Afro-centricity, on the nature of agency attributed to social actors and, finally, to the construction of knowledge. Within this framework, indigenous education and the epistemological implications for contemporary interpretations were considered vital (Interview 21: 22 September 2016). But approaches to this question recognised the complexity of the issues. One responded to the question by saying that as a student at a liberal urban university, he was exposed to revisionist material 'with an anti-colonial stance' but 'I suppose if you think of colonisation as articles mostly being written by white academics, I'm not too sure.' He wasn't sure because he found these works valuable and that they couldn't be ignored. Not all of the articles from a revisionist perspective, such as those by Michael Cross, a key and influential historian of education, whom he used in his classes, had been written by whites either (Interview 31: 4 October 2016). Another interviewee, who used the textbook and more traditional approaches to the history of education, felt that it was unavoidable to refer to whites in history and that their role could not be removed, and so it had to be taught (Interview 26: 4 October 2016).

One defined a decolonised curriculum not in terms of the content and whether it included whites or not, but as one 'that simply assumes that anyone is potentially a constructor of knowledge and that we don't privilege any one tradition, or the tradition of any one social group over that of another. But within a university there is something that is intrinsic to critical inquiry – which is about debate, contestation – that remains. And that doesn't change (Interview 38: 2 October 2016). For another, it meant both contextualising approaches to knowledge and showing how they were products of their time as well as 'shaking the intellectual trees of the students' (Interview 18: 27 September 2016). Another approach, taken by only one of the interviewees however, argued that dispensing with the notion of xenophobia, as an invention of white people, was part of the process of decolonising the curriculum (Interview 31: 4 October 2016). The textbooks used within some faculties of education need to be seen against this background of diversity of approach and mediation.

Textbook use in history of education

To what extent do the textbooks that have been written for history for education embody the broad vision that seems to animate most of the interviewees? Whereas some lecturers rely on prescribed textbooks, not all do, preferring to work through their own readings selected for the students, or teaching through the textbook but adding where it is found to be deficient. A third of those

interviewed used textbooks but all, except for one, did so with reservations. At one institution, there had been a mini-revolt by students against the history of education content of a prescribed textbook, and so publishers were requested to revise it. At another, a textbook was used but supplemented with additional material because it was found to be deficient. Several lecturers had severe reservations and did not use prescribed textbooks at all. Said one: 'We don't have a single textbook. For obvious reasons: our curriculum will differ from yours. If we have a book, it should be what we have compiled for ourselves' (Interview 8: 30 September 2016). Another found that the history section of the textbook prescribed for her university 'wasn't good at all. . . . I actually didn't like it. . . . The historiography was a bit clueless' (Interview 28: 1 September 2016). Another explained how he had been asked to help revise the textbook about which teachers had complained, but hadn't found it satisfactory at all (Interview 9: 23 September 2016). Another, at a rural university, said he thought the textbook 'didn't go deep enough analytically. I was a bit disappointed. I felt some of the issues were covered very shoddily. I was very surprised actually, given which institutions were involved' (Interview 31: 4 October 2016). Instead, this interviewee had given students references to look up on the internet, downloaded other articles for them, and generally tried 'to give (the students) a historiographical understanding of revisionist history and postapartheid history and why things didn't turn out the way we thought they would.'

To what extent are the criticisms justified, bearing in mind that not all lecturers use textbooks, and even though, as two of the interviewees intimated, the textbook came into a context where there was nothing and was at least something more up-to-date that could be used than earlier texts dating from the 1980s (Interviews 27 & 33: 18 January & 24 January 2017). The textbooks referred to by the lecturers are analysed below.

Not all universities use textbooks and, indeed, spurn them. But some do use them, and these deserve some attention. But before turning to the approach in these textbooks, it is necessary to examine the textbook as tool in higher education from a theoretical perspective. Theoretically, the understanding of textbooks in the work of Michael Apple is an important point of departure. Here, the relationship of official knowledge to power and politics is central (Apple 1995, 1999, 2000). Speaking specifically of school textbooks, his main argument is that the official knowledge represented in textbooks is not neutral, but representations of dominant knowledge that act to legitimate dominant social relations. As such, they represent 'particular constructions of reality, particular ways of selecting and organising that vast universe of possible knowledge' in a manner that legitimises particular power relations, configurations and constellations (Apple & Christian-Smith 1991: 3) Textbooks become 'the horizon of the taken-for-granted' (ibid.: 12). Related to this approach, is the view that textbooks represent particular imaginings of the nation which are often raced, gendered and classed (Foster & Crawford 2006).

Analysis of history textbooks in South Africa has historically been done using different types of qualitative methods. Maposa has pointed out that while content and hermeneutic analysis have been preferred methods, critical discourse analysis can also provide insight into how textbooks construct dominant knowledge (Maposa 2015). Our analysis will be a combination of content and

critical discourse analysis. Overall, and drawing on the approaches identified in Conrad and Mbembe to decolonisation, we are concerned with the question of who is given agency in the historical narratives and what kinds of conceptual tools are given students to critique the narratives presented. In each textbook, we will analyse the amount of space devoted to white and black history. we will then compare the thematic and interpretive approaches identified by Randall with those prevailing in these texts. We will begin with the text with least historical content, *Educational Studies for Initial Teacher Development* (Ramrathan, le Grange & Higgs 2017), go on to the next, which has a fair amount of text devoted to history of education, *Education Studies* (Horsthemke, Siyakwazi, Walton & Wolhuter 2013), and then go on to the one completely devoted to history of education, *A History of Schooling in South Africa* (Booyse, le Roux, Seroto & Wolhuter 2011).

Textbooks: Reassertion of colonial orthodoxy

The most recent of the textbooks, published in 2017 and edited by sociologists and philosophers of education, two black and one white, at one historically English-speaking and two historically Afrikaans-speaking universities, gives Kallaway pride of place by positioning his chapter first in the book. The article is a mainly historiographical piece, pointing to the paucity of research in history of education. This is the only chapter out of 30 others in a textbook ostensibly devoted to the four canonical disciplines.

The second textbook, published in 2013, includes no historians of education among its editors. Two of the editors are from an English-speaking university, one from an Afrikaans-speaking and one from a historically black university of technology, that is, one black woman and three white men. We will analyse the Eurocentrism of this text by reference, first, to space and, second, to the approach adopted. We will analyse space in two ways: first, in terms of how black and white are organised in the space of the chapter and, second, how black and white are positioned in relation to each other. The approach adopted by the textbook will, to some extent, be seen to flow from this.

The text can be shown to represent the orthodoxy outlined by Randall both in terms of its allocation of agency and treatment of subject matter. Superficially however, the chapters do attempt to move away from narrow nationalist accounts by including a comparative emphasis. This comparative emphasis was historically more elaborated in the Afrikaans-speaking than English-speaking universities. However, the specifically *historical* dimension of the accounts is virtually non-existent.

Education Studies organises its section on history of education into chapters on the history of education in South Africa, international trends in educational historiography and a history of selected education systems. The majority of pages are devoted to 'a history of selected education systems,' they include Brazil, China, Egypt, South Korea, Sweden, Tanzania and the United States but, on average, only five pages is devoted to each country. While boxes can be ticked that the chapter 'covers' Africa (albeit only Tanzania and Egypt out of a total of nine), the chapters on each country are extremely superficial. Each chapter provides an account of the current system, its

structure and organisation, financing and governance, some background history, maps and activities. The emphasis is on *system* rather than *historical change*. The accounts are of necessity extremely general, unable to provide any sense either of historical change or of historiographical debate in each.

Over-simplification is evident in the framing of the chapters as well as in each chapter. The chapters frame the discussion with a notion of convergence and divergence between systems of education drawn from Inkeles and Sirowy's (1983) publication. This approach is presented as the only way to explain difference and similarity in comparative historical educational development. There is no sense of debate in the area; rather, the information presented is taken for granted as the 'truth' of a system. There is no sense at all of the rich historiographical debates and traditions in the US of the US system. The history of slavery, race and gender inequality in US education comprise half a page in total.

The section on Tanzania concentrates overwhelmingly on the post-colonial period from 1967 when Nyerere introduced education for self-reliance and on the contemporary structure of the system. Similarly, a paragraph suffices for the history of Egyptian education before the Arab Spring, which is given a space disproportionate to the impact on the system of education, which is the main focus of the chapter. Whereas the chapter on Tanzania concludes with a notion of its 'valiant' efforts to overcome its colonial past, pluckily keeping notions of equality and quality alive while confronted by challenges of economic development and poverty reduction, that on Egypt muses on the relationship between demands for a secular democratic as opposed to Islamic state, and finds the 'mismatch demanded by the economy and what the education system provides' as being of greatest challenge (Horsthemke et al. 2013: 79).

The spatial positioning of Africa among these chapters is evident in the contrasting conclusions of chapters on Brazil, China, USA, South Korea and Sweden. The positioning revolves around the relationship of education to the economy, which is thus assumed as the most important feature of educational systems. Each identifies education in terms of its role in relation to the economy. Thus, South Korean education is presented in relation to its successful and competitive modern economy, the American in relation to its rise as an industrial power, the Swedish in terms of growing inequality confronted with an egalitarian commitment to education, the Brazilian in terms of disparities and the Chinese in relation to its unequal investment in education relative to other Asian countries and corresponding challenges of unequal educational opportunity. For the African countries, the issues are mismatches of needs and outputs. This approach exemplifies not so much a negative positioning of African countries as a flawed conceptual approach that assumes neat and direct links between education and the economy (Vally & Motala 2014).

Sources used in activities include Wikipedia (on the Arab Spring), statistics from Tanzania's Ministry of Finance and a quotation from a secondary source on Bantu education in South Africa. The activities related to these sources are not interested in developing a sense of multi-perspectivalism. Rather, they are presented as facts to be memorised and repeated. The concluding assessment requires students to identify in each of the countries the official language,

most outstanding characteristic, cultural values and ideology, provision of compulsory education, drivers of education, main educational lessons and main educational challenge – as though there is agreement on what these are and as though there is no complexity in each system.

Chapter two, which deals with international trends in educational historiography, comprises 15 pages and covers Western Europe at the beginning of the new millennium, post-1990 Russia, the USA, England, France and Greece. Combined, there are two African case studies out of a total of 13, if this chapter is included. The main problem with this chapter is linked to its somewhat limited interpretation of the word 'historiography.' Historiography refers to schools of thought or debate, and their periodisation. In a discussion of historiography, one would expect to see not only the key issues, themes and methodologies dealt with by a particular school, but also its main exponents. If history can be considered a continual process of debate over interpretation, then these diverging interpretations are its historiography. Historiography is concerned, as the introduction to this section points out, with the 'study of the writing of history' and 'the content and methods of writing history as well as the aims and the features thereof' (Horsthemke et al. 2013: 43).

Although the chapter makes a sturdy effort to highlight the main schools of thought in educational history, once again, the space limitations mean that this is dealt with extremely superficially. The educational historiographies of post-1990 Russia, England and the US, for example, are contained in just over one page for each. France and Greece are blessed with two pages and Western Europe with two and a half. There was clearly not enough space to show how they were linked to broader socioeconomic, political, social and intellectual changes that might have been connected over space and time.

There is a complete silence on the treatment of education and its connection to imperialism and colonialism within these educational historiographies. Even though Empire and colonies were integral to each, their historiographies are concerned with the particular national history, often assuming a universal character, when its shadow colonial counterpart was hardly visible. In the chapter on educational historiography in England, Fred Clarke's contribution is extolled, with no mention of his period as Professor of Education in the Cape Colony at the University of Cape Town, what his experience may have taught him there, or what influence he had on colonial practices and approaches to education. This, despite the fact that it has been written about extensively (Kallaway 1996).

The chapter on the history of education is most disappointing of all. The way it conceptualises and periodises history of education means that by far the greatest amount of space is given to the development of the white system of education. A section on pre-colonial education precedes sections on education during Dutch colonisation (about three pages), education under the British (four and a half pages), five pages on mission education (two of which are linked to activities), education in the Orange Free State and South African Republic (just over three pages), education during the South African Wars (four pages), apartheid education (six pages) and the present system (two and a half pages). Up to apartheid, then, about eight pages are spent on pre-colonial and mission education compared with 11 on the development of white education. Black and white

education are dealt with separately and not as part of a whole.

The problem lies of course in the conceptualisation and the sources. The chapter is based, amongst other very old historians of education, on the work of Theal. In the words of Hamilton, Mbenga and Ross he was responsible for developing the 'white conservative consensus' that came to dominate settler-colonial history in South Africa before the advent of a radical new social history (Hamilton et al. 2012). With the exception of a penultimate section on black resistance in the 1980s, the chapter is written with no reference to a single secondary source published before 1977. In other words, it is written as if the historiographical revolution that occurred in the 1970s and 1980s, and which also had an impact on the history of education, never occurred.

In 1988 UNISA, the largest distance education university in South Africa and Africa, had 20 members of staff in its history of education division, compared with two at Wits, for example. UNISA was particularly significant in the development of historico-paedagogics and metagogics. The third text, produced for UNISA students, *A History of Schooling in South Africa,* is a history that tries to break with this tradition. Its authors include one black person. The main purpose for bringing it out, one of the authors said in an interview, was the absence of anything recent and usable for university teaching on the history of education (Interview 33: 24 January 2017).

The introduction recognises different approaches to education, even though its presentation of the characteristics and differences somewhat mangles the radical approach, which it calls 'liberation socialism.' Its own commitment is hinted at in the references to 'culture.' In his introductory overview of 20th century historiographical trends, Wolhuter (in Booyse et al. 2011, and citing Depaepe) presents a history of ideas giving way to social history that has, in turn, led to the rise of cultural history. Cultural historians, according to Wolhuter, explore questions of knowledge, language, power and social change (Booyse et al. 2011). A second chapter also attempts to introduce students to questions of interpretation and the nature of evidence in history. The book has interesting illustrations, maps and time-lines. These are not, however, used to introduce students to, or encourage understanding of, different historical perspectives on a matter; they are, rather, used in an illustrative manner.

Some chapters (on indigenous education, early education in the Cape and the section on African education during apartheid) draw on revisionist history and some original sources. The bulk, however, rely on old secondary sources representing the traditional orthodoxy. The main reason for this may be that the conceptualisation remains anchored in a political administrative approach that gives agency to the colonial agents responsible for developing formal schooling for whites. Thus, the chapter on indigenous education is followed by 'European Foundations Shaping Schooling in South Africa: Early Dutch and British Colonial Influence' and that by 'The Influence of Western Education on Education in the Cape and Natal: 1807–1899,' 'Education in the Afrikaner Republics: Evolving Systems Under Pioneering Conditions,' 'The Provision of Education During the First Half of the 20th Century,' 'Education Provisioning During the Period of National Party Rule' and 'Post-1994 Educational Developments.'

History of education for black children and students is not ignored in this account, but is treated as

a separate section within each chapter. Fewer pages are allocated to education for black children. Contrary to usage which defines 'coloured,' 'Indian' and 'African' as 'black,' the book uses the term black to denote African. It thus uncritically accepts colonial constructions of social and racial difference in South Africa. The main problem with the approach is that the segregation of education during the colonial period and most of the 20th century is left unproblematised and is treated as part of the natural development of education alongside that of whites. Out of 27 pages, the chapter on early Dutch and British colonial influence allocates two pages to Christian mission education and three to Muslim education. Out of 35 pages, the chapter 'Influences of Western Education on Education in the Cape and Natal: 1807–1899,' allocates six to mission education, three to Indian and one and a half to Muslim education in the Cape. The chapter, 'Education in the Afrikaner Republics: Evolving Systems of Education Under Pioneering Conditions' allocates one out of 65 pages to the 'Education of Black Children.' As in the past, this chapter, like the next, gives a lot more space to male administrators of education like Mansvelt, du Toit, Hertzog and Smuts and to the 'progress' in white education. The chapter, 'Provision of Education During the First Half of the 20th Century,' discuses provision for coloured, black and Indian people in 15 out of 45 pages. The chapter on National Party Rule allocates 20 out of 54 pages to education of coloured, Indian and black children. In the final chapter, these racial demarcations disappear. The further back in the colonial past, the less attention is paid to black education.

The two main problems with the text, which render it a modified form of the traditional orthodoxy, are first, the unproblematised focus on the developing colonial political and administrative structure of education as a natural evolutionary process and, second, the reliance on histories of education that were produced during periods of segregation and apartheid and did not problematise the construction of education. The narrow focus on the development of formal schooling for whites, Indians, coloureds and Africans – categories that are themselves unproblematised – ignores important revisonist literature that broadened the study of education from its formal provision by whites to its appropriation and use by Africans, the informal development of literacy, and so on. The social history revisionism of the latter part of the 20th century brought African agency and initiative into focus – none of this is evident in this relentless account of 'facts and acts' in formal provision (see, for example, Dick 2013; Kallaway 1984, 2002). There are other major gaps in the account of the development of a segregated and colonial system of education, given that it is not the focus. They include, for example, the major role of the notion of adapted and industrial education promoted by men like CT Loram, Booker T Washington and Dube at Ohlange, about whom there is also a considerable literature. The relationships developed between people over educational initiatives also receive scant attention.

That it attempts to provide a history is laudable. But what the book reveals is the continued intellectual academic apartheid that exists in South Africa, and the failure to create a history of education in South Africa that does full justice to the intellectual approaches and research that do exist.

It could be argued, as one of the respondents in the study did, that since education and schools were

brought into being by whites in mission societies and different agencies including the state, this history would have to be told in this way. There is no conception of an alternative because Africans are not perceived as having had agency in the development of literacy or construction of schools. And yet there is ample evidence that throughout the 19th and 20th centuries, Africans did establish their own schools. Schools would not have spread were it not for African teachers. But there were also very different responses to schooling, as the vast literature on mission education has shown. There were also fierce debates about what schools should look like, throughout the long history of interaction between black and white, among both white and black people – and none of this debate is evident in this or the other books. An alternative conceptualisation that restores agency to African people would bring to the fore the wealth of evidence on these issues, as well as the hidden histories of literacy and reading beyond policy.

Conclusion

History of education was integral to the preparation of students in education faculties under apartheid. However, the dominant approach was a traditional Eurocentric orthodoxy that shared much with mainstream historiographical trends giving whites agency and placing at the centre of the story the development of a public schooling system for whites. The highly unequal character of education was reflected in the way that history of education was conceived and taught. Only in three of the more liberal universities were approaches emphasising the history of black education emphasised and taught. During the 1990s, there was a hiatus in the teaching of history of education, but it has gradually resurfaced. The publication of three textbooks that include history of education, sometimes alongside comparative education, provides some insight into the approaches that now prevail.

Interviews with history of education lecturers revealed that funding cuts have meant that methods are often perforce superficial, and that students are given short shrift when it comes to assessment of their work. In some universities, low status has meant that lecturers try to integrate the subject into broader interdisciplinary themes; in others, inter-disciplinarity has also enabled a life history approach that has placed students' histories at the centre of their educational experience.

Two types of curriculum seem to prevail. One is essentially a history of black education, beginning with apartheid and providing students with access to the history of resistance and change in education in the last half century. Others begin with indigenous education before colonialism, provide brief insights into colonial education, and then go on to apartheid education and resistance to it. Some expose students to different perspectives on and approaches to this history.

It is clear that history of education continues to be taught at universities, within highly constrained contexts, for short periods of time. While approaches adopted by interviewees vary and demonstrate adoption of approaches that could be considered decolonised, the textbooks that have emerged do not unequivocally reinforce these positions. To some extent, it could be argued that since 2000 there has been the reassertion of older orthodoxies. The analysis of textbooks issued under the auspices of a combination of formerly English-speaking and Afrikaans universities, but

mainly authored by authors from the formerly Afrikaans-speaking universities, shows retention of its essential and key elements with some adaptation. An integrated, decolonised narrative of the history of schooling does not yet exist and is not being taught to students. The reasons for this are complex but must have something to do with the continued isolation of those academics working on history of education from currents in mainstream history, from colleagues who explore different approaches, as well as the absence of a robust and collective intellectual project in the field in South Africa.

There are different ways and newer approaches that could be taken on board. What is required is a bold new reconceptualisation that draws on recent literatures. The assertion of African agency and initiative and the examination of African responses to formal schooling, both mission and state – from negotiation to appropriation to resistance and creation of alternatives – are extremely well-documented. So are the hidden histories of literacy and reading outside formal schooling, among slaves, migrant workers, trade unions, community organisations and political organisations, to mention but a few. There is indeed a literature on the hidden side of formal schooling that does not tell a happy story of progress but could, nonetheless, form part of a South African history of education. Histories of care and their relationship to education could be explored. The linkages between this history and broader currents of world history are also vital for a regeneration of the field. A critical approach to concepts and approaches in history of education as part of a broader field could further enhance the field.

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Commemorating the 50th anniversary of forced removals: Contested District Six discourses

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Abstract

After 50 years of forced removals, popular colonial-apartheid representations of District Six are often reproduced to represent relatively unaltered popular meaning in postapartheid South Africa. These depictions have become hegemonic and are often regarded as the only frame for interpreting the history of District Six. Consequently, texts and practices of memory and history are repeated as essentialisms that militate against the decolonisation of a postapartheid historical narrative. An alternative representational framework is required to make an incisive epistemological break from a colonial past. In this article, District Six is employed as a case study to demonstrate how colonial representations became essentialisms in need of renovation. Using historical literary sources and commemorative events as data, this article illustrates how dominant discourses are constructed and reproduced in the popular imagination. To explain the contested content and nature of these discourses, Alvares' notion of *decolonising history* and Foucault's concepts, *archaeology* and *genealogy,* are employed as conceptual and analytical frameworks. Finally, to address the bias discourses on District Six, an alternative reading is presented to give voice to the marginalised and suppressed texts, silences and forgotten memories deemed culturally significant in a postapartheid society.

Keywords: District Six, forced removals, 50th anniversary, contested discourses, decolonisation, history

Introduction

The 50th anniversary of the declaration of District Six as a whites-only area was widely commemorated in Cape Town in February 2016. A common, but disconcerting, observation in these commemorative events was the repetition of contested stereotypical images of District Six long considered biased and objectionable. These images are mainly constructions that grew out of earlier literature and anthropological sources representing culture of subjugated communities as inferior and patronisable (Alvares 1991). They are the result of the repetitive myth of 'European civilization' that regarded the people of Asia and Africa as belonging to 'backward' or 'child races,' inherently inferior because of their skin colour, immorality, laziness and disregard for the sacredness of human life (Kies 1953: 6-7). Some of these characteristics are identifiable in the colonial-apartheid historiographical archive of District Six. The archive performs an 'epistemic violence' on subaltern subjectivities, lacks ethical considerations while denying cultural contributions of the marginalised (Zhaoguo 2011: 19). The official rationale for forced removals – slum, crime and overcrowding – was surreptitiously embraced by apologists who use memory and history selectively but refused to go beyond the limits imposed by their common interest to maintain the status quo. Dominant discourses emerged that erroneously portrayed District Six as an area of slum and gangsters, and its ex-residents as always 'merry' with an insatiable appetite for conviviality, alcohol and music (Nasson 1990: 49). In contradistinction to this view, District Six was also described as 'the birthplace of the national democratic movement and fountainhead of literature, intellectual and ideological development in South Africa (Dudley 1990: 203). This article addresses dominant, mainly negative representations of District Six during the colonial-apartheid era and their frequent reproduction and continuity in the postapartheid period.

The production and representation of historical memory has long been contested territory. In his study of District Six, Sauls (2004) laments that, despite significant cultural and literary contributions of scholarship, stereotypical representations of District Six seem to block how residents themselves seek to articulate their own experiences and struggles with identity and memory. Notwithstanding the fact that truth and biases often cross over categories such as insider and outsider, Sauls draws a distinction between how the outsider and the insider differ in their representations. He claims that museums and centres for cultural studies still include stereotypical literature and photographic representations of culture and identity in the face of local critique (Sauls 2004: 5). Richard Rive, a celebrated novelist born in District Six, noted that many outsiders represent the history and experiences of the oppressed in unsympathetic and superficial ways, without intimate knowledge and genuine empathy (Rive 1990). Rive provides examples of written work by outsiders using pseudonyms to present melodramatic stories that conjure up stereotypes of District Six using clichés of 'skolly, gangs, brothels and shebeens' (Rive 1990: 115). Consistent with the colonial project's intention to represent the colonised as inferior and childish, Swanson and Harries (2001), as a case in point, quote an ex-resident's memory that District Six was 'at times a place of violence, but mostly it was a place of love, tolerance and kindness' but the authors persistently concluded that 'District Six was seldom such a peaceful and harmonious community. Crime and violence were part of everyday life' (ibid.: 80) – an imposition of authorial privilege,

and subjugation of the resident's subjectivity.

Insiders often fall prey to the supremacy of outsiders, and reproduce their views inadvertently. Although considered an insider, the late Taliep Petersen's work mainly reinforces colonial-apartheid stereotypes of District Six. In collaboration with David Kramer, District Six was portrayed mainly as a place of 'gangsters, an uneducated class, illiterate and lazy hooligans hanging out on street corners' (Sauls 2004: 39). These derogatory themes remained dominant in Petersen and Kramer's productions such as *District Six: The Musical; Fairyland; Crooners; Poison;* and *Kat and the Kings.* Later in this article, reference is made to Kramer's latest production, *District Six – Kanala,* reinforcing the same stereotypes of the past.

The phrase 'memory and history' is often used in this article to denote a notion of history that is both present and distant in terms of time and space. It is a form of historical consciousness that converges the present and the past; it combines the objective as well as the subjective dimensions of history (Klein 2000). Memory is always contested and, in this article, employed as discursive practice grounded in materiality with the possibility of playing an agential role (Klein 2000). Memory and history are employed as a spatial-temporal concept of meaningful discursive practices that express knowledge of District Six as an effect of power. Beyond the view of the insider–outsider perspective, knowledge is viewed as socially constructed and therefore recognises the ontological and epistemological dimensions that allow for the emergence of multiple readings of District Six as a pedagogical space.

To develop a framework that would suggest an epistemological break from the colonial past, the article unfolds with an explication of an appropriate conceptual framework, followed by a methodological note on how data were obtained, which is followed by a presentation of findings as contested discourses. Finally, an alternative reading of District Six is presented, followed by some recommendations for future research and cultural performances.

Conceptual framing: Knowledge, regime of truth and subaltern subjectivities

The transition from apartheid to democracy was a shift in power that created space to challenge dominant colonial-apartheid historical narratives (Hill 2012). According to Foucault, a shift in power is potentially a transformation in *regimes of truth* because power and knowledge are inseparable. A Foucauldian lens that recognises the fluidity of power relations is appropriate because it provides possibility for previously hidden knowledge to surface. Based on individual and collective achievements that have been marginalised by the dominant class, in this study, the subaltern assumes a position of power that exposes the outsider and other as different. Dominant constructions of memory and history of District Six are, therefore, not fixed and permanent. They are relative to the power relations that allow possibilities for thought to relay what can be said and what may remain unsaid (Ball 1990). This study recognises that dominant discourses are subjective inclusions and exclusions from which subaltern voices have been marginalised.

In postapartheid society that is embedded in a democratic ethos and egalitarian values, stereotypes

of racial, gender and class categorisation are counterproductive. To bring about an incisive break from a colonial past, a new interpretive epistemological framework that goes beyond the mere change in content and narrative is required (Hill 2012). An assertion of power and capacity to aspire for a better future are essential ingredients for epistemological transformation (Appadurai 2004). Given the widespread experiences of forced removals across the South African landscape, District Six as a case study in colonial-apartheid's forced removal history, rich in unexplored and suppressed cultural memory, presents a microcosmic example of what potentially lies ahead for a postapartheid historiographical revision.

Drawing on Foucault's notions of *archaeology* and *genealogy*, in this paper, texts and events are analysed to explain how power operates in the production of knowledge (Smart 2004). In this study texts and events are discursive practices encompassing a selection of materials on District Six from the literary colonial-apartheid archive, and commemoration of the 2016, 50th anniversary declaration of District Six as a whites-only area. Foucault's notion of archaeology is employed to show the relationship between the texts and authorship. According to Foucault, archaeology is concerned with an understanding of statements that are regarded as significant texts. These texts are discursive formations representing disciplinary knowledge that is an effect of power. Because discursive statements are social constructions, knowledge is inseparable from the context of the author's biography. Due to the vantage position of the author, his or her statements often produce generalisations beyond context. Hence, Foucault's use of genealogy refers to the understanding of the context of an event in terms of its specificity and locality (Smart 2004). The plurality of the subject and the possibility of multiple, instead of a unified, homogenised, discourse provide a more plausible description of memory as practice.

To articulate an alternative construction of memory and history, this article recognises Alvares' (1991) notion that subjugated communities are objectified as inferior and patronisable, which needs to be challenged in postcolonial scholarship. The following methodological note explains how pre-1994 data were obtained from the literary archive, and post-1994 data were collected from various artistic productions during 2016, namely, the 50th commemoration of District Six's declaration as a whites-only area.

Methodology: Intersecting texts and cultural reproduction

This study adopts a case study design of District Six as a forced removal space to respond to the research question: 'How was District Six signified in selected historical sources and how are these depictions represented in popular memory?' To identify common discourses in selected literary works, a critical content analysis of the sources was conducted. Content analysis is used as 'a technique for making inferences by objectively and systematically identifying specified characteristics of messages' (Nieuwenhuis 2016: 111, citing Holsti 1969: 14). A critical textual analysis is understood as awareness of these texts as an exercise of power by elites. To evaluate their correspondence in popular memory, these discourses are critically discussed in relation to four 2016, 50th anniversary commemorative events, employed as a second data set. Prior to 2016,

District Six stakeholders were diligently preparing various activities to commemorate the forced removal declaration of 50 years ago (February 1966). At least four major events were organised and subsequently reported in the news media. Data for this study were taken from a collection of newspaper reports, reviews and event brochures dealing with the commemorations. The author attended three of these activities. The commemorative events referenced as data are: District Six working committee's gathering held in Black Pool Sports Complex, Salt River; District Six Museum's 50th anniversary commemoration; David Kramer's *District Six – Kanala* and *Concert innie District*, held in the Joseph Stone auditorium, Athlone.

Notwithstanding the popularity of Jeppe and Soudien (1990) and van Heyningen (1994) as prime references on District Six, for this study the material selected are based on their familiarity in the public domain and suitability to respond to the research question. The four texts under review are: *The Spirit of District Six* (Breytenbach & Barrow 1970), *District Six* (Small & Wissema 1986), *District Six: The Spirit of Kanala* (Schoeman 1994) and *Ja! So was District Six!* (Swanson & Harries 2001). To facilitate the construction of an inclusive decolonised historical discourse of District Six, literary critique, textual excavation and memory work were employed.

Based on the data analyses conducted on both the literary texts and the commemorative events, findings are presented as contested discourses that are, arguably, a relatively unaltered reproduction of hegemonic representations of the colonial-apartheid period.

Contested discourses: A discursive practice analysis

Components of a dominant discourse of District Six are presented as images of a slum, a merry community with a unsophisticated and rowdy popular life, its people with an unquenchable appetite for conviviality and an insatiable taste for alcohol, of January Coon Carnivals and gangsterism (Nasson 1990). In contradistinction, an alternative reading describes District Six as 'the birthplace of the national democratic movement and fountainhead of literature, intellectual and ideological development in South Africa' (Dudley 1990: 203).

In response to the research question, what follows are the findings of a critical review of how these discourses manifested in four popular texts and how these texts intersect with four cultural commemorative events held in early 2016.

Images of slum, poverty and drunkenness

Common images of District Six depict a slum, a poverty-stricken and gang-infested area. Breytenbach & Barrow (1970) describe the busy streets on a Saturday morning where people are living their lives in a space surrounded by poverty and drunkenness. The authors caricature a 'blind man being led by a blind drunk to the laughter of their disastrous progress' (ibid.: 5). To accentuate the slum and poverty themes, the book deals extensively with the bubonic plague of 1901 to foreground conditions of poor health and sanitation as the backdrop for forced removals to follow.

This plague resulted in the demolition of 38 houses. Corrugated iron huts were erected to house the

evacuees in Ndabeni, Cape Town's first black location (Schoeman 1994: 24). The problem of overcrowding was described 'as part of everyday life . . . it was a help mekaar [help each other] society of interdependence . . . so was the spirit of kanala' (Schoeman 1994: 41). While 'kanala' may be used to describe a closely-knit community, it was often employed to generalise poverty as common to all its residents, an incorrect description of the multi-classed community that the district was.

Swanson and Harries (2001) explain why slum clearance was justified by showing the normalcy of poor social conditions, which interestingly, was noted to be similar to the overcrowding of 'other inner-city areas such as the Left Bank of Paris, the East of London and the Bronx in New York' (ibid.: 63). The unwillingness of the City of Cape Town to spend money on upgrading much needed services such as sewerage, drinking water and roads led to slum conditions that justified demolition – an argument used to support the segregationist policies that were at work (Swanson & Harries 2001). These authors made slum conditions a consistent part of their publications.

As Barnett (1994) argues, the destruction of District Six was part of the social engineering before apartheid became law in South Africa, and the declaration as a whites-only area in 1966 was merely the fulfilment of the pre-apartheid plan to rid the city centre of the emergence of a privileged 'non-white' bourgeoisie. The authors of the above three literary texts present their descriptions of District Six (slum, poverty and overcrowding) as an inevitable outcome of a historical process. Forced removals became a necessary evil that would work in favour of the victims. While these authors portray themselves as 'sympathetic' and 'anti-apartheid,' their texts exude their liberalism, which failed to disguise their power relations in defining the historical role of the subaltern. Adam Small adopts a different ontological stance on District Six's memory – a more nuanced depiction is rendered of the same phenomenon.

Small and Wissema employ poetic and philosophical muses of District Six as a 'place and time' in history and memory (1986: 5). They use ambiguity in their description of District Six as a place of slum, writing: 'The place was a miserable "slum," after all – or the place was a terrible nest of crime . . . well it was and it wasn't, you know' (ibid.: 5). They describe the visibility of slum conditions in certain parts of District Six, but also recognise the existence of well built and maintained houses. If 1,619 properties belonged to black people (Schoeman 1994), it can be assumed that they would have been well maintained and not slum but, for ideological reasons, this was ignored. While Small and Wissema had a vision of future return, others had a more immediate mission: to capture the phenomenon of forced removals as a historical experience for the betterment of residents – in tandem with the official position of the Group Areas Board that slum clearance would provide the black under-classes with a new start (Trotter 2009). Descriptions of slum, poverty and drunkenness are, therefore, not value-free and objective. They reflect clear political and class interests of the authors.

According to Alvares (1991), outsider representations of the subaltern often convey primitive, childish and mythical representations that show little concern for ethics in their work. The first section of Breytenbach and Barrow's book (1970: 1-23) chronicles some examples of common

character types that abounded in District Six: the 'polony maker' is primitively remembered for having 'pulled his own teeth all his life'; the 'Hairdressing Saloon,' whose owner reinforces images of 'insatiable love for alcohol and gangsters' by relating stories of the shebeens selling 'thousand gallons of wine a week'; the 'tattoo artist' who describes the work done on gangsters and prostitutes with mythical symbols such as snakes, dragons, swords and ships; the 'Guardian' of the public lavatory who was a respectable man of 'ratieb' – a Muslim art performance involving playing with swords and slashes on the body that has mystified medical men for centuries; and the 'Fiddler' a beggar who played a faked violin but became the highlight of a string of crimes described by the manager of the old 'Cheltenham Hotel'. The 'spirit' of District Six is conveyed through these bizarre stories which are reinforced by 60 pages of photographic images of slum, poverty and drunkenness. These are power constructions that subtract from the dignity of District Six, which is deliberately portrayed as deviant and mysterious – a far cry from the spirit of District Six, which ironically, is the title of his book. This publication portrays overwhelmingly negative images, and remains silent about progressive and normal cultural practices in the area.

Gangs, crime and the underworld

The discourse of slum, poverty and drunkenness closely relates to District Six as a place of gangs, crime and the underworld. Together, these two descriptions sketch the official discourse of the City of Cape Town and the Nationalist government. Outsiders, and some insiders, in the form of cultural groups have contributed to the perpetuation of this fabrication.

Breytenbach and Barrow, Schoeman, and Swanson and Harries are obsessed with gangs, crime and gambling as archetypal descriptors and recurring themes. The 'street culture' of District Six is reiterated with images of drunkenness, humour and 'coons' (Breytenbach & Barrow 1970: 6). Photographs of children playing cards and older gangsters smoking and posing their impressive dressing styles are normalised images of everyday life. Gangs and crime are dealt with prominently, although residents' memories recorded that District Six was not always as violent as it was portrayed by the media and the government (Swanson & Harries 2001). Schoeman (1994) dedicated a full chapter to crime and gangs, citing a journalist who reported that most of the 'skolly gangs' had disappeared by 1964 (ibid.: 53).

Swanson and Harries (2001) came to the conclusion that District Six was seldom as peaceful and harmonious community 'as the residents want to remember' – 'crime and violence were part of everyday life and gangsters were not the harmless rogues portrayed in these recollections' (ibid.: 80). While ignoring decades of deliberate neglect that led to poor social conditions, these generalisations became hegemonic and used to support slum clearance. Images of crime and violence became entrenched in the public domain as demonstrated, 41 years after the forced removals, by an anthropological study completed at the University of Oslo entitled, *Streets, Skollies and Coons in District Six* (Lea 2007). This is an affirmation of the normalisation of dominant memory and scholarship.

Stereotypes of crime and gangs in District Six are often reinforced through the mediums of visual art and theatre performances. While numerous photographs depict gangsterism and crime as

closely associated with District Six (Schoeman 1994: 47-52), the work of David Kramer and the late Taliep Petersen, especially the play: *District Six: The Musical* and Kramer's recent commemorative event, *District Six – Kanala*, reinforce ex-residents as skollies (gangsters) and klopse (coons). What follows is a corollary to the previous two discourses: District Six, coons and music.

Coons and music as cultural stereotypes

The sum total of District Six's musical and cultural heritage is often described in one phrase: coon culture. In line with Alvares' (1991) view that subjugated communities are often portrayed as inferior and childish, the coons are dominantly associated with the subaltern. Jeppie & Soudien (1990), however, argue that the Coon Carnival, which is an annual New Year's celebration, can only be interpreted by the people themselves. Needless to say, to describe this massive operation in a singular narrative would be an oversimplification of its meaning as a social and historical event. According to Jeppie and Soudien (1990), the carnival was more than a safety valve for passion and for 'deflecting attention from social reality' – it was also a temporary liberation and commentary that involves, class, gender and culture with social, economic and political dimensions (ibid.: 70).

Notwithstanding its multi-dimensionality, outsiders describe the carnival superficially. 'They lived, they danced, they laughed, they drank, and they created happiness and infected everyone else with it. . . . The Coons, they really gave something' (Breytenbach & Barrow 1970: 5). In their publication, Breytenbach and Barrow (1970) allocate six pages to photographs of coons, gangsters, an old man dying, all symbolic of what was happening to District Six. Swanson and Harries (2001) claim that the main leisure activities of District Six people were 'going to the cinema and the New Year's Coon Carnival' (ibid.: 73). The carnival, they claim, 'promoted a broader community consciousness that crossed religious and cultural difference' (ibid. : 75). Other popular activities such as sport, homing pigeons and religious activities are omitted. Without denying the excitement that the New Year's Day brought to the streets of Cape Town, it was of brief duration and does not reflect a comprehensive picture of local culture. Similarly, theatrical performances of insiders became prominent in reproducing the coon cultural repertoire.

Without deviating from his collaborative work with the late Petersen, David Kramer's latest production, *District Six – Kanala*, performed for an extended period due to public demand. A reviewer (Thamm 2016) describes the essence of the show as a repetition of original songs commemorating the arrival of bulldozers and the destruction of a vibrant Cape Town community. The first half of the performance ended with Cape minstrels (coons) in colourful costume. Many of the songs were taken from Kramer and Petersen's *District Six: The Musical*. A critical analysis of the scenes identifies stereotypes common to those promoted by outsiders, describing District Sixers as gangsters, uneducated coons who became the unfortunate victims of apartheid.

In a commemorative event at the Joseph Stone Auditorium, music legends who once lived and performed in District Six were remembered. A tribute was paid to Rudolf Walker, who was known as the 'Nat King Cole' of Cape Town, and comedian and singer, Waseef Piekaan, satirised the racial prejudice of the coloured people as he poked fun at their obsession with straight hair that

contrasts with his ethnic, kroes threads of hair. Other musical legends remembered were the late Zayn Adam, Taliep Petersen and the band, Pacific Express. The wealth of musical and cultural talent that District Six produced renders coon music of relative cultural importance.

It would be inapt to equate District Six's cultural life with coons, cinema and music. As in the case of other historically oppressed communities elsewhere in South Africa, any recognition of their cultural contribution, locally and internationally, would have been anathema to the colonial-apartheid regime. The colonised had to be projected as culturally invisible, inferior and insignificant. Equal treatment of oppressed people's achievement and culture would undermine their inferiority and create a false impression that they were equal to the white oppressor and entitled to full citizenship, which was against the racist apartheid ideology.

Social cohesion and cosmopolitanism

Reference to social cohesion and cosmopolitanism in District Six is often presented uncritically and nostalgically. That there was a sense of social cohesion and cosmopolitism in District six cannot be denied but to assume that it was constant is to romanticise and to be uncritical. Social cohesion and cosmopolitanism were expressed unevenly in different historical periods. In the late 1880s and 1890s in many South African cities, racial discrimination became a contentious issue that influenced the spatial and economic stratification of South African society. More than two decades after the abolition of apartheid, the ghosts of institutionalised racism and territorial apartheid persist across the urban and rural geography of South Africa.

While it can be expected of District Six as an old community to have a rich social capital network, popular memory does not portray District Six in relation to the multiculturalism that is spoken about. Popular memory represents District Six as an almost exclusively coloured issue. On the contrary, District Six was not the home of only coloured people. Invariably, the texts under review as well as the commemorative events show an overwhelming neglect of cosmopolitanism. Bickford-Smith (1994: 41) argues that discriminatory attitudes entered into 'race relations' during the 1880s when official central and local state poverty relief was given to predominantly unemployed whites – the deserving poor. Capetonians who were poor but not white were regarded as a source of contamination against which white, deserving poor had to be protected through segregation (Bickford-Smith 1994). White privilege became a source of discrimination that fed into the unequal colour/class system of later Cape Town society. This notwithstanding, a later history of District Six supports the view the district's inhabitants represented a wide range of the city's population, showing respect and tolerance towards each other's religion and culture (Sauls 2004: 23).

Evidence of social cohesion was shown in the gathering of the District Six working committee, which arranged a commemorative event attended by more than 500 former residents. This event offered them an opportunity to reminisce and heal the wounds of forced removal. An event committee member claims: 'We hosted this event in remembrance of the lives and livelihoods which were lost through the forced removals of yesteryear' (People's Post 2016). With its focus on land restitution, this event had a futurist perspective that generates hope for people of different

backgrounds to return to District Six. While social cohesion was demonstrated, it is not clear whether the same can be said about the cosmopolitanism of this function.

Schoeman (1994) tells a story of a community of various races and cultures that lived together in one neighbourhood (cover blurb). Culturally, religion played an important role given that Christians, Jews and Muslims were practising their faiths alongside each other. Swanson and Harries (2001) quote an ex-resident who related how respect and love amongst community members, irrespective of their religious affiliation, were some of the most memorable characteristics of life in District Six. This resident reported that he attended Moravian School and regularly attended church despite him being a Muslim:

> 'When it was Easter we painted the church, cleaned it and even sang in the choir sometimes. When it came to bazaar time all the churches and mosques supported each other. That is the spirit they can never bring back', he lamented. (Swanson & Harries 2001: 74)

Participation in religious events and the social harmony that prevailed amongst different congregations will never be regained. Significantly, an ex-resident noted that:

> District Six had to be destroyed because of the quality of the thinking in the area. The whole cultural mix was something they couldn't handle, this cosmopolitan mix. This kind of East End mix, Jew, Arab and Christian lived in one street. That was their philosophy and that had to be destroyed. (Swanson & Harries, 2001: 77)

The cosmopolitanism that grew in District Six, like in many early urban cities that suffered from forced removals were all prime property – either near the central business district or with views of the sea and the mountains. While these areas had the potential to become permanent cosmopolitan spaces, in 1948 the National Party enforced racial spatialisation that which created apartheid communities, which curtailed the notion of a future integrated, multicultural South Africa.

To commemorate the history of District Six for its cosmopolitanism is, perhaps, one of those popular discourses that reveal the contradictory and incomplete work of outsider and insider scholarship. While experiences of Indians, Jews and others are poorly represented in the literature, Nomvuyo Ngcelwane's *Sala Kahle, District Six* provides a rare African experience in the same genre such as Hettie Adams' *William Street*, Linda Fortune's *The House in Tyne Street* and Noor Ebrahim's *Noor's Story* (Adams 2000).

Researchers have an urgent obligation to expand the archive of cosmopolitanism given the fact that access to living memory is fast eroding with time.

Intellectual and political discourses

While the themes discussed above are part of the dominant negative portrayal of District Six, the marginalised discourse is in need of elaboration. Textual analyses below indicate how the marginalised theme is neglected in the literature and cultural events. An alternative discourse adopts a decolonising ontology that recognises the role of power in knowledge construction.

With the exception of Small and Wissema (1986), the texts referenced in this article scantily treated District Six as an intellectual and political space. In only a few sentences, Schoeman (1994) acknowledges some District Six-born personalities who became famous in the outside world. Mention is made of Abdullah Abdurahman (1872-1940) who served as a medical doctor, city councillor and Cape Provincial Council member, and many others (Schoeman 1994: 65). Only one paragraph is allocated by Swanson & Harries (2001: 77) to describe District Six as 'a hive of political activity.' Small and Wissema's *District Six* (1986) consists of an anthology of seven pieces of poetry and a photographic album of the architecture and street scenes during the days of forced removals. To describe the political turbulence of that time, they use the earlier names of Cape Town metaphorically: The Cape of Storms and The Cape of Good Hope. They immortalise the suffering and pain, using Jerusalem from the Biblical scripture and Troy from Greek mythology to elevate the symbolic value of District Six. Poignantly, they use images of children as witness and hope for the future. Small and Wissema (1986: 12) become the philosophers of hope by using themes like 'resistance, justice and inhumanity,' when they prophetically proclaim, long before the fall of white-minority rule that:

> We are climbing up, *up* / out of the rubble, rising / with a will, dear God / up! / from the rubble / (celebrate: / there's a miracle) - we are / rising up! / out of the rubble we are / rising up

It is noteworthy that the District Six Museum's commemorative event had a strong intellectual and cultural component that reflected the kanala spirit. Guests were welcomed and entertainment with a proverbial 'tafel' (table spread with free eatables, signifying generosity and hospitality to all) consisting of koeksisters, watermelon, cake and tea. The District Six narrative was theatrically performed by locals using storytelling, prose and poetry. Drawing on the collective memory of the historically oppressed, the event extended to the inclusion of forced removals beyond District Six. 'Whether it was Tramway Road in Sea Point, Green Point or Claremont or any other area within the city; For all of Cape Town February 11 [1966] is a very important date' (Southern Mail 2016). The Museum's event encapsulates the emergence a futurist imagination of a democratic South Africa. It emphasises that the land restitution process is more than the houses: it is about dignity, culture, and all the other rights that go alongside housing. Knowledge of past culture for the purpose creating a better future for the historically marginalised is empowering to navigate a better future (Appadurai 2004). A reconstruction and excavation of District Six's memory and history offer a new foundation to imagine a future which is home-grown, empowering and authentic.

The next section develops an alternative reading of District Six as a pedagogical and political text. It draws from known texts, stories and memory. It is an attempt to introduce a consolidation of achievements in the arts, humanities and science that can, potentially, be strengthened and expanded into a national discourse. Four overlapping sections identify District Six as birth place of the national democratic movement in South Africa, a place of intellectual and literary richness, a place of cultural leadership and excellence, and a place of institutional abundance, teeming with individual and collective talent in arts and culture.

'Changing' the past to re-imagine the future: A decolonised narrative of District Six

The literature analysed in this article predominantly presents a discourse of District Six that is infused with elements of primitiveness, inferiority and subordination. A Foucauldian lens explains knowledge as a social construction and explains how a shift in political power creates possibilities for the emergence of new discourse as regimes of truth. Jeppie and Soudien (1990) accentuate the need to confront the dominant biased discourse associated with District Six, head-on. Dudley (1990) suggests an alternative reading of District Six as the birthplace of the national democratic movement, rather than the 'slum of gangsters with an insatiable appetite for conviviality, alcohol and music' (Nasson 1990: 48). While the literature expounds the latter in great detail, the need to explicate the former discourse remains an unfulfilled imperative. What follows, are segments of an alternative narrative taken from existing literature and memory.

The following paragraph (Layne 1997: 4) provides an apt opening description that acknowledges District Six's diversity and sociopolitical context at the time of forced removals:

> In 1966 the district which started its existence as home to freed slaves and which grew into a multifunctional urban residential sprawl by the end of the 1940s, the district which was home to poets, stevedores, doctors, gangsters, choristers, domestic maids, wash women, jazz musicians, crooners, noisy children and quit ones, moffies, crane operators, opera singers and councilors, that district whose existence posed a threat to the Grand Apartheid machinations of the National Party and the city fathers in the late 1950s and which was situated on a prime piece of urban real estate . . . was declared a white residential area and cleared of its inhabitants over the next 16 years.

District Six was the birthplace of the Industrial and Commercial Workers Union, established in 1919 (Dudley 1990). From the premises of the Stakesby-Lewis Hostel in Canterbury Street, the National Anti-Coloured Affairs Department (Anti-CAD) movement was launched in 1943 (Dudley 1990). Equally noteworthy are Ottile Grete Abrahams and her husband Kenneth Abrahams, Namibians who became major role players in the liberation of their country. Ottile attended Zonnebloem College and Trafalgar High in District Six (Dierks nd). Other notable personalities who either came from District Six or had their schooling there include Hassan Howa (activist for non-segregated sport and president of the South African Council of Sports), Sedick Isaacs (mathematics and physics teacher who spent 13 years on Robben Island), Bennie Kies (law expert and anti-apartheid activist), Rahima Moosa (activist who, together with Sophia Williams-De Bruyn, Helen Joseph and Lillian Ngoyi, led the 20,000-strong women's march on 9 August 1956 to demonstrate against the Pass Laws). The Women's Living Heritage Monument, which includes Moosa, was unveiled by President Jacob Zuma on Women's Day, 9 August 2016 to commemorate the story of women's contribution to the liberation struggle (Brand South Africa 2016). Dullah Omar (politician and minister of justice) and Reggie September (trade unionist and member of parliament in the postapartheid period) acquired their political schooling in District Six (Trafalgar High School nd).

Writers and novelists born in District Six extend beyond La Guma and Rive but are mentioned

here as examples of what should become essential components of an alternative discourse – in the same way as Steve Farrah, Peter Abrahams and the Docrat brothers from Fietas, Pageview are part of a national decolonised narrative of South African history (Carrim 1990). La Guma, Rive and Small are associated with the 'protest and resistance movement' in literature of the 1950s and 1960s. Both La Guma and Rive attracted international academic interest and have become subjects of literary studies. When Alex La Guma, describes squalor and deprivations in his novel, *A Walk in the Night*, he uses metaphor to describe the savagery of apartheid and the prevailing socioeconomic conditions (Yousaf 2001). He describes the smelliness and unsavoury scenes in the slum of District Six, using metaphor to caricature the system of apartheid. In his *And a Threefold Cord*, La Guma writes about rain as a metaphor for the regime's relentless incursions into the lives of the oppressed (Yousaf 2001). Regrettably, the novels of La Guma are often referenced by liberals, literally, to support an argument of slum and crime, which misses the actual significance of his work.

Richard Rive was born in 1931 in District Six. He studied as a teacher, and wrote for magazines like *Drum* and *Fighting Talk*. In the 1960s and 1970s he studied in the USA and England, and became an internationally acclaimed writer and professor (Fundza nd). His stories, which were dominated by the ironies and oppression of apartheid and by the degradation of slum life, have been extensively anthologised and translated into more than a dozen languages. Rive is considered to be one of South Africa's most important short-story writers.

Not without controversy for accepting funding from the apartheid government, and mainly seen as part of the coloured community, South Africa's oldest amateur opera, ballet and theatre company, The EOAN Group, was established in District Six in 1933 (Roos 2015). From 1956 until the late 1970s, EOAN featured an active amateur opera section responsible for numerous arts festivals, annual opera seasons and tours throughout South Africa (1960 and 1965) and the United Kingdom (1975). Their repertoire included works such as Giuseppe Verdi's *Rigoletto* and *La Traviata*, Pietro Mascagni's *Cavalleria Rusticana* and others. *The Square,* by Stanley Glasser, is a depiction of gang life in District Six and was choreographed by David Poole, with Johaar Mosaval in the principal role (EOAN Group nd). Mosaval was born in District Six and became a world famous ballet dancer. He danced as a senior principal dancer for 25 years with the Royal Opera House in Covent, Gardens, London (Wilkinson 2006). It remains a historical injustice that Vera Gow's achievements as lead opera singer in the EOAN Group have not yet been given the appropriate consideration by cultural historians (The Presidency nd). Another artist of international acclaim who had to leave his country of birth is composer and musician, Abdullah Ibrahim (formerly known as Dollar Brand) – needless to say, this list is endless.

Many South Africans attained international status and represented their newly adopted home countries in international competitions but were denied the same opportunity in their country of birth. South Africa-born Precious Mckenzie represented England in the Commonwealth Games in Jamaica (winning a gold medal in the Bantamweight division, and awarded the MBE in 1974 by Queen Elizabeth II). Local District Six chemist, Rashid Domingo, achieved the same after he had

to leave South Africa because of blocked opportunities, based on skin colour. Domingo made major contributions to the medical field with enzyme research that made early detection of prostate cancer possible, and for which he was also awarded the MBE by Queen Elizabeth II (Williams 2015). Sadly, the average South African is oblivious of the achievements of these South Africans who, under normal circumstances would have become part of our national legacy.

An alternative discourse of District Six flows from the fruits of the many education and social institutions that shaped the cultural and intellectual architecture of the area. Twenty-two schools (including two high schools and two training colleges), churches, synagogues, mosques and institutions such as the Hyman Liberman provided a wealth of opportunities for residents to develop their talents (MacCormick 1990: 106). The list of South African sports people who should have earned national colours is unending. In the fields of soccer, rugby, cricket, athletics, snooker and so forth, countless were denied the opportunity to compete although they were amongst the best, nationally. Some of South Africa's first soccer and rugby clubs were establish in District Six. The first soccer team, Young Men's Own FC (est. 1917) and Roslyns RFC (est. 1882), the first black rugby club, were founded in District Six (District Six Museum 2010; Booley 1998). District Six was known for the Abed brothers, all five of whom were world-class sportsmen. Basil D'Olivera, Cape Town born England cricketer noted that Salie 'Lobo' Abed was, at his prime, the best wicketkeeper in the world (Odendaal, Reddy & Samson 2012).

Conclusion

In response to the research question, this article concludes that the selected texts and commemorative events intersect with at least four dominant discourses but deal with the alternative discourse only marginally. The dominant discourses have been shown to be political constructions that explain the marginalisation of authentic memories expunged from popular memory. Foucault's notions of archeology and genealogy expose the political nature of grand narratives that were symmetrical with the official political impulses of that time. Notwithstanding the appearance of slum, crime and gangs, which became an obsession of outsider scholarship, authorial subjectivities were exposed by contradictory statements and claims that were made to promote what Alvares (1991) describes as the colonial project, and Spivak calls epistemic violence against the subaltern (Zhaogua 2011). It is recommended that future scholarship adopts innovative critical theory to excavate and reconstruct the marginal discourses to correct the epistemological injustice of the past.

While the emphasis on literary critique focused on the role of outsiders, the extent that insiders fell prey to dominant discourses was not ignored. Insiders often became victims of an oppressive system that fed the public on political myth-making and propaganda. State censorship banned 38,813 books between 1962 and 1993, which took away freedom of expression and access to the best work and cultural contributions of their fellow citizens (Odendaal & Field 1993: iii). This notwithstanding, history has shown that apartheid could not resist the triumph of liberation that, ultimately, led to the dismantling of the apartheid state. To become innovative, and not just

reproductive in their cultural productions, it is recommended that insiders have to become aware of their pedagogical role and become critical when they engage historical memory in the creative arts.

The nearly unaltered consumption and reproduction of the colonial historiographical archive in the postapartheid era raises concerns about the slow pace of decolonisation. While the Rhodes Must Fall movement calls for a broad-based transformation of South African society, the case of District Six connects the local struggle to the national imperative for a reconstructed, decolonised postapartheid narrative.

Acknowledgement

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Reframing the quality education discourse via a capability analysis of Quintile 1 (poor) school communities

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Abstract

Quality education in South Africa remains a topical, controversial and contested territory. What constitutes quality education is misunderstood, misrepresented, oversimplified, overshadowed by the gains of access, improperly diagnosed or simply generalised because complex challenges in varying school contexts are often not considered seriously. There is evidence of overreliance on physical access as a measure of quality education, while what schools can or cannot do, can or cannot achieve, is neglected in quality education discourses in South Africa. This paper uses the capability approach as theoretical lens to underscore the need to pay attention to capabilities, freedoms, unfreedoms and conversion processes that determine what an individual school can or cannot do, can or cannot achieve with available resources in their journey towards achieving quality education. The paper links issues of class, race and justice to education by using the capability approach as a framework for reframing understandings of quality education.

Key words: quality education, Quintile-1 schools, capabilities, freedoms, conversion, poor schools, capability sets

Introduction

Considering that South Africa's mandate of universal primary education for all is now being realised (Modisaotsile 2012; Soudien, Motala & Fataar 2012; UNDP 2015), it is important to consider how access has assisted individual learners in different schooling contexts to achieve quality education. Although access to primary education in South Africa has been fairly in line with the Millennium Development Goals (Modisaotsile 2012; UNDP 2015), there is a major concern in terms of the ability of individual schools to convert that access into quality education (Soudien et al. 2012). A study of three poor primary schools in an informal settlement in Cape Town indicates that understandings of quality education in South Africa focuses more on physical access, while other significant markers that influence learner performance and quality education (contextualised challenges, learner wellbeing, the nature of teaching and learning, the kinds of resources in place, the capabilities stakeholders possess to convert existing resources into learner outcomes, and the kinds of support learners receive to achieve their aspirations, and so forth) are underplayed.

Poor (Q-1) schools are situated within a framework designed by the democratic government in South Africa after 1994 to categorise schools in terms of poverty levels of the communities in which they are located, as a gauge to allocating resources to the neediest schools and communities. As such, schools were classified from Quintiles 1–5, with Quintile 1 being the poorest, and Quintile 5 the least poor – with more resources allocated to the poorest schools and the least poor schools receiving the least resources. This model was meant to ensure that learners in the poorest schools are better supported in order to improve their circumstances and performance (Department of Education 2006).

However, this model of resource reallocation has not convincingly assisted poor schools to attain the expected level of quality education, consequently giving rise to numerous unanswered questions in terms of why poor schools are failing to perform despite the availability of resources, what quality education really means, how it can be achieved or if it is achievable in the case of South African poor schooling communities.

Seemingly, the criteria used to assess learner performance in schools does not take into account the importance of what schools can or cannot do with available resources in a holistic and sustainable way to attain quality education (Crouch & Mabogoane 2001). This implies that quality education in the South African context remains a debatable and contentious affair. The use of generalised and skewed tools in the delineation and measurement of quality education in South Africa has contributed to the relevance of local contexts and realities on the ground, especially those of poor school communities being undermined (Soudien et al. 2012). This obscures our understanding of what quality education actually means in the South African context. In fact, this has resulted in poor schools being labelled as underperforming and of poor quality. These allegations are prejudicial, considering the existence of context-specific challenges that undermine and compromise efforts made by these schools towards achieving quality education within their individual spaces. From the perspective of poor schools, quality education is better understood

from the perspective of capability enhancement or capability failure – when unfreedoms, freedoms, the conversion process and capabilities within individual contexts that determine what an individual school can or cannot achieve with available resources in their journey towards quality education are properly considered. Exploring the necessary theoretical underpinnings of quality education in South Africa, especially in poor school communities, would potentially provide a snapshot of the state of the country's education system in terms of quality education and the way forward. This paper particularly reimagines the quality education discourse in terms of a philosophical approach based on capabilities and functionings. This paper, therefore, employs the capability approach (CA) developed by Amartya Sen to unveil a plethora of unfreedoms and limitations on individual and institutional capabilities that prevent schools, in specific ways and contexts, from converting existing resources into achieving the desired quality education. The CA, via the concept of *capability sets*, is proposed in this paper as a framework capable of describing the nature of quality education in South Africa.

South African landscape of quality education

Quality education has different meanings and interpretations, based on context. However, its common characteristics include the nature of knowledge and skills acquired by learners (Ng 2015). In the view of Masino and Niño- Zarazúa (2016), quality education in developing countries can be achieved if there are appropriate interventions that carter for both physical and human resources and learning materials. This would also include practical policies that consider the preferences and needs of teachers, learners and the communities in which the schools are located, and the institutionalisation of policy interventions that engage the school communities in identifying and resolving contextual challenges (Masino & Niño-Zarazúa 2016). UNESCO (2015) concurs that, in order to achieve quality education by 2030, efforts should be made to empower teachers and educators, while taking issues of recruitment and training seriously, ensuring that teachers are professionally qualified, motivated and supported and, most importantly, based on the notion that institutions are well-resourced, efficient and effectively governed. According to UNESCO's EFA Global Monitoring Report (2005), quality education should cater for learners' cognitive development and should be able to promote those values and attitudes that nurture them to become responsible citizens. It should also potentially nurture the creative and emotional development of the learners.

In the view of Soudien et al. (2012), access and quality education in South Africa is simply rhetoric; hence, there is need for a proper interrogation of the concept. They suppose that, to arrive at a more holistic approach and meaning of quality education in South Africa, much attention needs to be paid to specific school contexts. Soudien et al. (2012) see access and quality education as inseparable and, therefore, recommend an expanded definition of quality education to include elements that complement access such as attendance, enrolment, progression at the appropriate age, achievement of learning goals, equitable access to opportunities to learn and a conducive learning environment. In the view of Taylor, Fleisch and Shindler (2008), issues relating to

accessibility to basic learning materials in classrooms also need to be taken seriously in any attempt to explore and understand the notion of quality education in South Africa. Looking closely at what individual institutions can or cannot do, can achieve or cannot achieve, with available resources or opportunities in an attempt to achieve quality education in terms of existing freedoms, unfreedoms and capabilities may, potentially, convey an array of capability failures or lack of capability enhancements. Therefore, focusing on such details may throw more light on understandings relating to quality education.

This is not to say that much has not been done in South Africa to ensure equitable access to education through various policy initiatives and strategies, which include an increase in the number of enrolments (Modisaotsile 2012), no-fee schools and the provision of resources to support poor educational institutions. That said, significant failure to take into account how these resources are utilised by learners within individual school contexts to attain the desired quality education obscures the notion of quality education per se (Crouch 2005; Fiske & Ladd 2006; Soudien et al. 2012). Also, failure to consider existing freedoms, unfreedoms and the capabilities possessed by those championing the processes of converting school resources into learner outcomes means obfuscating the meaning and goals of quality education. For example, school libraries that do not play the expected role of enhancing quality education (Spaull 2012a) unveil numerous complexities and challenges for both the learners and school administrators. Such libraries maybe beset by issues of access to these resources by learners in poor school communities, due to a lack of adequate library space to shelve books or a shortage of content-related textbooks. This validates the need to interrogate the impact of libraries in poor schools, especially in a case where there could be a well-stocked library but underutilised due to the inability of the school (because of insufficient finances, perhaps) to employ a trained librarian to assist learners. That learners are unable to appropriately access such a resource to fulfil their educational aspirations is worth looking into (Hartley 2006).

Dieltiens and Meny-Gibert (2012) and Christie (2008) suppose that quality education is likely to be viewed from a relative rather than an absolute perspective if the realities of inequalities that hinder quality education in specific school contexts are ignored. However, when quality education is viewed from an absolute perspective, freedoms, unfreedoms, capabilities, the conversion process and challenges embedded in individual school contexts are bound to be interrogated with seriousness, reinforcing the need for the use of the CA in attempts to understand the meaning and nature of quality education in poor South African schools.

With similar reasoning, Fiske and Ladd (2006: 97) see the kinds of educational policies instituted in South Africa since 1994 as 'race blind.' In their view, policy makers do not seriously consider the realities of racial disparities that often coincide, or are synonymous, with socioeconomic status (SES), and often negatively affect learner experiences in disadvantaged communities. The reality is that the educational aspirations of learners in poor school communities are influenced by their backgrounds in complex ways, with challenges from home often being unknowingly carried into classroom spaces where they directly and indirectly influence learner outcomes (Anderson, Case

& Lam 2001; Pretorius & Machet 2004; Fiske & Ladd 2006; Christie 2008). Clearly, the tendency has always been to focus on the gains of access, while ignoring those pertinent variables that evidently impact on quality education. Such approaches blur understandings of quality education and what it really means (Motala 2001).

Furthermore, Motala (2001) argues that, apart from the plethora of views and factors surrounding quality education in South Africa, it is important to note that change takes time; therefore, expectations of quality education from school communities that emerged disadvantaged from the apartheid era need to be considered prudently. From the perspective of Sen (1992), schools subjected to the historical ramifications of apartheid emerged, variedly, from apartheid and, therefore, would need different amounts of resources, both physical and human, and a longer time frame to attain expected education standards. This reinforces the need to design policies that are context-specific and friendly in order to offset the inequalities that have existed, and still exist, in poor schooling communities in order to achieve the dream of quality education for all (Fiske & Ladd 2006). The current one-size-fits-all school classification obscures the unfreedoms in individual school contexts that need context-specific approaches in resolving them. This reinforces the notion that quality education varies within communities and institutions for very diverse reasons. As such, there is great need to consider the role of freedoms, unfreedoms, individual and institutional capabilities in quality education discourses.

Schools in poor communities, based on specific historical influences, may need more than school resources to produce quality education. This explains why Motala (2001) emphasises the need to objectively examine the notion of school quality, taking contextual nuances of South Africa's history into consideration. Pretorius and Machet (2004) and Spaull (2012b) also reason that existing SESs, which are a product of the country's history, determine the levels of learner literacy in poor schools.

These parameters indicate the existence of a material and social divide within and between communities that needs to be addressed prudently to achieve quality education (Christie 2008). Yamauchi (2011) argues that quality education is spatially distributed with the tendency for good quality schools to be out of the reach of poor children, for multiple reasons. Although subsidies are used as a way of improving the circumstances of poor learners, the question of whether subsidies alone can guarantee quality education in poor school communities where challenges often run deeper than assumed, would be an ongoing discourse in South African education (Bojuwoye et al. 2014). Clearly, poor learners are excluded from enjoying the benefits enshrined in the Constitution in terms of quality education for all, due to the manifestations of context-specific unfreedoms. Consequently, Taylor, van der Berg and Burger (2012) argue that changes in the field of education should not be expected immediately, since the apartheid legacy is resilient and resistant to change. Therefore, incorporating the tenets of the CA in quality education discourses exposes those silent but salient factors that hinder individual institutions from achieving expected educational standards, much of which is linked to the ramifications of SES.

Therefore, ignoring the effects of SES means branding government's interventions towards

achieving quality education futile (Chisholm 2004). Also important is the fact that poor schools are ambitious to attain quality education, and the learners themselves have a passion for education, but their efforts are thwarted by inherited socioeconomic disadvantages of the past, which frustrate attempts to convert existing resources into achievable goals (van der Berg 2006, 2008; Gardiner 2008). This does not only raise difficult and complex questions concerning the precise meaning of quality education within the South African context, but it also indicates that quality education is far from attainable based on existing circumstances that manifest in many ways in poor schooling communities (Christie 2008; Maarman 2009; Pretorius 2014).

Furthermore, it can also be argued that SES contributes to the lack of parental educational support for learners in the form of household resources, emotional support, motivation and learning materials at home – all of which directly influence learners' abilities and potential to achieve at school (Soudien 2007; van der Berg 2008; Bayat, Louw & Rena 2014). These may continue to play a dominant role in shaping learner performances in poor schools for a long time to come, if not handled prudently. As such, Pretorius (2014) calls for a total turnaround strategy for the entire education structure, if there is any prospect to achieve quality education for all in South Africa.

Maarman (2009) further demonstrates the crucial role SES and learner backgrounds play in frustrating efforts towards achieving quality education for all in South Africa through an interrogation of informal settlement schools. Maarman cautions that SES has the ability to introduce new variables that are capable of derailing efforts put in place by the government to attain quality education. Using the CA as a theoretical lens, Maarman (2009) maintains that learners in informal settlement schools are subject to conditions that prevent them from making good use of available educational resources and opportunities at their disposal, further problematising the notion of quality education for all.

Based on the foregoing arguments, it is debatable whether the current education system actually prepares learners in poor schools for the unpredictable, ever changing and demanding global economy – considering that context-specific challenges influence everyday experiences, including education. Christie (2010) acknowledges that principals and teachers alike face constraints in their attempts to transform schools to the expected quality standards, irrespective of the amount of resources available. This further questions what quality education really means, and how it can be understood and achieved within the South African context, especially when poor schools are brought into perspective.

The irony is that when learners perform poorly they are allowed to progress for reasons other than academic competency to fulfil government's goals of universal access to schooling and equity, while ignoring the potentially negative implications of such directives on physical and human resources within individual school contexts (Munje & Maarman 2016). Such circumstances challenge learner experiences and aspirations, aspects that when combined ought to result to quality education.

Furthermore, the managerial capabilities of stakeholders in specific contexts hinder the attainment of quality education. In many cases, the school administrative chain is disrupted either due to

negligence, breakdown in communication, lack of collaboration or simply ignorance on the part of various stakeholders about their expected duties or how to effectively carry out such duties. Seemingly, they are unaware of the implications of neglecting their individual portfolios that ought to transform exiting resources into learner outcomes – perhaps due to the lack of the necessary capabilities to perform their duties (Bush et al. 2010; Itumeleng & Ldm 2014). For example, district offices are increasingly unaware of their responsibilities to schools and, likewise, school principals to heads of departments (HoDs), and HoDs to teachers (Munje & Maarman 2016). This causes instability within administrative machinery, putting government's efforts towards quality education at risk (Bush et al. 2010). Generally, monitoring and evaluation in such school communities are stifled, with adverse effects. This aligns with Taylor's (2011) view that South Africa's dream for quality education is situated in a tenuous space between resources, teaching and management capacity at each individual school.

Besides, Barnett (2014) reveals that learner performance and the notion of quality education in poor schooling communities is impeded more by the lack of capabilities enhancement and capabilities failure and existing unfreedoms, than the lack of resources or the formulation of the necessary policies aimed at promoting quality education. Barnett (2014) argues that, since the erosion of the notion of quality education is caused by existing agencies, there is a need to pay closer attention to the capabilities of stakeholders empowered to convert existing resources into learner outcomes, and the proper implementation of monitoring and evaluation processes and procedures of existing policies by the Department of Basic Education (DBE). Barnett (2014) also suggests that this approach would give the DBE an opportunity to understand existing unfreedoms and capability limitations within individual school contexts that hinder the conversion of existing resources into quality education.

Therefore, quality education in the South African context can be better understood from the perspective of capability enhancements or capability failures. Hence, applying capability sets would provide a better understanding of what schools can or cannot do with available resources, and why they achieve or fail to achieve within individual contexts.

The capability approach

The capability approach (CA), which is a central constituent of the writings of Amartya Sen, is underpinned by the following constructs: capabilities, functionings, conversion, freedoms and unfreedoms. According to Sen (1992), capabilities are the abilities or opportunities one has to choose the kind of life you have reason to value. For Sen (1985), functionings represent the actual achievements, that is, what a person can do or can be. As such, a closer examination of one's achievements would possibly reveal inequalities that exist in peoples' freedoms or ability to achieve (Sen 1992). Although accumulation of resources is important to human existence and growth (development), what one succeeds in doing with the available resources should be of utmost importance (Sen 1985).

The CA approaches and understands the nature and causes of poverty and deprivation from a

standpoint that differs from the mainstream assumptions that resources equal achievement (Sen 1992). These mainstream approaches ignore the possibilities of challenges that may be unique to each context. As a result, Sen (1992: xi) asserts that it is not advisable to assess or compare two institutions or persons based on the premise that "all men are created equal," while ignoring many important, salient variables that create the possibilities of other inequalities within and between spaces. These variables may include physical and mental abilities of individuals, age, sex, social background and environmental conditions (Sen 1992, 1999).

Therefore, two persons or institutions should not be compared, based on the amount of commodities (resources) at their disposal, but on what they actually succeed in doing with the available resources within their individual spaces. Sen (1992, 1998, 1999) thus asserts that, the possession of resources does not guarantee an improvement in the well-being of an individual or a group of persons because of the variances in spaces. Notably, how individuals and institutions make available resources useful to themselves is an important point of departure, usually ignored in education discourse and in the analysis of performance in educational spaces, especially in the context of poor schools.

In Sen's view, a person's ability to transform or convert primary goods or resources into achievements or valuable functionings is important when evaluating well-being. It is clear that educational institutions, even when presented with similar amounts of resources, experience varying levels of learner performance, based on contextual challenges or unfreedoms. Freedoms relate to peoples' ability to make valuable choices that allow them to help themselves and others, without constraints (Sen 1992, 1993). In the case of this study, the lack of stationery, the lack of access to libraries and computer laboratories, teacher unprofessionalism and selective teaching contribute to limit learner freedoms to learn and pass, especially when learners are sent out of the classroom during lessons. Therefore, unfreedoms are any limitations or hindrances on human capacity or ability to perform a desirable activity or achieve intended goals (Sen 1992; Terzi 2005).

Methodology

A qualitative research methodology (Creswell 1998) was used, involving interviews, focus groups and classroom observations with Grade 7 learners, teachers and principals in each of three primary schools. Different sets of questionnaires were administered to the learners, teachers and principals. While focus group interviews were conducted on different occasions with learners and teachers in each of the schools, the principals took part only in individual interviews for logistical and administrative reasons. Observations were also carried out in all Grade 7 classrooms in all three schools. Classroom observations created opportunities to obtain certain critical data in natural settings and also provided an opportunity to triangulate data gathered through questionnaires, and via individual and focus group interviews. Repeated observations were carried out, which increased the validity of the findings (Merriam 1998). Considering that the focus of the investigation was to understand the nature of performance, learner schedules and

report cards were also analysed to clearly understand the reasons and nature of progression obtained in these schools, using the CA as a point of reference.

The research focuses on three primary schools in an informal settlement in Cape Town, selected based on their location in a high-level poverty area, their close proximity to one another, having learners with similar experience, receiving similar amounts of resources and supports from the government, and all being classified as Q-1 schools (Fleisch, Shindler & Perry 2008). It could, therefore, be assumed that these schools would exhibit a similar performance pattern, given the similarity of the above contextual factors – which provided an opportunity to test the assumptions of the CA. The CA considers individual spaces of schools, the capabilities of all role players, and the existence of freedoms and unfreedoms as fundamental in influencing the performance patterns of schools (Sen 1992, 1999). It was, therefore, important to use the CA to investigate learner performance in these schools in order to understand the nature and reasons for variances in performance and the implications for the quality education discourse.

Understanding quality education in a Quintile 1 (poor) school community via capability sets

Capability sets are criteria used to assess and determine what a person or an institution is able to do and be. The tenets of the CA revolve around the diversity of human beings, which, according to Sen (1985, 1992), plays a dominant role in our understanding and assessment of equality and inequality. Sen (1992) argues that inequality in people's opportunities cannot, with any accuracy, be determined by the amount of income or resources at their disposal because what we can and cannot do, and what we can or cannot achieve, is not determined solely by incomes or resources alone – because our physical and social characteristics contribute to construct our present and evolving identities. Since humans possess different levels of capabilities, different efforts on the part of us and others are required to attain certain levels of achievement. The CA constructs are, therefore, relevant in poverty-related analysis. Capability sets include interpersonal and inter-social variations (the extent and implications of personal diversities), relationships between primary goods and well-being/freedoms, systematic group contrasts, and spatial inequalities (Sen 1992: 27-28). These capability sets can reveal the nature of quality education in a selected poor school community.

Interpersonal and inter-social variations/human diversity

According to the CA, people have different abilities to achieve and, therefore, will see and do things differently. These abilities determine how individuals transform (convert) available resources or primary goods into achievement – what Sen (1985) calls the *conversion process*. Interpersonal variations and inter-social variations are related, and find expression in school quality because it vary in terms of learner contexts and can, therefore, be understood differently in the context of Q-1 school communities. Learners at the selected Q-1 schools varied in terms of how they behave and pay attention in class, a product of their backgrounds that, in turn, affects the

ways in which they see education, learn and perform. Backgrounds also determine the level of learner motivation in the classroom, and how they respond to homework. The level of motivation contributes to indiscipline and disruptive behaviours that are likely to affect the teaching and learning process, which further reduces freedoms to learn and to pass and, ultimately, generally inhibits learner capabilities within the classroom – with an untold impact on the quality of education.

Furthermore, Sen (1992) argues that the existence of diversity influences individual or institutional abilities to achieve or translate existing resources into what they or their community values. Within the quality education discourse, this underscores the need to understand why schools progress differently even when they possess similar resources and are located within the same communities. This idea is embedded in the responsibilities and behaviours of individual teachers in areas such as classroom management, which impacts on school quality in terms of the quality of education delivered, often reflected in academic performance.

Our findings also reveal how different teachers view happenings in the classroom. Some failed to acknowledge learner challenges in classrooms, and taught in unconducive learning environments in opposition to policy promulgations and professional expectations; others physically forced learners out of the classrooms without interrogating reasons for misbehaviour, clearly showing that individuals view and react to situations differently. It can, therefore, be argued that teacher actions that were, in most cases, uncalled for further deepened learner challenges, compromising their achievement levels and jeopardising the collective journey towards quality education.

Likewise, our findings unveil the inconsistent roles principals play in coordinating, monitoring and evaluating teaching and learning activities in individual schools and classrooms. While some principals often wrongly assumed that certain duties fell within the prerogatives of the HoDs, others were unaware of how some critical educational activities in their schools and classrooms were being run – due to the fact that those in charge did not possess the necessary capabilities. These principals were defaulting on their responsibilities to be aware of, and to identify and deal with the diversity in human capabilities in their individual institutions, a dereliction of duty that further frustrated efforts on the part of learners to achieve quality education.

Additionally, the management, monitoring and implementation of elements critical to delivering quality teaching, such as lesson planning, were inconsistent. Lesson planning, an important tool to achieving quality education, was, in some instances, monitored and evaluated by principals only after the lessons had been presented, which, in terms of constructive reflection, questions the implications of lesson planning on quality teaching and learning. Some teachers took advantage of the absence of proper monitoring and quality control, thus denying the opportunity to reflect constructively on their practice, and also depriving learners of an opportunity to acquire quality education. There was no evidence of principals playing a mediating role to ensure that defectors were brought to book. As a result of poor management in such schools, syllabuses were never completed, further deepening learner unfreedoms and holistically reducing the likelihood of attaining quality education.

Systematic group contrast

Systematic group contrast finds expression in learner performance and quality education when, related to SES, the role of parents (education and job dynamics), role models, selective teaching, and the quality and quantity of resources in poor school communities differ from what applies in other communities. As such, these characteristics vary in terms of contexts and, therefore, have different meanings, understandings and implications within specific schools and communities. Clearly, learner SES compromises their educational chances given that as home challenges are likely to be transported into the classroom spaces, directly or indirectly, requiring additional effort on the part of teachers to assist them to perform well. Data gathered shows that SES determined the way parents perceived and responded to educational matters, further compromising learner freedoms, and frustrating efforts aimed at achieving quality education.

Since selective teaching was a common phenomenon in the schools under discussion, syllabuses were often not completed. Hence, learners accumulated challenges as they progressed to the next grade, especially as class examination were based on what was covered, and progression is not solely determined by academic competencies. Consequently, learners were also insufficiently prepared for national examinations such as the systemic testing. Clearly, the discourses and the debates about quality education in poor schools are more complicated than is generally assumed, due to the existence of unfreedoms that are not only unique, but are sparingly and infrequently considered.

Relationship between primary goods and well-being/freedoms

According to the CA, the amount of resources available to a person or institution does not automatically determine the person's or institutional well-being because certain capabilities are needed to convert these resources into outcomes; this is determined by contextualised freedoms and unfreedoms. The CA, therefore, refutes the mainstream assumption that resources equals achievement (Sen 1992). As such, it is important to consider the conceptual gap between resources that lead to freedom to achieve and the nature of the achievement itself. Understanding these factors would assist in reframing the quality education discourse in South Africa, considering that more attention would be paid to the reasons schools do or do not attain quality education, in spite of existing resources. The inherent complexity in the relationship between available resources and achieved functionings in terms of school contexts has the potential to provide a different approach to understanding quality education in poor schools.

For example, the availability and utilisation of stationery, books, libraries and computer laboratories indicates the existence of a gap between output (learner outcomes) and input (resources) – a gap that ought to define quality education. The acute shortage of stationery in the classrooms in this school community introduces various capabilities limitations for the learners and teachers. Also, in many instances books, were underutilised – either because there was no library space available to shelve them for learners to access, or there were no trained librarians to assist them to do so. Apart from reducing learner freedom to achieve, these setbacks also undermine efforts being made to attain quality education. In the domain of computers, findings

showed that learners could not gain the necessary knowledge because, in some instances, computers had been stolen (due to the crime-ridden nature of the community). In others, well-equipped computer laboratories were being intermittently used because of frequent breakdowns and a lack of funds for repairs, thus, depriving learners of an opportunity to develop the necessary skills to study for examinations and to do assignments and projects. These deprivations have a negative impact on learner capabilities with resultant consequences on quality education.

Clearly, resources may be readily available in poor schools, but may not adequately translate into quality education for diverse reasons, often unique to such communities. This demonstrates that people's freedoms to use available resources, and abilities to convert these resources into quality education, varies from person to person, community to community, and from school to school and, therefore, should be viewed and defined uniquely – based on context. To explore and understand the nature of quality education in South Africa objectively, one requires a careful approach that appreciates the existence of challenges and unfreedoms in varied school contexts.

Spatial inequalities

Sen (1992: 23) stresses the importance of context in attaining quality education: 'The need to face explicitly the choice of space is an inescapable part of the specification and reasoned evaluation of the demands of equality.' The existence of different spaces and contexts affects the way in which incomes, resources and primary goods are converted into achievements. Social inequalities can therefore be expressed in terms of learner progression because its application varies in the context of poor schooling communities, based on the particular prevailing dynamics at, and the infrastructure of, these schools. Learner 'progression,' although formalised in the national education policy (DBE 2013) as friendly and beneficial, means different things for different people in different contexts because its nature and implementation varies in terms of contexts. This opens up learner progression to different interpretations in poor schooling communities when viewed in the context of quality education.

Although the school progression policy (SPP) is a national policy and relevant in all schools, its application in poor schools is not consistent and varies in different contexts due to unfreedoms that are sometimes unique to a particular context, adding to the inadequacy of efforts by schools to implement the policy (Munje & Maarman 2016). This study shows that the cohort progression of learners, although intended to ensure that learners progress at the appropriate age, represented more challenges to learners in poor schools than in other schooling communities, because of its impact on their capabilities and abilities to perform. This is exacerbated by the lack of a smooth coping process for learners during their transition, as specified by the policy, thus posing yet another question in terms of the notion of quality education in this context. Seemingly, the lack of a well-thought-out coping process (Munje & Maarman 2016) on the part of the schools as theoretically expected by policy makers means learners are bound to perform more poorly than they had done in the previous grades or phases (also see Matiwane 2018). Apart from the lack of a proper structure and implementation strategies, the policy suffered from varying interpretations

and implementation strategies by various teachers and schools in this community. These lapses contributed to jeopardise the delivery of quality education that is, in theory, the key objective of the SPP.

Recommendations

Clearly, the above discussions indicate that existing challenges in poor schooling communities that compromise quality education are exacerbated by the lack of capability enhancement (or by capability failure), rather than by the lack of the necessary resources. Sen (1999) emphasises the need to develop and enhance human freedoms in order to achieve, and also the need to pave the way to overcome existing challenges in our societies through capacitation. The amount of resources allocated to each school should not be based on rigid models that strictly follow the quintile system (Walker & Unterhalter 2007) but, rather, be based on an adequate and objective evaluation of challenges facing each individual institution and schooling community (Sen 1999). In addition to providing resources based on specific needs, the capabilities of those in charge of converting these resources into learner outcomes need to be developed – to enhance the necessary freedoms that would guarantee the desired quality education (Walker & Unterhalter 2007). Additionally, an evaluation of the specific needs and challenges of each individual schooling community prior to resource allocation would likely unveil the unique challenges and needs of various schools – even where schools are classified within the same quintile, located within the same community and have learners with similar backgrounds. As such, interrogating, for example, why libraries or computer laboratories in some poor schools do not function or provide the expected service or impact within the institutions or communities might provide crucial information with regards to the unique predicaments of poor communities, and facilitate the journey towards quality education for all.

As such, Walker & Unterhalter (2007) emphasise the importance to expand funding policies beyond simply providing physical resources to schools. This is because learners are likely to import unfreedoms from home into the classroom, with negative repercussions that need to be recognised and addressed differently (for example, poor schools may require resident social workers and psychologists as part of resolving unfreedoms imported from homes) in order to avert negative impacts on learner performance.

Also, as part of process to boost the conversion of existing resources into learner outcomes in poor schooling communities, the capabilities of stakeholders (circuit managers, principals, HoDs, teachers and trainers) could, possibly, be enhanced through ongoing developmental programmes and workshops. Encouraging and facilitating collaborative engagements amongst and between various stakeholders could boost the journey to dealing the challenges of poor schools and paving the way for quality education. In such circumstances, lines of communication would be opened to make it easier to identify, understand, access and deal holistically with the needs and challenges of individual schools, in what Sen (1999) calls *participatory capabilities*.

Finally, it would be beneficial for the DBE to earnestly intensify its monitoring and evaluation

mechanisms if quality education must be achieved, especially in poor school communities. Monitoring and evaluation would give the DBE an opportunity to immerse itself in the daily lives of schools and to understand not only the capabilities of stakeholders, but the unique challenges and needs of individual schools and their learners.

Conclusion

Although reasonable attempts have been and are being made to improve quality education in South Africa through various programmes, strategies and policies, practicalities in poor school communities suggest that education could be resistant to these efforts. While notable and uncontested success in terms of educational access has been achieved in poor schools, it is clear that the translation of this access into quality education remains contested and ongoing. This paper suggest a critical relook, not only at the quantity and quality of resources available to each poor school, but also at what schools are actually able to or not able to do, able to or not able to achieve with those resources in terms of converting them into learner outcomes. This approach would assist in clarifying why certain poor schools are performing better than others, even when located in the same locality and enjoying similar support from the government. It is, thus, assumed that this discourse on quality education has added (although not necessarily a new dimension) to basic understandings of educational rights in the new South African schooling landscape given that the temporality of education underlies the development of the country. The paper links issues of class, race and justice by using the CA as a framework for reframing our understanding of what constitutes quality education, and how it can be genuinely understood and achieved in the context of poor schools in South Africa.

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Furlong, J & Hagger, H. (2006) *Review of Initial Teacher Training Provision in Wales: A Report to the Welsh Assembly Government* [online]. Available at www.learn.wales.gov.uk/scripts/ [accessed 4 March 2008].

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