Philanthropy, Scholarships and Student navigations in a changing South African educational landscape.

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Abstract

This dissertation explores the intersection of public education, philanthropy, and private sector funding in South Africa, and the different ways that students that receive scholarships via private funding navigate their respective educational spaces. The discussion focuses on how debates on scholarships, provided by philanthropic organisations, play out against the larger landscape of public-private educational partnerships in South Africa, and links that to the changing form of philanthropy in South Africa.

In doing so, the dissertation introduces the voices and stories of 22 scholarship recipients scattered across the South African educational and geographical landscape (born and raised in 7 different provinces). This offers opportunities to tease out the different connections between philanthropic contributions and public education, and to question the growing influence of public-private partnerships and their stakeholders on the ways that public education and its role is conceptualised in South Africa.

The goal of the dissertation is to highlight some implications that philanthropic scholarships provide for marginalised students within public institutions in South Africa, and the implications that they may have for the public education system in a context where global and local private interests have a firm agenda vis-a-vis the reconfiguration of overall public education systems.

By engaging with the lived experiences and stories of 22 students receiving scholarships, the dissertation casts a spotlight on some of the opportunities, contradictions, struggles, and constraints that students within philanthropic public-private partnership spaces in South Africa often confront.

The dissertation utilises the 3R framework (redistribution, representation, recognition) of Nancy Fraser, to consider some of the nuances, conflicts, and challenges that private philanthropy seems to bring to current debates about public schooling. The goal of using these is to tease out how emerging new pathways and approaches within the public-private educational domain may change how education provision for students in challenging and marginalised contexts is reconceptualised over the 21st century.

Declaration

I, Helen Day, declare that this thesis is my own unaided work. It has not been previously submitted in whole, or in part, for the award of any degree at any other university. It has been submitted in partial fulfilment of the requirements for the degree of Master of Education at the University of Cape Town.

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Signed:

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I am thankful to my family, particularly my husband, whose patience and encouragement have motivated me during this process. I would be remiss in not mentioning my friend Angelika Snyders for our weekend working sessions, extensive conversations on our topics, and overall moral support.

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The Rationale for the Project

He responds: You and I are two masked authors and two masked witnesses
I say: How is this my concern? I'm a spectator
He says: No spectators at chasm's door ... and no one is neutral here.
And you must choose your part in the end
(Mahmoud Darwish, "I Have a Seat in the Abandoned Theatre")

In the extract of the poem '*I have a seat in the abandoned theatre'* above, Mahmoud Darwish reminds critical readers and authors that there are 'no spectators' and 'no neutrals' in our current worlds, and that in every context they need to take critical standpoints and positions that shape what they engage in, and what they see.

When I first set about examining various issues within the philanthropic private sector in which I am employed, I needed to immediately confront my positionality, my intentions, and my views about the role of private educational philanthropy in South Africa. This came with a significant level of discomfort.

I was firstly confronted daily in my work sector by colleagues and attached educational and institutional infrastructures that are arguably spurred on by good intent and people that have a fair (albeit limited) understanding of the different struggles that South African students have to confront as they seek access to various educational opportunities and services. The majority of colleagues in the private philanthropy space were, to my mind, well-meaning and well-intentioned.

I was, however, also keenly aware of the many systemic and structural challenges that confront the majority of students in South Africa and how difficult it is for most students to access opportunities that allow them to position trajectories of sustainable livelihood. I was deeply mindful of the very limited human agency that students can exhibit when confronted by the obstacles and challenges that pepper the overall South African educational landscape.

My discomfort thus lay in how I projected the work and contribution of private philanthropy in South Africa in relation to the experiences of students from entirely different social and geographical contexts and the countless harsh realities that many of them have to experience daily.

My discomfort became even more pronounced when I engaged in debates around private philanthropic educational provision and the power relations that lay within larger public-

private educational initiatives. The question that troubled me was how this played out within the lives of the different students provided with scholarships to pursue their various life trajectories.

The Mahmoud Darwish poem extract helped me to position my discomfort and acknowledge from the outset that different contexts shape how students approach learning and opportunities; contexts that students have little control over. This standpoint is mostly lost within debates of public-private education provision and my starting goal in the project was to try to show the complexities that students that receive scholarships have to confront when they set about overcoming often damning life challenges.

Chapter 1- Introducing the main debates

Education as a system of provision and the nurturing of children is imploding across the world. This is so amidst growing global inequality and rapidly increasing poverty, which became ever more evident during the Covid-19 pandemic of 2020 to 2022.

Education remains however one of the only ways in which social mobility and the possibility of changing levels of inequality and poverty continues to be imagined. Robertson and Verger (2012: 12) point out that this is so because current dominant global opinions tend to position the tackling of global inequality and poverty as requiring a deliberate focus on education, where more significant investment in education is seen as resolving the developmental challenges relevant to different geographical and economic contexts. They assert that dominant opinions are mainly guided by a neoliberal political agenda that target the struggles of state systems and seek to undo them. This neoliberal position has been helped by the worldwide recession and the attempts in different country contexts, when trying to increase access while holding on to quality education that address different individual needs, to find alternative and sustainable ways by which to recover from spiralling inequality and, in recent times, the effects of a devastating pandemic (Robertson and Verger, 2012; Robertson, Mundy, Verger and Menashy, 2012).

Authors like Verger and Bonal (2012) and Mundy, Green, Lingard and Verger (2016) point out that current approaches and positions are quite different to the older neoliberal or social democratic forms of education provisioning of the 20th century. These, they say, were driven by the views of international policy makers and world organisations like the World Bank and the International Monetary Fund (IMF) that were focused on connecting poverty alleviation, regional development and employment strategies in deliberative ways. The goal of organisations like the IMF and the World Bank was to utilise the various global think-tanks that generated the Millennium Development Goals (MDGs) and the Sustainable Development Goals (SDGs) for education, and to organise policy thinking about poverty and development in ways that achieved particular targets for different contexts (Verger & Bonal, 2012; Mundy et al., 2016).

Mundy et al. (2016) suggest that what has changed in the 21st century has been the extent to which ‘educational success’ has become a proxy for economic competitiveness, added to the emergence of new non-state (systemic) actors that have come to play a quite prolific role in different education spaces. These two developments have led to a serious re-visioning of the

role of the modern state in the education of the majority of public school students, and a questioning of the commitment of the modern state to the protection of the well-being of the majority of students in public schools (Robertson & Verger, 2012; Robertson et al., 2012). In noting this, they describe the contemporary 21st century moment as the pointed privatisation of public education. In that regard, "*the privatisation of education is (seen as) the process by which a growing proportion of the education system is owned, funded, or operated by non-state actors* (Walker, Taneja, Abuel-Ealeh & Pearce, 2016: 16).

Unlike debates of the 1980s that focused on the form and shape of the privatisation lobby, what changed considerably in the neoliberal re-envisioning of social and political policy thinking in the 2000s has been the ways in which private organisations have envisaged contributing to the idea of 'quality education for all'. Private providers in the 2000s have tried to enter the public education space by increasingly suggesting that they can 'significantly assist' in the offering of quality education to students from marginalised communities. And in attempting to play this bigger role within the education sector, private providers have targeted different kinds of market mechanisms to open up alternatives sources of education provision by which they can do so (Zajda, 2006: 9; Robertson et al., 2012: 12).

The targeting by private providers of 'public education spaces' has been helped by modern state systems struggling to finance public education institutions and their upkeep in the 2000s. Confronted by deficits and a projected funding model that recommended streamlining public services across different sectors (health, correctional services, welfare) from the early 2000s, the focus of state education systems was on tightening services and cutting back on various psycho-social initiatives that were not 'paramount to education performance targets'. However, since 2015, and later as a consequence of COVID and its impact, modern state policy thinkers have increasingly begun to entertain the idea of partnerships with private providers as a way of getting more funding into the public education system and helping the state reduce its public funding challenges and responsibilities.

In South Africa, for example, a variety of models have emerged from this 'more open' stance of the state education system to partnerships with different non-state providers. These have included giving more opportunities and support for 'private schools' targeting low-income communities (Curro schools), providing support to religious entities to expand their religious schools provisioning, encouraging more online education services as a way of capturing those at home with access to electronic support services, developing partnerships between public education institutions and designated private providers (PPPs), and offering support to non-

governmental organisations (NGOs) and education philanthropies. The purpose of doing so has mainly been to access alternative sources of funding to what is currently available, arguably as a way of offering educational services to the larger number of students within the overall system.

Within this newly created or newly fostered environment, non-state actors have gained strong leverage in defining the concepts of public education and "quality education," as well as determining the state's responsibility in catering to modern state youth subjects. Thus, what initially might have started as endeavours to achieve various local or national targets, these new initiatives have grown over time into much bigger enterprises and ambitions with global incentive (Rose, 2007: 47, Draxler & Steiner-Khamsi, 2018: 24).

Many of the so-called 'new initiatives' are built on older long-standing traditions or provisions. For example, in South Africa, education philanthropies have a long history of provision and intervention and have been one of the many non-state actors that private enterprise has sought to support to play a bigger role in education debates and provisioning.

Education philanthropies burgeoned in South Africa in the 2000s and have come to influence in important ways how the public education system is currently being conceptualised and reconstituted. Defined by Fernandez (2011: 14) as "*voluntary giving, voluntary service and voluntary association for the benefit of people, the public good, and the environment"*, philanthropy is distinguishable from 'charity' in that the latter is understood to offer *"immediate relief"*, while the former is understood to be a "*long-term commitment to building the capacity of people, facilitating social change, and promoting sustainable development".*

As such, South Africa's long history of philanthropy (explored in the literature review) can be seen to have historically contributed to fostering alternative forms of educational thinking and learning, resistance to apartheid, and the uplifting of adult and non-state student learning and development. This is what recent policy shifts were hoping to rely on in giving education philanthropies more access to public education institutions.

In later chapters it is shown however that over time many of these philanthropies have come to serve as a conduit for 'the private' to engage more closely in the educational landscape, and in particular to serve as a vehicle by which public-private partnerships (PPPs) have come to thrive. As will be discussed in later chapters, the historical background of many philanthropies, with their reputation of non-financial interests and their overall level of trust in the public education system, brought with it a belief that PPPs could operate within a discourse and logic

of care and not be overly motivated by profit-making. But this repute has been sorely tested in the current commodified marketplace, with tax incentives bringing a new dynamic to philanthropic intentions, coupled with the temptation of high levels of new income and funds that private enterprise has suddenly made more available.

This has immersed current philanthropic participation within two types of discourses, namely that of *care* and that of *profit*. The former has focused on helping those that need urgent assistance, while the latter has insisted that institutional sustainability requires a form of profit-making to keep initiatives 'afloat'. Ironically, both discourses are framed by the need for an overall output, are driven by what is referred to as 'performance indicators', and incorporates a vocabulary that insists on levels of financial management and oversight that will ensure that the funds 'are spent in the right way'.

Since 1996, the shift in perspective towards institutional sustainability and the inclusion of philanthropy in education policy frameworks has resulted in education philanthropies serving as a conduit on the boundaries of public and independent schools. They have also offered a 'dialectical bridge' and 'grey space' for the creation of a 'new form of policy thinking and educational mindset' aimed at meeting the needs of students who would otherwise be denied opportunities or access to a supposedly 'quality education'.

On this canvas, the current project sought to understand student educational experiences in South Africa and how student experiences at 'ground level' reflect bigger debates on issues like social mobility, poverty and individual development. By focussing on the experiences of a set of students that criss-cross geographical spaces in South Africa, the dissertation seeks to illustrate the different challenges that students experience at local context levels, and to conceptualise what this may mean for a changing educational landscape and the differing emerging approaches to educational provision and student investment.

More specifically, the dissertation focuses on the scholarship programme of one designated *education philanthropic organisation* in South Africa, whose recipients attend public education institutions. It zooms in on the experiences of these scholarship students to tease out many of the questions and debates noted above.

By focusing on the backstories of many of the students funded by the educational philanthropy as they occupy and experience the space of being a scholarship recipient, the goal is to show both the institutional and systemic reprograming (and scarring) of public education students

and the important contributions that the scholarships could make to the life trajectories of the different students.

The goal of the above approach is to use the different student experiences and life outcomes to ask questions about the literature on public-private provision and their tensions. Do scholarships, provided by education philanthropies, make a difference in the lives of students that would otherwise not have access to funding? What are some of the ways in which the scholarships change the lives of such students? Does the existence and provision of such scholarships within the public education system change the nature, outlook and discourse of the sector? Would the further expansion of education philanthropic initiatives in the public education system open the way for the 'full privatisation of the public system'? Would this not further alienate and exclude students that historically have had limited access to education and life opportunities?

For the dissertation a set of interviews was conducted with 22 scholarship students from across the South African educational landscape; with lengthy backstories compiled for each of them. It was found however that to address some of the bigger questions expounded by the dissertation, the stories themselves could not be captured as wholesomely as I would have been liked. The dissertation has a limited word count and because the initial intention had been to utilise their stories to illustrate challenges within the sector, their individual stories could not be fully explored. As such, the findings chapter is thematically confined to address the main common issues that criss-cross the various stories, as noted in the previous paragraph.

A concern however was that the 'student stories' in Chapter 5 would be completely overawed by the bigger conceptual and theoretical debates about education in the contemporary neoliberal arena, and the main goals outlined for the dissertation. A more tangible and humanly 'feel' of what the project seeks to achieve was thus needed. The text in the rest of the chapter focuses on the backstory of one of the students interviewed for this study, and recreates, at this early stage, for the reader some of the overlaps and challenges that different students confront when they enter the world of scholarship recipient and education philanthropy participant.

In telling the story of Melokuhle the chapter introduces some key themes and experiential dimensions tied to getting a scholarship, being linked to an education philanthropic organisation, and the changing of a life course. According to data published by the World Bank, almost 33% of South Africa's population lives in rural communities, with many according to

recent StatsSA data facing extreme poverty. Melokuhle's story is instructive as to some key contradictions tied to philanthropy, scholarships, and education provision in the country.

While the story offers an initial grasp of what the overall dissertation seeks to illustrate and analyse, it also serves to *humanise*, *complexify*, and *identify* early on important elements of the lives of scholarship recipients operating in the grey space of public-private engagement in South Africa.

The story of one scholarship student

Born to a young mother, Melokuhle spent the first few years of his life being raised by his grandmother in a rural village in Limpopo. He started his schooling in a nearby village school but after he completed Grade R he moved to the city of Johannesburg to live with his mother. In grade 6, a teacher chose a few students to write an entrance exam for a scholarship that provided opportunities for students from his township. If successful these students would attend a Saturday school in grade 7, and the top performers would be offered bursaries for a 'higher-performing' high school. Although Melokuhle was chosen for the 'entrance tests' he didn't do well enough to get the scholarship. This was a big blow to him and he thereafter worked hard in his grade to do better with the goal of reapplying. In the meantime he continued attending a no-fee high school close to his home.

At the second attempt Melokuhle was awarded the scholarship, which allowed him to access a different school in a different area to complete his grade 9 year. By this time Melokuhle had made conscious decisions about his education - what he wanted to work towards, and what he was willing to compromise to achieve that. With his mother's encouragement he chose to do Afrikaans FAL instead of his African home language. She wanted him to try something different and told him that as she knew a little Afrikaans she would help him make sense of it all.

Unfortunately, in March of his grade 9 year, Melokuhle's mother passed away. This devastated him and would normally have crippled a young child's spirit. Melokuhle however was determined to follow his mother's advice and encouragement and not lose his bursary. Instead of returning to his grandmother in rural Limpopo, he moved in with an uncle's family in the city. A key challenge was that his uncle lived a fair distance from where he previously lived and where his school was located.

Melokuhle was steadfast in staying in Johannesburg and with the scholarship for two reasons: firstly, he did not want to lose access to something that his mother had fought so hard and sacrificed for him to get the scholarship, and secondly he wanted to avoid the 'destiny' that

many of his family seemed to be stuck with, namely forms of manual labour that left scars and traumas on all of their bodies. He did want to suffer a fate similar to that of other family members. But he also had a new-found belief that he had the required skills and understanding to succeed in the new school to which he had been allowed to enter. In that sense he felt a sense of gratefulness for being clever enough to have a bursary and not wanting to give that up. Melokuhle describes this moment as the start of his educational journey.

In the same year, his uncle lost his job and then the house they lived in, leaving them homeless. Needing to stay in a specific area in order to access the bursary, his grandmother and family arranged for him to live in a shack made of corrugated iron and cardboard in an informal settlement close by. Living by himself he saved the transport money that the scholarship sent him to take care of his everyday needs.

Through dedication and an eagerness to learn Melokuhle established a close relationship with the mathematics teacher at his school. For him education seemed to be his only way out of poverty and he thus worked extra hard and attended all her extra lessons. He would also help her carry boxes to her car after classes and get some of the leftover food that the school provided students (she was in charge of this responsibility).

For months Melokuhle managed to fly under the radar and take care of himself with the small transport stipend and school necessities that the scholarship provided. In Grade 10 however, living alone with the bare minimum caught up with him and he became very ill with the flu. In trying to cope with this challenge, for the first time he shared the reality of his living situation with someone else. This led ultimately to him being provided with a higher stipend and more physical support from the scholarship. He was also allocated a social worker who wanted him to move into a 'home'. But he could not envisage this and refused. With the new support structures provided however, and with the support of his grandmother from 'afar' in Limpopo, Melokuhle spent the next few years in his same abode and was able to complete grade 12 successfully.

Melokuhle's aspirations extended past high school. During his matric year he started applying and looking out for tertiary opportunities. He didn't have access to the internet or someone to help with applications so he relied on a friend for help and basically did applications 'through' him, by supplying him with all the documents that his friend would submit and then wait for his friend to report back when there was a status update on his applications. He wasn't aware that universities had a set date by which to write NBTs and by the time he wrote his NBT, he

had already lost out on spots at most universities. Luckily, because of his good marks he was offered a place in an extended degree programme and managed to secure a scholarship to support his tertiary career. Without the education philanthropy scholarship that provided funding for tuition, travel and other expenses, it would have been impossible for him to study further.

While Melokuhle's 'success story' and his description of how the tertiary scholarship provided him with the opportunities he required, Melokuhle reflected with mixed feelings the ebbs and flows of his educational journey. While he was proud that he had made it this far and been accepted at a prestigious university in a specialised course, he spoke about feeling like an 'imposter' without the requisite knowledge, skills, and dispositions of other university students. Hiding in plain sight, he was always playing catch-up on what he didn't know, while never having access to the support systems and multimedia that had come to dominate the tertiary environment. In one instance he had, for example, 'written out an assignment' instead of typing it and submitting it online, and his tutor accused him of doing his work last-minute and copying from others. In his school years, because of his living situation, he had never had access to a laptop or to internet, and it thus became a major obstacle when he got to university where everything was online. Melokuhle reflects that success at educational institutions in South Africa was really not about doing well at school, or working hard, or getting access to funding. Rather, even with all these in place, the realities of life were often simply too overwhelming. He mused that it was about the individual's ability to always adjust to the changing reality, that ultimately offered any semblance of success.

Melokuhle's story is that of a rural student entering the urban space in search of education to mitigate the poverty tied to his previous environment. It is a story about death, trauma, unemployment, a lack of housing, the absence of immediate family support, and the struggle for funds to sustain the most basic needs of everyday living. And even in its most rudimentary form, it is a story of human suffering, personal joy, and personal success.

His is not a story easily distinguishable as the success of education, of the important contribution of education philanthropies, or of the power of scholarships in assisting Melokuhle to achieve his goals or dreams. Neither is his an easily distinguishable story about the intrinsic value of the grey space between private and public education provision and funding that created the openings for Melokuhle to access the opportunities that he was able to.

In the end, Melokuhle's story is a combination of the ways in which public and private actors have negotiated political openings and alliances (whatever the reasoning) in the contemporary moment, how the openings create opportunities for different individuals, and the kinds of windfalls and moments of fortune it requires to mitigate the defining structures of racialized, gendered, and classist educational discourses within an overall educational landscape that readily speaks about 'quality education *for all'* .

For Melokuhle his ability to take up the various opportunities was undoubtedly also captured within an educational discourse that included a desire for 'quality education for all', social justice, and promoting the kinds of social solidarity amongst students that lead to the development of a more sustainable worldview. These conceptual goals are not necessarily self-evident in Melokuhle's short story provided above. Thus, the aim of the rest of the dissertation is to provide the links, connections, and overlapping narratives that reveal these.

With that in mind, it is notable that the central research question that drives the dissertation is: *What is the influence of philanthropy through scholarships on selected youth experiences of public education in South Africa?*

Some initial comments on key overlaps between public and private educational spaces

Debates about quality education in the contemporary period often focus on what the notion of quality entails in a floundering modern state system, what kinds of education would serve most students best, and the level of efficiency and effectiveness that is tied to the provision of education. Such debates take for granted that students have accessed education, that students are able to be retained in the overall system, and that the goal for all students is that of success (whatever that may mean). Debates about 'quality education' also presuppose that the providers connected to the different routes and pathways to education (public or private) are all committed to education as both a form of development and social mobility, and that the understanding of 'quality' is what is provided within the different provisions of education.

The dissertation examines such premises to show how the discourse of *quality education* has been flattened into a curriculum discussion (what students know) rather than a political economy imperative (Novelli, Higgins, Ugur and Valiente, 2014). It also explores the ways in which 'quality education *for all'* has paradoxically become a rallying call by which private education providers have sought to get greater access to the overall educational landscape; how debates about 'for all' has not only been about providing *for* the different students scattered

across the educational landscape but about giving all education providers the opportunity to provide support for them.

Furthermore, in flattening the orientation and dispositions of the different sectors to that of educational content and support, the delivery of education has come to both be seen as *how* best to promote *justice* (or *injustice)* (Novelli et al., 2014: 8). On the one hand, providing equal participation to all members of society may sometimes meet their needs but it does not acknowledge the very different challenges that confront students in different social contexts. As such, a simplified approach to educational participation may in fact foster social injustice.

On the other hand, recognising that all students are social citizens with interdependent needs can promote social justice if an equitable distribution and a physical and psychological environment that fosters student safety, self-determination, and the recognition of their value regardless of their ability to function within educational settings is sought. In such a scenario, social justice can be fostered by balancing the social responsibility of all students with the need for democratic participation and student inter-relatedness (Adams, Bell & Griffin, 2007:1).

Crucially, the quest for social justice across the educational landscape is less about 'participation and access to education content' and more about how relations of trust and social responsibility amongst students can best be built. In this regard, Sayed, Badroodien, Hanaya & Rodríguez (2017: 2-6) note that it is mainly within public institutions of education that spaces for social cohesion, peace building, and reconciliation are most possible or desirable, given that the goal of 'peace building and reconciliation' is to help students understand the political, economic, social, and cultural conditions that frame their educational and social experiences. This latter framework is often not evident within the discourses of private education provision, nor readily pursued.

The dissertation teases out whether the social justice goals of society and the need to foster social solidarity amongst all students are jeopardised by the flattening of the boundaries between public and private education provision. It asks how this frame the lived experiences of students that access private scholarships. It also questions the basis of the increased role of philanthropies on the educational landscape- namely that philanthropies are traditionally driven by an ethos of social justice and public good (Reich, 2020: 15) - and asks why the private funders that funnel monies to them are assumed to be similarly predisposed (Giroux, 2003).

A concluding point is that discourses of quality education and social justice (as considered fundamental to the function of public education) play out in different ways in the vocabularies

and languages that students employ when they speak about their educational experiences across public and private education spaces. In analysing student stories to identify their disposition towards social solidarities with other students, the dissertation hopes to show how the public-private nexus shapes the ways in which they describe these educational experiences.

Chapter outlines

The purpose of the first chapter was to introduce the various debates tied to public-private education provision in South Africa and the role of education philanthropies (via scholarships) in shaping the educational lives of students that operate on the boundaries thereof. The chapter also introduced the story of one student as a way of illustrating some of the issues that the dissertation covers in the lives of the study's participants and outlines the associated discussions and argumentative threads that shape participant stories.

This chapter is then followed by the methodology chapter. In a Masters dissertation this chapter is normally introduced after the literature review and conceptual framework. It was felt however that telling the reader how the study was conducted and the logics thereof is better placed as chapter 2, especially given that the introductory chapter does not provide methodological elements for the reader to know how the research was set about.

The literature review follows in chapter 3 and outlines the research on public and private education and philanthropy. The chapter is divided into two sections that explore the main debates concerning the influence of neoliberalism on education and the historical role of philanthropy in supporting marginalised youth. By examining three overarching questions that underpin the central ideas discussed in this chapter, a better understanding of the educational experiences of students in a constantly evolving environment is hopefully provided.

The conceptual framework outlines in chapter 4 the theoretical lens that is used to analyse the collected data. The chapter describes how the political economy of education contributes as a lens to understand what the changed landscape of education may entail. In addition, concepts drawn from the work of Aslam Fataar and Crain Soudien are explored to make sense of student experiences.

The findings chapter presents the stories of scholarship recipients, obtained from interviews. Organised thematically, this chapter teases out the binary of public-private and exposes the complexities of the 'grey space'.

The discussion chapter threads the literature with the conceptual framework and the expressed views of students to draw out key insights about the public-private overlap in South Africa.

The short final chapter serves to consolidate the various perspectives and methodologies presented throughout. By focusing on key insights from the findings, it brings attention to key issues and questions, and provides a critical evaluation of the study's main educational question.

Chapter 2: Research Methodology

Introduction

Education, and its systemic and provision processes, does not exist in isolation from broader social issues, with the interests of a host of stakeholders, interest groups, and relationships bound up in how education connects with different societal concerns. And at the heart of understanding these processes there is always a need for public accountability (Punch & Oancea, 2014: 42).

Research on education and its processes is thus never a straightforward exercise, given the need to understand and engage with a large number of activities, procedures, and issues, and to explain how these connect and account to the academic 'public'. The approach or outlook taken by the researcher at both the methodological and at the conceptual/theoretical level is also a fundamental part of the overall process of unpacking the key interests and relationships that underpin what happens when doing research in different contexts.

In this dissertation the focus is on the educational experiences of students in South Africa that obtained a scholarship from one designated education philanthropic organisation. It focuses on student experiences at 'the local context level' and how this reflects on bigger political economy questions like social mobility, poverty, and individual development. The dissertation centres on the stories of a set of students that received scholarship support, to provide a human dimension to the discussion on the overlaps between philanthropy, public-private education provision and the purpose and role of education in the 21st century.

This chapter outlines key decisions taken in the study tied to the focus of the study, the chosen participants, the research design, the philosophical approach, the methodological approach, the methods used, and explanations around all the elements that need to always be accounted for when doing research with human subjects.

The organisation that served as the conduit for the study

The study chose to zoom in on one education philanthropic organisation in South Africa that offered scholarships to students in public institutions to get a sense of their experiences of education through the lens of their scholarship journey. Given that I, as researcher, worked at a registered non-profit, public-benefit organisation based in the Western Cape that provides *full scholarships for marginalised youth* at the high school and tertiary level across South

Africa, it seemed apt to select this organisation as the vehicle by which to access the participants for the study.

The reasoning for choosing this organisation was that I had a level of access to an education philanthropy organisation that would allow for 'deep digging', something that would not be possible elsewhere. My position in the organisation also gave me access to staff members in the organisation and students attached to scholarships, especially senior and graduate students. While there were obviously questions about my positionality, and personal and professional bias tied to my being employed at the organisation, processes were put in place to mitigate and address these potential challenges.

Chosen Participants

In terms of the research participants in the study, the chosen non-profit organisation provides scholarships to 270 student/students across South Africa in various public schools and universities. For the study it was decided to focus on a sample of 20-25 students and to capture their individual backstories. The purpose of collecting this data was to better understand the different kinds of discourses that underpin the overlap between philanthropy, scholarships, and education within the lives of human subjects.

As a researcher working in the philanthropic and scholarship industry in South Africa, I had a historical relationship with most of the students that received scholarships from the organisation - which also meant that a general rapport was already established. I will address the potential for bias tied to this later in the chapter, but the main approach was to statistically break down the total students into a justifiable sample and to develop a set of criteria by which to decide on the final sample of 20-25.

Starting with the initial group of 270, this was broken down into only senior students or graduates on the program, which left me with 77 possible participants. I then applied filters like university attending, provincial location, and race and gender, to settle on the final 20-25.

For the study, I further collected additional data from role players working in the organisation to provide in-depth insight into the inner workings of a philanthropic organisation providing scholarships to an identified group of students in South Africa.

Research Design and Methodology

The main research question for the study was: *What is the influence of philanthropy through scholarships on selected youth experiences of public education in South Africa?*

To address this question, three sub-questions were explored:

1. What is known about the contribution of philanthropy to students in the public education sector in South African?
2. How do different recipients come to hear about and receive the scholarship?
3. How do scholarship recipients describe their experience of philanthropy as members of public education institutions?

The study adopted a qualitative research strategy and a generic inductive approach. Mouton (2001: 65) asserts that the qualitative data approach is more appropriate when unknown aspects of participant lives or behaviours need to be identified, documented, or confirmed.

The goal was to utilise a style that offered methodological flexibility given the fluid nature of student backstories across multiple settings. The approach also offered open-ended sourcing of data, with a wide range of possibilities that could contribute to the broadening of the topic at hand (Cresswell, 2009; Khandkar, 2009). It was felt that following other more traditional (or popular) strategies may limit attention to the social realities of youth experiences (Liu, 2016: 129).

The ontological position of the study was that reality is subjective and constructed for participants and thus the chosen approach needed to be mainly interpretivist in nature, providing the freedom to consider the changing categories of meaning in the data analysis chapter (Bryman, 2012: 32). Adopting a qualitative approach to research also assisted in distilling and understanding interpretations of lives that have meaning and purpose, but that needed to be analysed in collective and individual ways (Brinkmann, Jacobson & Kristiansen, 2014: 20-22).

Data Collection

Student Participants

The main participants in the study were students that received scholarships from the noted education philanthropic organisation. These were distilled from the afore-mentioned 270 young people that receive the scholarships. The first applied filter was senior students enrolled at tertiary institutions, as well as 2019 graduates. Other filters included income levels, academic performance, race, and gender. The scholarship uses these filters to choose recipients and thus these seemed apt to apply again. Other filters included the urban-rural split, which university they attended, and time spent on the programme. The goal was to develop a sample that criss-crossed diverse sections of culture and backgrounds.

The decision to focus on senior students and mostly 2019 graduates was based on them having experiences both of high school and tertiary education spaces and thus could reflect using a longer engagement with scholarships. The above filters assisted in identifying approximately 77 target participants that could form part of the sample.

Since qualitative data does not aim to generalise but instead seeks to develop an in-depth understanding of the social reality it is studying, stratified purposeful sampling was then used. This considered a variety of criteria within a wide range of situations for maximum sample variation. This type of sampling is described by Patton (2001) as 'samples within samples' and was stratified by selecting particular units that vary according to three key dimensions:

1) Research participants who study in their home province versus those who study in a different province.
2) Research participants with lesser or more time spent on the programme.
3) Sponsored versus unsponsored research participants.

By using a stratified sampling approach, a variety of characteristics that influence participants experience were taken into account. The justification for choosing these filters were as follows:

a) Given that public education is not the same in every province, the research project surmised that the experience of public education in relation to the scholarship was different in different provinces.
b) The more time the research participants experienced on the programme, the greater the insight they would have on the support offered and the influence on their lives.
c) Based on the workings of the scholarship, the research project was keen to see if the experience of the public education system was different when participants were linked to particular sponsors.

Based on the three dimensions highlighted above, 25 research participants were subsequently chosen for interviews from the 77-student target group. By the time the project started, 3 potential participants were no longer available.

Within the group of 22 students, efforts were then made to include students from different provinces, urban and rural backgrounds, the institutions they attended, as well as getting a diverse group using Census race categories. The final filter of course was whether they were still available or willing to participate.

82% of the final sample group (22) were students of colour (African and Coloured), with 45%

studying in the Western Cape. Notably, while many studied in the Western Cape, the sample group came from seven out of the nine provinces in South Africa – five students from Gauteng, five students from the Western Cape, four students from Kwa-Zulu Natal, three students from Limpopo, two students from the Northern Cape, two students from Mpumalanga, and one student from Free State.

The purpose of doing interviews with role-players within the non-profit organisation was to check and triangulate the data available on the organisation. Given this logic, those interviewed were mainly those that made themselves available. Efforts were made though to include junior, middle-management, and senior role players in the organisation to get a differentiated view, and also to interview staff categorised according to race classification across a range of departments (scholar support, programme development and fundraising) to bring a range of viewpoints to the fore.

Data Collection Instruments:

The study mainly used in-depth and semi-structured interviews as its main research instrument. Semi-structured interviews were used where triangulation was mainly sought, while in-depth interviews were needed where there was a need to capture different experiences and insights around the relationship between scholarships and public education. In many such cases open-ended questions were found to be more useful.

Given that the fieldwork for the study was conducted under conditions challenged by the Covid-19 pandemic, all interviews were conducted virtually (on Zoom). This was done to ensure the safety of all participants. Identified participants were identified and then contacted and invited telephonically, and once they agreed were contacted via email and provided with further information and a consent form which they needed to sign and return. Only once these signed forms were returned, were they contacted to arrange for their interviews.

Digital recordings of the virtual interviews, both audio and visual files, were made and appropriately stored. The recordings were created to ensure that the data collected relied on conversations that were free flowing, and where no information was lost. After every interview, the 'audio file' was reviewed with the intent of making verbatim transcriptions to identify themes that arose throughout the interviews. These recordings together with consent forms and interview transcripts were then retained on a password protected external hard drive that only the researcher has access to.

Interview schedules were developed prior to interviews with mainly open-ended questions

designed around the sub-questions of the study. These questions served as a guide for interviews conducted, although the researcher used her discretion when prompting students to elaborate or clarify information that was shared. After the first two interviews, the researcher in collaboration with her supervisor added additional questions around student experiences of pressure during the scholarship. This question related directly to the experience of the students on the scholarship and in relation to their understanding of education and whether it enhanced their experiences.

Data Collection Process

All 22 research participants were first contacted telephonically to introduce the study and discuss whether they wanted to participate. During these calls, it was explained that their interviews were not tied to the scholarship at all and therefore they were not obliged to participate. The ethics of social research was discussed, and participants were told how interview data was intended to be used and information shared. It was explained that the information would be used solely for the sake of research and would be bound by the research rules of the university. Participants were also assured that their privacy and rights would be protected at all times. Because of the costs of doing interviews by Zoom, the participants were offered free data, paid for by the researcher, in order for interviews to be completed and to ensure student participation.

The recorded Zoom meetings elicited particular challenges and vulnerabilities. Firstly, many students were at home during their interviews (due to the Covid-19 pandemic) and took the researcher virtually into their homes. This opened up personal vulnerabilities in different kinds of ways. Secondly, the online space can be quite disorientating, making empathy, prompting, and encouragement to share authentically quite difficult. Efforts were needed to specifically develop, share, and co-construct the images that participants were trying to portray. This often involved the researcher sharing images that connected with their vulnerability, including ensuring the images they saw were calm, modest, and comfortable, and with all its distracting elements such as pets. The researcher also encouraged the participants throughout their interviews to have something to drink, or to have a snack close by. Thirdly, given the lack of face-to-face contact, a level of interaction and informal conversation was required before interviews to put participants at ease, along with making comfort breaks more regular than in a face-to-face interviews. Lastly, unlike physical interviews where conversations address beforehand issues of positionality and discussing the invasive nature of an interview, online interviews required levels of awareness and communication where participants needed to be

told when a recording was being started and where their permission was needed on what to include and what to delete. All these actions needed to guarantee that no research participant was exploited or disadvantaged, and that no harm came from the various interactions (Wiles, Charles, Crow, Heath, 2006).

Ethical considerations

In qualitative research, it is necessary that 'no harm' is done when working with 'human subjects' and that all dimensions of 'informed consent' are always adhered to. All research therefore had to be completely voluntary, and consent could be attained only via engagements and ethics of respect for the person, according to democratic values and academic freedom, and based on knowledge about their lives. The ethics of consent included 'minimising harm', 'respecting their autonomy', 'protect their privacy', always offering reciprocity, and 'treating all participants equitably at all times' (Dowling and Brown, 2012: 33). Efforts not to abuse participant generosity was also required at every turn, especially on how their voices and stories would be shared.

Confidentiality is crucial in all qualitative research, with anonymity needing to be guaranteed at all times. This includes protecting the privacy of organisations as well as of human subjects. For the study, neither the name of the organisation nor those of the participants are disclosed at any point in the study, with anonymity and privacy always assured (Saunders et.al., 2015: 2; Edwards, 2020: 1).

Notably, confidentiality and trust operated at a variety of levels. It was not just about ensuring that participants couldn't be easily identifiable, but also about ensuring that their stories remained authentic. This was achieved by applying the following process. Firstly, once interviews were completed and transcribed, each student was immediately given a pseudonym. This was done to ensure participant identity was fully protected and confidentiality maintained. Secondly, pseudonyms as a common tool in qualitative research (Nespor, 2000: 546) was applied as an assurance to participants that the data to be written about could be shared without prejudice. Thirdly, assigning pseudonyms and the re-naming of participants implied the application of particular attitudes, insights, and power relations on the part of the researcher (Lahman, Rodriguez, Moses, Griffin, Mendoza, and Yacoub, 2015: 448). While some researchers often simply reduce a participant to a number, which is deeply problematic, naming the participants came with a level of responsibility, where participants needed to be represented in ways respectful of their full integrity, identity, gender, and cultural orientation (Edwards,

2020: 2). Achieving such a level of authenticity in the choice of pseudonyms was crucial when applying the ethics of confidentiality and trust.

Positionality

For this project, positionality was an important consideration and referred to the positioning of the researcher to the context of the study, and specifically in relation to the organisation and the research participant group (Rowe, 2014). This also included not only the researcher's relations with the research participants but also the participants' relations to the stories they were telling. Concerns about positionality was evident with the following:

- The researcher was a member of staff of the non-profit organisation. This gave the researcher a level of access that could be prejudicial, where space was allowed for research to happen and where access to the students was easily granted.
- The researcher could exhibit overly positive approaches towards students, and also present quite subjective views about the organisation.
- Given that participants were scholarship recipients with the organisation that the researcher worked for, the researcher could be prone to develop levels of familiarity with participants that were unhelpful.
- The researcher needed to be mindful of the power dynamics that existed given that she worked for the organisation, and the participants were scholarship recipients, and find ways to mitigate this.

To address challenges noted above, the researcher focused on collecting and only working with information and data that emerged from interviews, and through interactions with participants. Positionality was also addressed through speaking openly with participants about the data collection process and expectations of the research. The researcher made individual calls to prospective students and briefed them on what would be required prior to obtaining consent. At the beginning of each interview the researcher made sure that each participant was still comfortable participating and confirmed that the interview questions will not be for the organisation's information but will be kept confidential ensuring that they trusted that they could speak freely and openly, and that a particular story or narrative was not being expected. To address suspected power dynamics, researcher made sure to be comfortably dressed, encouraged participants to get something to drink, have bathroom breaks throughout and have personal household items visible to humanize the experience and encourage an engagement as equal participants.

Trustworthiness of collected data

Credibility

The credibility of the study and its collected data was based on how the research questions were developed and how data collection was organised accordingly. It was assured by a robust and precise approach taken in relation to the chosen sample, and the choices made with regard to the instruments and approach. It is credible because attention was paid to the various scientific requirements and robustness of the research, and the efforts taken to triangulate and check collected data at a variety of points.

Transferability

The views and debates that emerged in the research project spoke to the relationship between private and public education at the local, national, and global level. Much of the data reflected concerns on what was happening in the rest of the world. In that respect, key insights about the project could be transferable in that some of the arguments could be as easily related to other contexts across the world.

However, given that it was a small qualitative study with a small sample on only one not-for-profit organisation in South Africa, the findings in the study certainly *cannot be generalisable*. Notwithstanding the multitude of other types of philanthropy with scholarships in South Africa, with different narratives attached to their participant experiences, interactions between private education provision, public education provision, and philanthropy would almost certainly present differently with other 'types' of philanthropy.

Limitations

One clear limitation of this qualitative study is noted above as not being generalisable. A second limitation is that this project was perhaps overly ambitious and tried to cover a broad range of literature, analysing various landscapes, and conducted extensive qualitative interviews with 22 students from accross South Africa. As a result, the researcher had a substantial amount of data and knowledge that needed to be incorporated effectively into a minor dissertation.

Data Analysis:

Throughout the production of the project, the non-linear and recursive nature of qualitative research was ever apparent, especially as the project was preoccupied with experiences and recollections shared by students (Walker & Myrick, 2006: 553). The analysis of data gathered

involved a lengthy process that started with creating verbatim transcriptions of each interview.

Each interview lasted between an hour or two, with sometimes 2 interviews of 1-2 hours conducted with participants. This produced an overwhelming amount of interview data. From this, the researcher studied the transcriptions line-by-line in order to be familiar with the information and stories shared by the students. Throughout, themes were identified that could be used in the findings and discussion chapters. The researcher was acutely aware to protect the integrity of the data by not sharing the ways it would be captured and analysed with participants. This allowed the researcher to spend much time *writing the 22 individual stories* – which then became the main data set that the researcher worked with in the writing of the findings chapter and for the analysis.

Organising data with Findings chapter in mind

In the findings chapter, to address the project's three sub-questions but also to work with the different themes that came out of the 22 stories, a decision was made to create and construct 22 quite different and deeply interesting and affecting stories around the respective interviews and interactions. An initial methodological 'trick' in the dissertation was to find a SINGLE WORD in each written story, that aptly described that story and then to also frame the narrative around it (Walker & Myrick, 2006: 549).

These 22 narratives became the main data set from which the dissertation sought to address the main research questions and the sub-questions. It was an inductive approach that allowed for identifying important similarities or differences across the stories of the 22 participants. It also served as a useful way to try to intersperse the participant stories when chapter 5 was written with the broader narrative of the dissertation on public-private education and philanthropy.

The second phase of analysis made use of an axial coding method, aimed at putting data together in potentially new ways. This was accomplished by reviewing three aspects of the data tied to the research question and its focus. These were, namely the nature of philanthropic contributions to students in public education in South Africa, how the different recipients came to hear about and receive their scholarships, and how scholarship recipients described their experiences of philanthropy as members of public education. Writing the findings chapter around these questions contributed to the description and delineation of categories of description in relation to others (Walker & Myrick, 2006: 552-553).

The last phase of the analysis process involved selective coding and integrating the data provided in Chapter 5 and connecting this to the central debates as highlighted in the literature

review and conceptual framework chapters (Walker & Myrick, 2006: 557).

In attempting to 'dig deep' (Geertz, 2017), the analysis process offered important insights into the experiences of scholarship recipients and how this connected to 'the private incursion' of philanthropy in public education spaces, as well as what it meant to students and their lives.

The names of the 22 participants (all pseudonyms), along with the single word that aptly captured their story were as follows:

NAMES	DESCRIPTORS	NAMES	DESCRIPTORS
1. Grace	Imagining	12. Lettie	Pretend
2. Athenkosi	Desperation	13. La-keshia	Escape
3. Raaida	Freedom	14. Allistair	Resentment
4. Kagiso	Becoming	15. Nolwazi	Privilege
5. Lindiwe	Angst	16. Dian	Acceptance
6. Kabelo	Future	17. Letsatsi	Transition
7. Stefan	Easy	18. Nicole	Paradox
8. Mandla	Access	19. Anika	Demure
9. Shantoleen	Limits	20. Ashley	Serendipity
10. Naa'irah	Connections	21. Palesa	Assurance
11. Nokuthula	Chosen	22. Anja	Choice

When the findings chapter was eventually finalised, it was decided to exclude 4 of the story narratives. This was simply due to dissertation word count limitations and the need to cut back on the size of the findings chapter. As such, chapter 5 captures text and threads from only 18 participant inputs.

Conclusion

This chapter outlined the research design together with the adopted methodology and approaches chosen to conduct the study. The dissertation hereafter focuses on the literatures that inform key debates in the study, followed by the conceptual framework, and the findings and analysis chapters.

Chapter 3: Literature Review

Introduction

This chapter explores two sets of debates within the literature, namely that on public education and private education, and that on philanthropy, both internationally and in South Africa. It does so to better understand the key challenges and dilemmas that education for young people within education systems face in the 21st century, as explored for public education in South Africa in the findings chapter. By connecting the public education-private education debate to that of the historical and contemporary role of philanthropy, the goal is to show how the latter's contribution to the education of marginalised students came to focus on students attaining sustainable livelihoods in South Africa. The chapter also adopts a cultural political economy approach to engaging with literatures on education provision, to reveal how public education in fundamentally part of political and economic debates and how it has become splintered over time into different forms, mechanisms, and thinking according to particular needs and according to the identified student base. In so doing, the chapter seeks to understand the objectives and overall functionality of the public education system in an environment where multiple new actors have entered the landscape.

Key overall questions that underpin the main and ultimate ideas explored in the *dissertation* include:

- How did, and does, 'private philanthropy' exist within the public education system, and how has this come to play out against the background of larger neoliberal, corporate, models or imaginations of schooling (and education)?
- What is the implication of this latter development for 'education as the production of agency' for young people, that assists them make sense of their circumstances in the most bereft of conditions (Giroux, 2004: 501)?
- What kinds of languages, vocabularies, and approaches have emerged as private participation have begun to interpret the conditions and strategies that drive change in public education; languages/discourses that posit a 'particular kind of future' and a particular kind of social imagination for young people?

The literature review chapter is structured into two main sections. Section 1 provides an overview of key thinking and debates that sketch the connecting origins of public education and private education debates (i.e. the roll-out of the neoliberal project). Section 2 outlines the historical role of philanthropy in providing marginalised students access to knowledge and

skills, engaging with its connection to the perceived role of public education to ensure greater social justice and the reduction of inequality.

In the *first section* the literature review explores the emergence of political economy of education frameworks that have sought to explain the ways in which educational systems have operated over time, and how best to analyse this in the contemporary period. It ends off by discussing the concept of 'public-private partnerships' as a way of setting up an exploration in the *second section* on how philanthropy and education have come to provide different opportunities for young people in recent times. The focus ultimately is on the evolution of local education take-up related to the contextual conditions of different students, and as such the latter sections of the chapter examines how debates on the public-private intersect with that of philanthropic provisions at the *local levels of South Africa*.

With the above in mind, it needs noting that across the contemporary world a corporate model of schooling provision has clearly overtaken nearly all other education policy developments and thinking, educational practices, and curriculum reforms. This orientation, Saltman (2012: 674) notes, initially started out on the political right but in recent times has also come to span the entire political spectrum and is embraced by most political positions.

For the left of the political spectrum, inequality and poverty remain the two biggest global challenges plaguing the modern world (Oloruntoba, 2015: 122), with chosen economic policies unable to puncture the rapid increase in inequality across the world (Sayed, Ahmed & Mogliacci, 2018: 192). On the right of the political spectrum, economic growth is regarded as the main pathway for the reduction of poverty and inequality and securing the future well-being of different societies. For those on the political right, education is the key conduit whereby complex global social and political dilemmas can be resolved, involving greater internationalisation, global economic integration, and narrow attention to how it leads to poverty alleviation (Sayed et al., 2018: 192; Verger & Bonal, 2012: 12; Christie, 2008; Motala, 2006).

This can best be seen in global agendas promoted by multi-layered agencies like the World Bank, UNESCO and UNICEF in the early 2000s, that claimed that a global commitment to education would play a key role in economic redevelopment and poverty reduction across the world (Samoff, 2009; Mundy et al., 2016). In this framing of educational development, education was regarded as a strategic investment in human capital, the growth of economies,

and the promotion of important market mechanisms that allow for the sustainability of new emerging systems (Robertson et al., 2012).

Most markedly, the corporate model of education provision has come to champion private sector approaches to reform, with the privatisation and deregulation of different education provisions (especially schooling) prioritised, and terms and assumptions tied to business imported into the ways in which schools and other education institutions have been imagined. This has led to education being approached as private businesses that treat their educational districts as markets, their students as consumers, and knowledge as a product that should be retailed to those that can pay.

For the right of the political spectrum, corporate school reforms for example are regarded as the main vehicles by which all schools can be transformed into private industries, with recent shifts to schools managed through initiatives like voucher schemes or collaboration schools claiming to turn them into better managed and more effective institutions (Saltman, 2012: 676).

Corporate school reforms, the political right argue, also offer ways of solving larger social problems and dilemmas. This is done, it is said, by reconfiguring the current public sector approach to education, embracing the introduction of schooling contracts, corporate cultures, new management systems, and ensuring that schools absorb languages of global economic competition, individual fulfilment, individual opportunity, and better educational attainments into their vision statements (Saltman, 2012: 676).

The World Bank's Education Strategy for 2020, that considers education as a vital tool for alleviating poverty and increasing employment, is a good overall example of the above corporate approach, that shows a clear and gradual shift towards the privatisation of public education (Verger and Bonal, 2012; Mundy et al., 2016). In that regard, global reform initiatives have claimed that it is only through private contributions and investment that education will *arguably* get to make a more substantial public contribution to the public good of society (Robertson & Verger, 2012; Robertson et al., 2012). Global reform initiatives have thus pushed for private funders and particularly philanthropies to play a bigger part in increased privatised investment in public education spaces.

Section 1: Political Economy of Education and Neoliberalism

Political economy can be defined as:

> "the study of how the relationships between individuals and society and between markets and the state affect the production, distribution and consumption of resources, paying

attention to power asymmetries and using a diverse set of concepts and methods drawn from economics, political science and sociology." (Novelli et al., 2014: 10)

Political economy is about the ways the relationships between political, social and economic systems operationalise consumption, finance, and provision to inform what is required, what is provided, and how it is consumed in society (Carnoy, 1985: 157; Daoust & Novelli, 2020: 2). In that respect, a variety of discourses have historically interacted with and influenced how political, social and economic systems are understood.

This is particularly the case in education and education policy, where sets of normative languages have always shaped its operation and thinking. In recent times a particular discourse and set of ideas have emerged that have fundamentally redesigned the reform of the public education sector across the world (Ball, 2007: 1) and have led to a subconscious acceptance of a way of thinking and doing that reshaped most contemporary social realities in local contexts (Ball, 2013: 13-19).

In the *Political Economy of Education Systems in Conflict affected Contexts*, Novelli et.al. (2014) provide an overview of political economy traditions that show the different discourses that have shaped education policy over time. They note that the dominant political economic ideology that has come to frame most education ideas and policies in recent times (Ball, 2012 as cited in Verger et.al., 2018: 5) has been neoliberalism. In their overview, Novelli et al. (2014) observe how neoliberalism and its previous iterations came to inform policy thinking to the extent it has, as well as how it came to perpetuate and reproduce inequality to the extent it does.

Neoliberalism is an ideology that got political traction in the 1980s-1990s at the end of the Cold War. It was asserted that the only way to economic growth, economic development, and stable economic environments at national and international levels was through the better operationalisation of international capital (Williams & Taylor, 2000:22). As a political force it was claimed that economic values could be linked to individual achievement and success if built on the foundations of freedom – freedom of the market and freedom of the individual from a status of dependency. Neoliberalism was thus defined as those political economic practices that could liberate individual freedoms within free markets in ways that benefitted the well-being of most societies. It was proposed that the well-being of humans could be best advanced by maximizing freedoms increased by private rights, individual liberty, and free markets (Harvey, 2006: 145).

Neoliberalism took hold in the 1990s after the end of the Cold War as a direct political response to almost 4 decades of welfare state provision; a period in which the modern state had committed itself to protecting the 'public good' and well-being of citizens on both economic and social fronts (Rust, 2000: 70; Williams & Taylor, 2000:22). As an economic response partly tied to the recession and economic challenges of the 1970s-1980s, the increased prevalence of neoliberal thought in the 1990s focused on embedding the principles of the market to serve as the valued guide for all human action and beliefs (Harvey, 2005: 3). This brought with it a language of competition, privatisation and performativity that was slowly applied to policy processes and public services all over the world over the next few decades, and subsequently came to reshape how many people came to understand and interpret their realities (Lewin & Caillods, 2008: 4).

The Political Economy of Education: understanding the influence of Neoliberalism

According to the neoliberal agenda, the education system has three main functions within political economic systems, namely, to integrate students into the different roles that are created by the growing economy; to encourage the development of the individual and their individual needs; and to try to reduce economic inequality as best possible. Bowles & Gintis (2007: 62) assert that the overall aim of a neoliberal education agenda is to produce a stratified labour market that advances human capital for economic growth.

The changing role of the state in education provision

The approach towards education's role in society as outlined above is a relatively recent phenomenon, having taken on its present form primarily since the 1990s.

In the USA from the 1830s, Horace Mann for example asserted that government-run schools could better serve the 'public good' by better bringing together children from diverse backgrounds, provide spaces where they could interact with one another and become proper citizens, and inculcate a set of uniform and common values that would contribute to the establishment of a stable and cohesive democratic society (Baines, 2016). It was an approach that generated further developments across education systems where, over many decades, schools became understood as institutions that could improve society overall, and that, with all else being more equal, a better-educated populace resulted in positive social effects.

In what came to be defined as 'public education' the purpose became to provide free and equal education to all children regardless of race, socioeconomic status, gender, or any other distinguishing feature, focusing on embedding a set of core citizenship ideas, content

knowledge, and skills that would assist them with sustainable livelihoods as adults (Kober, 2007: 1-7). Key to the goals of public education was 'preparing students for further learning and study', 'providing them with universal access to education', 'helping students fulfil their potential as young people, 'producing well-rounded students with a general base of knowledge about themselves and their contributions', 'fostering democracy', and 'pushing for social justice'; goals that underpinned "national education systems (that) arose as part of the apparatus of modern government in the Western world" (Mundy et al., 2016: 2).

From the mid-19th to mid-20th centuries, governments in many parts of the world significantly expanded access to schooling as a way of playing key roles in the socialisation and development of young people. Mundy et al. (2016: 2) observes that:

> By controlling the allocation of public resources for education; setting national curricula and standards; hiring and paying teachers and structuring their work; and owning the schools themselves, schooling and schooling systems played a central role in constructing what Anderson (1991) describes as the 'imagined community' of the modern nation state.

It was argued that through building shared principles and values across modern nation states, a new multi-nation architecture would emerge that embedded a form of liberalism that 'married the building of inclusive economies to greater civil and political freedoms'. Education as such would become the tool "not only for constructing more inclusive national economies, but for ensuring lasting peace based on common values of individual freedoms and shared prosperity" (Mundy et al., 2016: 3).

Goldberg (2009: 331) notes that:

> From the 1930s through to the 1970s, the liberal democratic state had offered a more or less robust site of institutional apparatuses concerned in principle at least to advance the welfare of its citizens. This was the period of advancing social security, welfare safety nets, various forms of national health systems, the expansion and investment in public education, including higher education, in some states to the exclusion of private and religiously sponsored educational institutions. It saw the emergence of state bureaucracies as major employers especially in later years of historically excluded groups. And all this in turn offered optimism among a growing proportion of the populace for access to middle class amenities, including those previously racially

excluded within the state and new immigrants from the global South" (cited in Giroux 2010).

In that respect, the modern state was traditionally seen as the main provider of services for 'the public good'. Public education and public education policy was assumed to be the prerogative and mechanism of the modern state that worked alongside the state's ability to exercise control and persuasion around the socialisation of citizens, the allocation of social values, and for initiatives that led to self and group development (Mundy et.al., 2016: 3-4; Zajda, 2006: 9).

This conceptualisation of the responsibility and role of the modern state however changed substantially from the 1980s-1990s (Zajda, 2006: 9). Under an emerging neoliberal system, the social egalitarianism that was previously at the heart of the modern welfare state became increasingly dismantled, with debates about the role of the modern state reorientated towards how best the modern state could withdraw from activities that impacted general populations, and focus instead on increasing individual freedoms (Astiz, Wiseman & Baker, 2002: 69, Soudien, 2002: 444).

As such, the key function of the neoliberal state was to 'bring the isolated individualised worker' into global discourse. This involved as much controlling the knowledge of students via transnational networks, but also making it more localised via decentralised sites of innovation. Weakening the previous modern state's control over knowledge production not only shaped how the state connected policies tied to economy and society needs, but forced the modern state to increasingly decentralise and privatise (Soudien, 2002: 445).

Yet, notwithstanding the shift towards market logics and the greater desired influence of non-state actors (Miraftab, 2014: 93), the modern state under neoliberal systems was initially still regarded as the main vehicle for ensuring the fulfilment of people's right to education. Rather than the provider however, the modern state became considered as the key *enabler* of education services. Thus, while the legal obligations of education provision were thought to still lay with the state and state actors alongside the responsibility to ensure the right to education, the *provision* of education services, it was argued, could lie elsewhere.

On the one hand, the role of the 'nation state' became about how to develop and implement educational policies without actually owning educational entities, and applying regional and global understandings of governance to organise this (Morgan & Volante, 2016: 2-6; Potterton, Edwards, Yoon & Powers, 2020; Verger et.al., 2014). Rose (2007: 3) observes that when this new envisaged role of the modern state became that of policy regulator and enabler (and not

physical provider of provision), a new discourse of governance emerged that suggested taking differing approaches and attitudes to governance, as well as how to physically organise education institutions at regional and local levels (Cordozo & Novelli, 2018).

On the other hand, discourses around the role and purpose of schooling and its knowledge contribution focused on what was understood to be 'quality education', and the role of the state and other state bodies in shaping and overseeing this. With a discourse of economic competitiveness shaping how education performance and success was measured, the role of the modern state in providing a curriculum that encompassed common understanding, shared values, and democratic interaction, was replaced by an approach that compartmentalised knowledge content (quality education) and its role and importance within education institutions (Lingard, 2020: 267). This encouraged a bigger role within international discourse for private providers operating within public institutions (Verger, Fontdevila and Zancajo, 2018: 267).

New approaches to governance, provision, and financing thus became the key ways by which to distinguish between the public and private spheres in education. And where non-state providers were involved, different sets of actions, responsibilities, and interactions became possible (Rose, 2007: 3-6).

Re-interpreting the public good function of education

Discussions about public education and the 'public good' are however far more complex than the taken-for-granted primary responsibility of public institutions around the provision and funding of educational opportunities, and the long-established principle that education is a human right and a public good (UNESCO, 2015: 11). In different contexts, the role of the state has traditionally (in staggered ways over the past 150 years) been to ensure the right to education for all and safeguarding the social justice concerns and the public commitment to education. This role was tied to the somewhat noble belief that education (and schooling) should serve as a primary sphere for the development of a democratic commons and as a centre for critical learning and thinking that generates public values important for the development of society in general (Bous & Farr, 2019, Morgan & Volante, 2016).

This complexity is mainly tied to what is understood to be a 'public good'. Daviet (2016) asserts for example that the term 'public goods' has always been tied more to economic debates about what comprises 'market failures' within institutional provisions. That was when the state needed to intervene in a provision of a product or service where the market couldn't guarantee

the efficient provision and price or such a ‘product’ or ‘service’ (examples here include clean air, street lights, railroads etc).

In providing an economic argument for what was deemed a ‘public good’, economist Paul Samuelson (1954) outlined two underlying and necessary conditions that continue to be applied. He noted that the ‘good’ had firstly to be non-rivalrous, and secondly, it needed to be non-excludable. In the first instance, “one person’s consumption of a good couldn’t diminish other people’s consumption levels of the same good”. In the second instance, because of its significant benefits to the broader public, “people couldn’t be excluded from consumption” or prevented from accessing the benefits thereof because they did not directly pay for it (Locatelli, 2018: 3).

However, the challenge with ‘public goods’ being approached mainly in relation to economic theory is that what is considered non-rivalrous and non-excludable can change over time in relation to the local context and the requirements inherent in that space. For example, in situations where a student occupies a seat in the classroom and other students are prevented from the same seat, or where a teacher is less able to provide a quality product because of the number of students in the classroom – reducing the attention that each student could expect. These situations have often led to the use of outside interventions to mitigate the challenges, thus challenging the ‘boundaries’ of the economic definition of education as a ‘public good’.

Yet, until recently, even in instances where access to a public good (like education) became rivalrous, state (public) intervention was still justified. This was because of other economic considerations tied to the public benefits that such a ‘good’ engenders, the ways in which equity and social justice is harnessed, and how the redistribution and regulation functions of the state is needed to “ensure equality of opportunity, inclusion and social cohesion” (Locatelli, 2018: 4).

Education has thus been deemed to remain a public good based on it ‘having a clearly defined ideal content value but no agreed-upon implementation strategy (Ver Eecke, 2008) and needing state intervention for optimal access. The definition of education as a public good has also tended to be intrinsically linked to the *functions and role of the state* in modern Western societies tied to the financing of education and the ability to deliver on the provision of it as a public good (Salaman & Anheier, 1992: 125-128; Marginson, 2011: 417-418).

However, within the increased influence of neoliberal thought from the 1980s, the dominant argument has been that *human well-being* can be advanced by using the free market to protect and maximize the freedom of individuals and increasing their private rights.

This is based on key corresponding developments coming into view, namely:

- Traditional beliefs in education as a public good have been challenged by discourses that focus on integrating students into roles created by the growing economy in order to increase human capital (Bowles & Gintis, 2007: 62). That has been done by re-positioning education as a product benefitting the market instead of an activity that benefits the public (Marginson, 2011: 47).
- The increased discourse of competition (a core ideal of neoliberal thought) in the public sphere, with the creation of winners and losers, has arguably reduced the focus on issues of equity in the public education space (Potterton, 2020: 169).
- Overall and dominant market-like structures within public education have drastically changed views about role of the state in society, along with a decreased faith in the state's non-rivalrous ability to provide quality provision (Jessen & DiMartino, 2020: 242).
- Market mechanisms like school choice have introduced languages tied to the 'proactive consumer' within public education spaces, subtly shifting the commitment to equal and non-excludable access (Potterton, 2020: 170).
- The growing privatisation and commodification of public assets has changed the function of the state to one that *enacts* redistributive policies (Harvey, 2006; McGregor, 2009).

Jessen and DiMartino (2020: 256) note that a key consequence of market-based reforms since the 1980s has been the deregulation of the state. In arguably lessening bureaucratic control, this has allowed for the globalisation of policy and allowed private participants to engage in debates about the 'public good'. Indeed, the shift to a more neo-liberal approach has transferred the responsibility of the state to provide public services to the market and to other non-state actors and led to a re-organisation of what is understood to be 'public values' (Rose, 2007: 47, Draxler & Steiner-Khamsi, 2018: 24).

At the international level, with the increase in private participation in public education delivery and in the absence of full state funding in developing countries, participation of private and philanthropic organisations has not only become more justified, but more established (Ball &

Youdell, 2007: 21). Non-profit organisations in particular have become an intrinsic part of debates on public provision and public governance at the local level (Hall, 2000: 10-11).

As such, the traditional view of education institutions and schools needing to espouse the cultures and values that allow students to think critically, embrace democracy, and try to intervene in the world order to expand the ideals of justice, equality, and democratisation, has endured widespread attack (Giroux, 2012, Giroux, 2003). The meaning of 'education as a public good' has not only shifted within the dominant neoliberal framework, but also brought with it a discourse focused on the kinds of 'skills' required for businesses, with education becoming a commodity that has to be bought and sold, in order for education to 'retain its value' (Spreen, Stark & Vally, 2014: 2-4).

The Privatisation of Education

Given that education in the current global economy is a business that is worth trillions of dollars in both developed and developing countries, the reorganisation of education through private means has enormous implications for how public education and its purpose is currently being understood (Rose, 2002: 15).

As Jessen and DiMartino (2020: 256) have noted, the entry of the 'private' and its advocates into debates about the 'public good' has opened the door for numerous non-state actors to re-organise public education provision and also to narrativize a different story about what constitutes 'public good' and 'public values'. And with the shape and form of public education being somewhat altered, this has challenged what is understood to be the traditional role of the state and who should be involved in the provision of education. These changes have happened at the level of policy debate and the discourses that shape the debates, as well as at the level of decision-making at the local levels where discourses of commodification have reorganised and repurposed the ways in which local providers speak about education.

According to UNESCO (2015: 73), the move to the privatisation of education from the 1980s was at first seen "as the process of transferring activities, assets, management, functions, and responsibilities related to state or public education to private individuals and agencies" which included community-based groups, religious institutions, NGOs, and corporations. Private providers were thus those 'managed and controlled' by non-government organisations or those whose governing bodies were not elected by a public agency (UNESCO, 2015: 8). This has changed significantly with new policy forms and initiatives such as voucher schemes, contracting our educational services, and the increase in number of public-private partnerships.

Ball and Youdell (2007: 8-9) identify two forms of privatisation in education, namely endogenous and exogenous privatisation. Endogenous privatisation entails the embedding of ideas or practices from the private sector within the public sector, in ways that promote particular forms of market behaviour thinking. More importantly, it involves the introduction of a particular language and a set of identities within education which organises how teachers, students, and their parents negotiate educational spaces (Ball & Youdell, 2007: 10). This is accompanied by the introduction of languages of school choice (competition) and quasi-markets (management) that operationalise mechanisms that focus on overall performance standards (Ball & Youdell, 2007: 20). Endogenous privatisation also brings into play other languages such as accountability, effectiveness and school improvement that implicitly suggest that 'privatised education is a solution to public inadequacies' (Ball & Youdell, 2007: 20).

Exogenous privatisation is more explicit and opens public education up to participation from the private sector. For example, when the scope and impact of the private sector becomes so prominent at both the national and global level that it influences how education organisation, management, and the delivery of education is envisaged (Afridi, 2018: 9), and even changes how the role of trade unions for instance is conceptualised and their capacity to negotiate reconfigured (Ball & Youdell, 2007: 10).

Locatelli (2018: 5) asserts that the trend towards privatisation actually intensified when states needed to meet key international goals or benchmarks such as achieving Education for All (EFA). Another example is when the Millennium Development Goals (MDGs) were replaced by the Sustainable Development Goals (SDGs) for the creation of a new framework for development to deal with global inequalities. Education was placed at the centre of SDG4 in 2015 as a way of transcending national boundaries and informing a globalised education policy discourse (Sayed et al., 2018: 187-200). Nation states actually used privatisation to address many of the big policy challenges tied to the rapid expansion of education at the various levels, the lack of public funding for education, out-of-school children, and to respond to the general failure of governments to provide quality education (Locatelli, 2018: 5). All these factors were used to justify the greater involvement of non-state actors in education.

Privatisation therefore involved more than just the modern state giving up capacity to manage educational problems, but rather also acted as the main policy tool that created the conditions for a collective of innovations, partnerships, and organisational changes within education to emerge. Differential participations also reworked the concept of quality education into a potential object of profit (Ball & Youdell, 2007: 10) that changed the interface of education

with students and society in a profound way. This shift was one from experiencing education as a public good (in non-rivalrous and non-excludable way and serving overall society) to a private economic good primarily serving the individual and something to be 'consumed'. This had implications for how educational access and educational outcomes were understood, and how equality and social justice were reconceptualised (Ball & Youdell, 2007: 13).

Indeed, the traditional distinction between the public and the private sector in the current political moment seems substantially collapsed (Mazawi, 2013). Given the different forms of privatisation in public spaces, the variety of non-state actors involved in education, and the diverse sources of funding available, the distinction between public and private has become somewhat blurred. Drache (2011) argues in this regard that the greater interaction of the state, business, civil society organisations, and households have led to the expansion of the public domain, which suggests that more attention is needed on how to regulate and control the use of public funds and the management of the public education system. A number of scholars suggest that the choice is no longer between the modern state and the market, but rather about how democracy itself can be protected from the new definition of the role of the state and whom it primarily serves. With the idea of education as a public good difficult to pin down, the role of the modern state itself is difficult to align to the concept of the 'public' (Rizvi, 2016).

The emergence of Public-Private Partnerships (PPPs)

The World Economic Forum launched a Global Education Initiative (GEI) in 2003 formally proposing the idea of 'comprehensive partnership' between government, business, and civil society in an effort to achieve the Sustainable Development Goals (SDGs). The rhetoric around partnerships however seemingly emerged in developed countries in the late 1980s with the rise of neo-liberalism and the emphasis placed on a low-tax economies and the projection that private enterprise initiatives were more efficient. The push for greater economic well-being and greater efficiency was a core goal of the Washington Consensus focus on economic growth in 1989.

It could be claimed that the Millennium Development Goals (MDGs) and its attempts to address worldwide poverty in Goal 8 then played a key role in encouraging 'global partnerships for development' (Global Education Initiative, 2012) and opened the way for donors, financing agencies, government, and civil society to enter a much closer conversation and social compact (Sayed et al., 2018: 192). As such, the need for modern states to create capacity for provision that they were struggling to provide, encouraged the increase of significant non-state provision (Rose, 2007: 38; Miraftab, 2004: 92).

Verger, Fontdevila and Zancajo (2016: 10) note that the different types of privatisations and their connection to public institutions became compounded by complexities attached to public-private partnerships. This entailed the subtle introduction of the private sector into what was (or has traditionally been) the influence and responsibility of the state.

Public-private partnership (PPP) agreements are between the state and a private sector operator for the delivery of a service to a public institution (Burger, 2006). Often public-private agreements are tied to concerns about educational performance where private providers are introduced within public institutions to improve 'delivery' and provide support that is perceived not to be forthcoming from the state (Mathonsi, 2012: 5). Afridi (2018: 9) and Lingard (2020: 273) observe that these partnerships are mostly couched in discourses that suggest that PPPs are more cost effective, cost-efficient, and offer the possibility of better quality education, without abandoning the notion of the 'public' completely. Moschetti and Verger (2020: 65) note that such partnerships are especially prevalent in low- and middle-income countries where, PPP proponents argue, there is greater need for economic efficiency and the improvement of education quality and equity.

Robertson et al. (2012: 9) suggest that international bodies and agencies are often complicit in developing countries embracing the PPP-model as part of their education reforms with the promise of further aid. For example, the International Commission on Financing Global Education Opportunity are quite explicit in saying that financial resources would be forthcoming if education funds are shown to be better invested and efficiently spent, and where states show keenness to connect with partners that have a social responsibility towards the provision of quality education (The Learning Generation, 2017). As such, in a variety of contexts, governments and non-state actors have set up public-private partnerships in ways that have mimicked the logics and discourses of the private sector (particularly with regard to design, management, financial models, and delivery) within public education settings (Ball, 2007: 4). Key examples include charter schools in the USA, academy schools in the UK, and collaboration schools and low-fee private schools in South Africa (Verger et al., 2016: 7).

Public-private partnerships, with its emphasis on decentralised control, do not mean that ownership is transferred from the state to private providers. Rather, they introduce new processes of decision-making between central and local state agencies in relation to public education provision. Public-private partnerships claim to bring different levels of coordination, financing, and control of education services into the structural delivery of education that would make recipient education institutions more effective and more efficient (Miraftab, 2004: 91;

Verger et al., 2016: 7; Termes, Brent Edwards, and Verger, 2020: 100). A key unexamined assumption tied to PPPs is that through these partnerships overall wealth within the system is equitably shared and distributed (Miraftab, 2004: 91). A further assumption is that private sector contributions bring positive change to impoverished and struggling public sector contexts and are driven mainly by social responsibility agendas (Global Education Initiative, 2012; Robertson & Verger, 2012).

Rose (2007: 39) suggests however that, rather than being pro-poor and focused on social responsibility, PPPs are mainly driven by tax concession incentives and other such subsidy benefits. As such, a big challenge tied to public-private partnerships is how modern states are able to monitor such partnerships and establish mechanisms that protect 'public good' education principles and priorities (Verger, Fontdevila & Zancajo, 2018: 269).

It is through public-private partnerships that the participation of older (and more traditional) non-state and not-for-profit entities have become most pronounced. New models of PPPs have both increased opportunities for independent actors like philanthropic organisations to get involved in public education, and offered alternative and different ways of supporting the participation of the 'public' and providing education for this group.

The establishment of Public Education Provision in South Africa

In his various edited books on the history of education in South Africa, Kallaway (1987; 1997; 2002; 2012; 2016; 2021) and a variety of other established and associated authors over the past thirty to forty years offer fairly comprehensive insights into the nature of church/ mission/private and public education, tied both to the country's colonial history and legacies, the emergence of a more formal modern state from the 1940s focused on socio-democratic service deliveries, and the convergence of ideas on modernity and apartheid around 'public' education in the second half of the 20th century.

Kallaway (2021: 41) notes that "the policy and practices of mission education and the increasing engagement of colonial governments within the field of education" needs to be seen as part of a larger international debate on mission churches in the 19th century and early 20th century, and the demand on different (private) churches to provide increased schooling in different and complex contexts. As such, mission churches must be recognised for its important role in the shaping of education policy and its 'public' and 'private' provision in South Africa over time, especially in a period when what is understood as 'state authority' was still very weak (Kallaway, 2021: 42).

> In the Cape Colony, for example, throughout the 19th and 20th century, the dominant tradition of missionary education stressed the need to ensure that schools for the indigenous peoples offered the same curriculum and education of the same quality as schools for the colonists. This ensured that the products of the education were eligible to be citizens of the Colony and that the few who were fortunate enough to receive such an education in mission schools entered the labour market with educational qualifications formally the same as those of the settlers (Kallaway, 2002: 10).

As part of the church responses to changing political, economic, and social environments in South Africa, it was in fact the mission church initiatives in Asia, Africa, North America, Oceania, and Latin America that had helped shape thinking about education for the 'indigenous communities' in quite fundamental ways. In doing so, the church engaged with bigger emerging debates around "pragmatism and utilitarianism relating to progressive education in the United States, and the quest for social democratic forms of education in the United Kingdom and Europe as part of a policy response to socialism, nationalism, and totalitarianism by the 1930s". Churches also played key roles in addressing important social developments associated with industrialisation and its impact on urbanisation, poverty, and various cultural changes and challenges (Kallaway, 2021: 42).

As part of the above processes, the shift in church participation in education from its 19th century mainly-religious focus on 'individual salvation' and 'conversion' to a more 'social gospel' approach in the 20th century was very much tied to the new regard for "public authority and government as a key instrument for building God's kingdom on earth" (Bebbington, 2003: 29, as cited in Kallaway, 2021: 43). Important church figures noted at that time that it was crucial that overall education provision be extended and expanded if citizens were to be developed in ways that not only 'enabled' their freedom but also gave them the confidence to pursue that freedom (Kallaway, 2021: 43). Much like in the UK with the Hocking Report of 1934, it was noted that:

> If the church or missions embark upon a policy of social help it cannot stop short of questions of general justice and the moral foundations of world order" (Cited in Kallaway, 2021: 80).

What became known as the 'social gospel' approach thus morphed thereafter into understandings of 'community development' within the British Colonial Office policy approaches, whereby the church sought to embed the greater potential role that Christianity

could play in 'public education'. In this period a template for educational thinking was developed for the 20th century whereby Christian education became linked to secular education in ways that shaped how missionary education and private provision was being conceptualised and offered in local contexts (Kallaway, 2021: 46).

Notably, as state authority grew and "as the costs of education started outstripping the resources of the missions and the demands for mass education came to linked to nationalist demands for political and economic rights" there then emerged *increasing co-operation* between church and state in the different colonial contexts.

The main benefit of cooperation was that while mission churches struggled to meet the demands of their followers for social, medical and educational support, the colonial state was also not yet ready to be the main provider of public social provision (Kallaway, 2021: 41; 44).

> "The rise of the modern state and the state provision of social services, medical care, and education then posed a threat to the traditional role of the mission and provided a solution to the overwhelming demands that were being put on the missions. This promoted greater co-operation between Church and state – but the question was increasingly about the terms upon which cooperation would take place" (Kallaway, 2021: 47).

This emerged at a time in the mid-20th century when there was a "loss of confidence (within the Protestant church) in the project of imperial power and a search for new explanations for the role of Christianity in the modern world", where the Church sought a "re-evaluation of the values of life in Western capitalist societies as well as the role of the mission within the colonial realm" (Kallaway, 2021: 46).

The key point is that educational policy development in South Africa in relation to missions, government, and the colonial project in the 20th century, took place against the background of the construction of a larger emerging mass education project, where the 'evangelism of church service' over the 20th century came to be interpreted as 'social deeds' and 'public achievement', and where education came to be seen as having a public value of its own, apart from having an evangelical purpose. As such, mission education and mass or 'public' education in colonial South Africa by the 1930s was never quite two completely separate systems of provision and were arguably connected in the pursuit of education around key social and moral societal ideals.

This partly created the platform for state and church missions to negotiate ways of tackling difficult social, political, and economic challenges after 1945 when new questions about the goals of 'public' education provision re-emerged under the guise of apartheid education policy, and questions about whom apartheid education provision was to serve, and for what purpose.

Kallaway (2002: 11) asserts that apartheid education, "for better or for worse, brought modern mass education to a newly industrialised South Africa, although the nature and quality of the education left a great deal to be desired". In that regard apartheid education policy already had a foundation on which to build of both a modernist focus (public values) and a Christian religious ethos (private and individualised).

While education provision for the 'indigenous communities' (African) had mainly been provided by the churches before the 1950s, with the victory of the National Party in 1948 the apartheid state intervened in various services of mass provision. After 1948 the apartheid state intervened in education whereby it "provided a minimum of 10 years of schooling for whites, made provision for mass African education, and addressed issues of culture, tradition, and language considered to be of vital importance to good educational practice". In so doing it championed both the provision of (a version of) secular education and the shutting down of missionary control of schooling. This arguably brought an efficient and modernised education structure into play that served various sections of 'South African student communities', but in different ways. State centralisation of Bantu Education from 1954, for example, sought to mainly promote African culture and to reorientate the new mass education system for African students towards rural life and work in rural areas, while 'white students' in the 1950s received an average of 20 times more per capita funding and were prioritised and supported by the state to find skilled work in urban areas (McKeever, 2017; Christie, 2008).

The shift to (apartheid) state control did ironically introduce a more liberal Keynesian-like state model within state schools - where all students were offered 'public' education albeit of substantially different quality and comprehensively benefitting the white minority (Kallaway, 2002: 20-25). The logic of 'separate but equal' provided the apartheid state with the framework to establish state education within the Department of Native Affairs, the Coloured Affairs Department, and the Indian Affairs Department in the 1960s, alongside embedding the establishment of a notion of 'public' education within the 'separate development' homeland system. This later shifted form in the 1980s with parliamentary recognition as the House of Assembly, House of Representatives, House of Delegates, and the Department of African Affairs. All of these different forms of state provisions were guided by a particular

understanding and approach of ‘secular’, religious’, and ‘public’ education being provided for the broader and various student populations.

Notably, whereas the politics of the late 1940s sought to open the prospect of a modern economic social order - or a South African version of the western, social democratic Keynesian consensus prevalent at that time - from the 1950s apartheid policies focused on state provision sought to mainly pursue this for the benefit of the white population. While a change in tone was evident in social policies, poverty relief, healthcare, housing, welfare labour controls, urban development, education provision, and school feeding in the late 1940s, apartheid policies thereafter sought to redefine these services and the notion of the ‘public’ in a manner that was selective and ‘representative’ only of certain individuals considered ‘public citizens’ (Kallaway, 2002: 13). The development of a ‘systematic scientific approach to replacing mission control of black education with state control similar to what was happening in other postcolonial contexts’ was regarded as ‘a rationalisation and modernisation of educational policy’ and in keeping with the social democratic liberal public policy ethos prevalent in that period (Kallaway, 2002: 17).

Twenty years later, in the 1970s, as grand apartheid started to fail amidst regional insecurity, significant financial constraints, and internal resistance, there was a shift to developing a ‘more inclusive notion of white nationhood’ in South Africa and finding the best framework around which to develop a robust economy. This required a stronger focus within apartheid education on the reform of ‘public’ provision and the incorporation of the business sector in the thinking of education and the need for skilled workers. By the 1980s educational policy discourse was starting to get entrenched in dominant international discourses of deregulation and quasi-markets that had huge implications for political changes in 1990s South Africa, and for what would come to be understood as ‘public and private education’ thereafter (Kallaway, 2002: 18).

With the late-1980s-early1990s under apartheid came a ‘marketisation of education’ that sought to ‘dismantle liberal, democratic, welfarist agendas’ and replace them with more benign agendas focused on fiscal austerity and capacity challenges tied to the shift away from previous authoritarian-type apartheid ethos (Chisholm, 2004: 14). The outgoing apartheid state also sought to embed a different kind of ‘public’ educational apparatus that would protect and serve the interests and needs of those privileged before.

However, as Christie (2008: 11) notes, in the post-1994 period education provided by the new state was from the outset seen as an important vehicle by which to undo many of the injustices and inequalities perpetuated under apartheid.

> "The architects of post-apartheid South Africa understood that a restructured state education system would be just as critical to the building of a new and democratic social order in South Africa as its predecessor had been in the sustaining of apartheid. Central to the new democracy was the guarantee of a basic education for all and the deracialisation and unification of the overall education system" (Fiske & Ladd, 2004: 59)

Chisholm (2004: 13) observes however that the pursuit of a social democratic order within which education 'could and did begin to play a role in promoting upward social mobility for all' often came into tension with the quest by a new compliant national middle-class that was focused on getting access to previously white privileges and that wanted to create 'conditions where little change would occur through and in education'.

This meant that 'the right balance' was being looked for between public and private resources to fund the provision of primary and secondary education for larger populations. This development in educational thinking was very much part of the global policy agenda at the time, with the *Jomtien World Conference on Education for All* making it clear in 1990 that because of limited tax-generated resources that national states would have to find new ways of funding 'public' education (Fiske & Ladd, 2004: 57).

As Fiske & Ladd (2004), Christie (2016), and Badat & Sayed (2014) note, education after 1994 came to be seen as having a key role to play in achieving redress in society, and equality within education. As such, the previous system of racially-defined departments of education across the South African landscape (including the previous homelands) was abolished to establish a single 'public' education system. This was the first time that public education had become compulsory for all African students across the full South African geographical landscape.

However, 'the post-apartheid government also made an explicit decision (in 1996) to encourage public schools to supplement public funds with school fees' (Fiske & Ladd, 2004: 57). In so doing the state 'inserted a discourse of the private more firmly into the public space'. The decision to introduce a school fee-based policy was based on the limited public resources that were available to provide education to a hugely expanded student base, the pressure from outgoing apartheid-bound ideological groups for more local-based control of education, and

the fear that the public education system would not be able to embed the social democratic and 'social gospel' philosophies of previous eras if the concerns of all communities were not addressed. The biggest fear was also that the white middle class (and the student constituencies they represented) would rather seek refuge in private school environments, which would impact on the social solidarity ethos that the new government wanted to embed within a public school system committed to serving all students.

The state decision to encourage a fee-strategy was also informed by developments that were initiated by the outgoing apartheid government before 1994, namely the establishment of Model A, B, C, and D schools, and being wary of the legal implications of simply dismantling the most recent iteration of public education provision in South Africa.

Sayed (2001: 4) observes that this led to significant deregulation of a key state asset (education) and the development of a system of public schools and independent schools, where the financial structure of ex-Model C schools was encouraged to be the main model that public schools should follow. The Model C system was also the model that prior to 1994 during the transition to a new governing dispensation had been adopted by all public schools that served white student communities. As such, it was portrayed as a compromise to retain an existing public school system but with a 'private dimension' tied to the overall funding thereof.

Christie (2008: 156) asserts that these educational changes, made after 1994, were made to advance participation in the global neoliberal marketplace and mirrored many of the qualities of a modern capitalist state using a market economy approach (Christie, 2008: 156). As a feature of the modern capitalist state, the purpose of public schooling was thus both to 'socialise' and to focus on how students got access to varying forms of work (Kallaway, 2002: 2). Sayed (2001: 4) observes that the new integrated system of schooling thus introduced policies that advocated change based on equality and human rights, and on the need to develop human resources for the new economy.

It is argued that, applying the international analyses of Lipman (2006), Miraftab (2004), Zajda (2006), Rose (2007), and Draxler & Steiner-Khamsi (2018), this approach opened the South African public education system up to forms of investment and private endeavour that began to reframe social relations within and between public schools, and changed discourses around what constituted knowledge according to the needs of the market. It introduced the concept of diversification in the provision of public education alongside a diluted concept of 'quality education' in ways that firmly locked public education into a discourse of global

competitiveness and the need to offer the individual student with an education service that connected them to sustainable work (Christie, 2016; Badat and Sayed, 2014).

Notably, in the 2020s the reluctance of the South African state to invest more in the provision of public education can be seen in the minimal increase made to public education spend within the national Budget. Trialogue (2020) notes for example that the national budget only increased from R375 billion in 2019/20 to R385 billion in 2020/21.

It suggests that persisting inequalities, together with the increased pressure to better participate in global markets, created new conditions for private actors and 'third way' participants to step in to either provide funding for education, or to offer actual educational services within public education institutions (Draxler & Steiner-Khamsi, 2018; Christie, 2020).

With respect to the new independent school sector the new *South African Schools Act of 1996* (SASA) notes that 'any person may establish and maintain a school albeit at his or her own cost', which in 2000 constituted a sector with only 2.1% of students in the country as a whole (Fiske & Ladd, 2004: 59-60).

Section 2: Philanthropy And Education

A short description

John Gardner (cited in Flatto, 2015: 1011) observes that *"wealth is not new. Neither is charity. But the idea of using private wealth imaginatively, constructively, and systematically to attack the fundamental problems of mankind, that is new*".

Modern philanthropy, or 'professionalised giving', has its recent origins in the West (USA and Europe) and is mostly associated with large multi-national corporations and foundations. Until recently, the study of philanthropy has typically been conceptualised as a narrow field tied to social work where the focus has been on helping the disadvantaged or as part of the non-profit sector's focus on assisting with socio-educational institutional issues (Habib & Maharaj, 2008: 23-24).

The word 'philanthropy' comes from the Greek word *philantropia*, which means the 'love of mankind'. Hall (2000), Fernandez (2011), Daly (2012), and Farley (2018) observe that while philanthropic practices have their roots in the ancient world, it was developments in the 15th and 16th century that gave rise to what is currently known as 'modern philanthropy'. With the collapse of rural feudalism and the rise of urban centres, the locus of philanthropic endeavour shifted in this period from religious to state powers. With subsequent wars and revolution in

the 18th and 19th centuries this led to the greater focus on improving the quality of human life of those most 'vulnerable'. In this latter period, philanthropy sought to advocate on two fronts, namely pushing for reform at the societal level through private efforts and taking some public responsibility to assist people in need. This was followed in the 19th century by a focus on 'almsgiving' that inspired the development of 'progressive' philanthropy – where rich benefactors were pursued to distribute their wealth for the benefit of the 'public'. It brought into being a professional class of philanthropists that sought to oversee the transfer of funding and support from the rich to the most vulnerable (Farley, 2018; Fernandez, 2011; Daly, 2012; Hall, 2000).

The early 20th century witnessed the rise of 'scientific philanthropy' via influential philanthropists such as Rockefeller and Carnegie and their funding foundations, where business models and private monies were combined to arguably contribute to the social welfare thrust of emerging modern states, especially from the 1940s (Erdem & Kenneth, 2000: 134). The emergence of 'scientific philanthropy', alongside 'private philanthropy noted above, came at a time of enormous strife across the world with the end of the Second World War. It led to greater collaboration and formalisation of philanthropy at the time (Erdem & Kenneth, 2000: 134; National Philanthropic Trust, 2016), as well as a steep shift towards engaging with the modern state rather than with the beneficiaries themselves.

Corporate donors and private benefactors in that period had no social interaction with those they sought to assist and tended to focus on the political and financial gains that came from their contributions. Philanthropic participation thus did not necessarily imply social commitment at the local level (Hall, 2000, Reich, 2020).

It was when the political hegemony of the welfare state started to wane from the 1980s that a policy shift occurred within philanthropy, namely from a political to a more social focus. This shift was aided by the growth and development of non-profit organisations from the 1980s that were trying to intervene at the local levels with the fallout of economic recession and increasing poverty across different contexts. Their increasing reputation as 'trying to make a difference' in the lives of the poor and the vulnerable led to both modern states and funders 'starting to recognise' their efforts (Haydon, Jung, and Russell, 2021).

Then, as part of the neoliberal project and the attempts by the private sector to make inroads into public provision at multiple fronts, private funders became drawn to the tax-exempt status and other incentives tied to NGOs at the dawn of the 21st century. Most importantly, as part of

their funding private funders pushed for the adoption of private sector values within the philanthropy sector, seemingly to ensure sustainability and scalability of the various efforts being made in societal projects. They also insisted on outcomes that could be measured according to their market-driven ideals (Haydon et al., 2021: 353).

This merger of for-profit and non-profit goals in the 21st century has been described as 'venture philanthropy', 'impact investments', or 'philanthrocapitalism' (corporate social responsibility); implying there is a shared belief in applying the tools from the private sector to improve the performance and outcomes of philanthropy (McGoey, 2021: 2). This latest development in the evolution of philanthropic form has raised questions about its 'voluntary', 'social obligations', and 'good for the vulnerable' pedigree, or whether it has reverted to 'its private act of giving' roots. More than ever before, philanthropy in its current form comprises of very different institutions to the past; more organised and professionally managed (Sulek, 2010; National Philanthropic Trust, 2016).

The modern form of Philanthropy

The astonishing growth of philanthropy in the past century raises the question about the overall role of philanthropy and the values driving its activities. In this regard, Reich (2014: 418) notes that it is important to differentiate between charity and philanthropy, where charity includes activities that mostly bring direct relief of suffering or provide the disadvantaged with basic needs, whereas philanthropy is the more formal attempt to address the root of the social problem.

Reich (2014: 417) observes that in trying to address larger issues, the benefit for philanthropy (as opposed to state provision) is that it is less inhibited by institutional and other regulations and has greater economic liberty to effect "a bottom-up civil society solution to the noted problems". This gives philanthropic efforts the opportunity to set about 'improving communities', or building schools, providing relief for victims after wars or natural disasters, or focusing on larger questions such as the improvement of quality education, and organising ways of how to do this. The National Philanthropic Trust (2016: 1) defines philanthropy in this space as "*the practice of organised and systematic giving to improve the quality of human life through the promotion of welfare and social change*".

In defining the main mission of philanthropy - what it does and what is distinctive about it - Payton and Moody (2008: 4) note that philanthropic initiatives are more than simple reactions to the failures of other sectors in society. Rather, philanthropy has dimensions that include:

- Moral actions that respond to human problematics,
- Representations of social histories that display moral imagination,
- A firm focus on values that push for a free, open, and democratic civil society (Payton & Moody (2008: 7).

Yet, they note that the formalisation of philanthropy in modern times, and the blurring of boundaries between the non-profit and private corporate sectors, introduced 'industry lingo' like 'social enterprises' or 'social entrepreneurship' that enabled individuals and business funders to focus on what benefitted them and to apply their preferred principles. Investing in non-profit sectors was as much about altruism as how to transform the non-profit space and to benefit from associated tax concessions (Payton & Moody, 2008: 8; Habib & Maharaj, 2008; Sulek, 2010).

In the latter regard, new tax regimes were part of a legislative framework that regulated the financial, taxations, and other administrative activities of philanthropic organisations. For example, in South Africa an established non-profit company is governed by the Companies Act and is subject to 'legally binding rules that provide clarity' on governance and financial issues (The NPO Lawyer, 2019). In South Africa the Non-profit Organisations Act (No. 71 of 1997: 5) provides an administrative and regulatory framework for non-profit organisations to conduct their affairs and to meet the diverse needs of South Africa encourages organisations to adhere to particular standards of governance, transparency, and accountability.

Selenica and Novelli (2021: 8) suggest that the cumulative effect of reduced state funding and global incentives for quality education opened public education provisions to the interventions of 'philanthrocapitalism' and the increased involvement by various actors on global and local levels (Tarlau & Moeller, 2019: 5). And it is against the background of the latter developments in philanthropy that the growth of public-private partnerships should be viewed, where in their efforts to arguably achieve better-quality institutional and living situations, philanthropy became a fundamental part of "*the application of private means to public ends*" (Sulek, 2010: 201). It is also against the above background that the intersection of the 'public good', private endeavour, and philanthropy came to change the nature and form of educational experiences and associated debates (Sulek, 2010: 202-203).

Philanthropy in South Africa

Everatt, Habib, Maharaj and Nyar (2005: 286) caution that current philanthropy in South Africa should not be reduced in simple ways to what is understood as formal or institutional

philanthropy, but rather as 'philanthropic flows' traditionally operating in both vertical and horizontal directions across society and operating differently at various times.

Philanthropic work for example was quite prevalent amongst many African communities in the 19th century, with many faith-based organisations funding various philanthropic activities in different contexts. Most of the latter started off as part of colonial ambitions to 'save the souls' of the indigenous South African people, but then later developed into the provision of actual health and education services and facilities- both formal and informal (Kallaway, 2002).

Under apartheid, philanthropic efforts tended to focus more on human rights issues and assisting those struggling under the wrath of apartheid political and social aggression. Especially from the 1970s a variety of international donors became closely linked to the struggle against apartheid, increasing their financial and other support in the 1980s based on the savagery of the state of emergencies. This aided the increase in number of philanthropic organisations focused on service delivery across health, education, welfare, and corrections.

From the 1980s however, with the need for more formal interventions and programmes, the approach of philanthropies shifted significantly away from 'charitable-like instantiations' towards a form of 'modern philanthropy' that encouraged participation in a variety of causes, new policy developments, and overall advocacy work. In this period the focus shifted to how to effect more strategic change paradigms and how to use philanthropy in service of solving dire social problems (Citadel, 2013: 19-23).

The increased role and contribution of philanthropic organisations at that point should not be underestimated. In the 1980s the level of poverty and hardship was significant, with the majority of the South African population living in dire conditions, and with inadequate state support. The bifurcated 'welfarist' system in place under apartheid had meant that the white minority population had received most of government spend, with much of the rest of the population requiring philanthropic or non-governmental support to be able to address their daily challenges. Kulijan (2005: 4) asserts that philanthropies came to play a crucial role in addressing poverty needs, promoting concerns around human development, and focusing attention on the need to gain greater equity in society.

After 1994, the state and extent of poverty and inequality in fact increased. Bisseker (2019) notes that an estimated 49% of South Africa's population continues to live in chronic, persistent poverty with an additional 11,4% living as 'transient poor' and 19% as part of the 'vulnerable middle class'. This heightened demand for citizens to have their needs taken care of at the very

basic human level has created the conditions for more formal philanthropic participation in South Africa, with a wide range of philanthropic groups.

A key problem since the 1990s however, due to changes in the nature of the state and the role of the state under a neoliberal framework as evidenced in South Africa's macroeconomic strategy (Growth, Employment and Redistribution - GEAR), has been the prioritisation of economic growth in the for-profit sector (Berg, 2013). This has led to funding for non-governmental organisations (NGOs) drying up and causing a greater dependence on corporate sources of funding. This has been a worldwide phenomenon (Rose, 2007: 38). In South Africa, according to Citadel (2013: 43), those organisations that did not make the transition had sources of funding severely diminished, which led to their demise.

In the current philanthropic environment in South Africa, the key stakeholder groups tend to mainly include individuals, private trusts, and corporate foundations. They also include wealth managers that serve the grant-making sector, and philanthropic promotion initiatives that seek to develop philanthropic infrastructures or beneficiary organisations.

Ritchie (2019) notes that Corporate South Africa is one of the biggest funders of non-profit organisations in South Africa, with 22% contribution coming from business or the Corporate Social Initiative (CSI). Habib and Maharaj (2008: 31) show how the massive rise occurred in the period 1990-2005, with corporate giving becoming a strategic drive within corporations to help assist their financial bottom line. 'Strategic philanthropy' or 'institutionalised philanthropy' became tied to corporate social responsibility after 1994 to increase the value and produce real benefits for corporations.

Amongst the various strategic interventions and initiatives, education remains the choice sector for South African donor contributions. Education is listed as one of the top 4 non-profit activities in the country (Ritchie, 2019; Citadel, 2013). Trialogue (2020: 102) reports that the total estimated CSI (corporate social initiative) expenditure in 2020 was R10.7 billion, of which R5.35 billion goes into education.

According to the Trialogue Handbook (2020: 102), of the more than R5 billion spend on education, about R1.39 billion is spent on the provision of *bursaries and scholarships* to students along with support for the establishment of university research chairs.

Philanthropy as 'game-changer'

New philanthropy is globally playing a far more direct and active role within the funding of education. In the past philanthropy was typically regarded as a 'third space' or player,

characterised by beliefs of neutrality and altruism, and lodged somewhere between the public and the private (Srivastava and Baur, 2016; Salaman & Anheier, 1992). However, within its new formulation philanthropy is playing a key role inserting the 'importance' of private values into the public space, and in so doing is changing how privatised activism and civic engagement is being understood (Hall, 2000: 26)

Increasingly positioned as social interventions, philanthropy is punted as crucial to efforts to offer greater educational access, the eradicating of poverty and the promotion of peace and security. Fernandez (2011:14) speaks about the new moment as the blending of charity with 'Corporate Social Responsibility' (CSR), while Tarlau and Moeller (2019: 6) note that the intervention of transnational institutions in education through corporate social responsibility programmes has reshaped what 'quality education for all' is understood as (Rose, 2007: 30-39). In particular, philanthropy has targeted students from low-income families and promised to give them a better chance of access to quality education without fully defining what 'quality education for all' would mean for them (Latham, 2009: 4).

And in so doing, the strategies of philanthropy have '*rendered educational equity and quality as a problem with solvable technical solutions'* (Tarlau & Moeller, 2019: 6). The blurring of the lines between 'business, enterprise, development, and the public good' has allowed philanthropy, as a non-market and non-state actor, to represent itself as a 'multi-stakeholder' intent only on the pursuit of activities that transcend self-interest, with a focus on the sum outcome of *private purposes* rather than individual goods (Srivastava & Baur, 2016: 436; Hall, 2000: 26).

Scholarships as a public-private partnership

Multi-stakeholders are mostly characterised within current policy thinking as those groups that pull public, business, and civil society together in public-private partnerships to achieve a range of societal improvement objectives (Latham, 2009: 3). For these groups structural inequalities and challenging injustices are not the primary concern (Daoust & Novelli, 2020: 2; Novelli, 2014: 38; Carnoy, 1985: 158). Rather, they seek, according to Novelli (2014), to change the ways that individual 'poor' students think about their futures and their future roles in society. In this regard, the influence of 'multi-stakeholder' groups in the social policy areas of education is best seen in the roles currently being played in the provision of *scholarships* to students from low-income households (LaRoque, 2008; Latham, 2009; Malik, 2010; Verger & Moschetti, 2017).

Key international corporations like the Bill and Melinda Gates Foundation or the Broad Foundation have 'invested' billions of dollars in initiatives to expand educational opportunities for low-income families in both developed and developing countries. Through their funding, they have sought to increase financial resources to schools, assist the capacity of schools to grow, prioritised the 'importance' of knowledge in and of the private sector, allowed governments to focus on core functions (such as quality assurance), and reinforced feelings of innovation and competition via the individual gains of scholarships (Verger & Moschetti, 2017).

Scholarships in South Africa[1]

'Education performance' is perhaps the most common concept or term used or referred to in South African policymaking circles in the 2020s. This is partly because, despite substantial capital investment from the state as well as from the private sector, education performance remains very low even in comparison to many other developing countries. The focus on education performance is also tied to international goals or 'suggestions' provided by international groups like the World Bank to increase access to education and quality education (Christie, 2008: 25-29). Public-private partnerships are offered as a 'innovative policy mechanism' for the South African state to address its crisis around education performance, particularly around the financing and delivery of education.

In that regard public-private partnerships are offered as a 'neoliberal model' for educational improvement, with Mathonsi (2012: 5) asserting that PPPs may provide opportunities that the state cannot offer, and Latham (2009: 4) noting that scholarships as educational philanthropy can serve as a useful 'policy idea' to give students from low-income families 'a much better chance of access to quality education'.

As such, scholarships as a public-private partnership in South Africa governed by private money is said to be provided as 'a common good' act of society, namely improving access and support to quality education. The 'acts of scholarships' are said to provide the opportunity and the resources to bridge the gap between the provision of physical and financial access to education and students achieving educational success, extending the definitional role of

[1] There is not one consolidated document mapping the range, scope and arc of private sector and philanthropic actors offering scholarship for education in South Africa. Although a few sources exist that provide some information, it should be noted that this does not include all actors. Please see appendix E for data collected from the 2022 Trialogue Handbook that provides some insights.

scholarships from '*providing financial aid'* to '*facilitating access to a range of different resources or capital*' (Wilbur & Roscigno, 2016: 4). Scholarships have thus become what Ball (2016) refers to as both 'endogenous' and 'exogenous'.

Traditionally, within university brochures and career guidance packs, the term scholarships were used interchangeably with the word 'bursaries'. It was generically described as 'a different means of financial aid' to assist students to gain access to education and awarded on a merit basis for high academic achievers, functioning as an incentive for deserving students to target success in particular areas like in sport. In some cases, the provision of scholarships had a 'financial need' component that then required scholarship recipients to work for the organisation after studies have been completed, or to pay back the financial aid should they fail their degree (Nelson Mandela University, 2018; Careers Portal, 2018).

However, with the shift to scholarships serving a more exogenous purpose, educational philanthropies in South Africa in the form of scholarships have tended to identify scholarship recipients according to their typical lack of access to education, financial resources, and information that would support students in their decision-making through further studies. In so doing scholarship philanthropies have sought to make both finance (access to funding) and social networks (knowledge and contextual understanding of opportunities and possibilities) available to students. Many have also set about social integration initiatives to help students navigate different social networks, to participate in different activities as a way of developing an academic consciousness that leads to academic success. Cabrera, Nora and Castaneda (1992: 583) suggests that by adopting a more holistic, integrated approach to providing support and intervention the 'new approach of scholarships' may address many of the limitations within mainstream education and presumably 'equalise opportunities' between high and low-income students on various levels in transformational ways.

The incursion of private sector thinking on the contribution of public education

The role of international (and national) organisations in the above regard must not be underestimated, especially in relation to the various levels of international, national, local, and personal interdependent relations. Many state policies have been caught up in a set of international pressures that have developed a common approach to competitive global knowledge economic agendas and the global dissemination of education values that encourage the spread of privatisation in education throughout different local contexts (Verger et al., 2016:

18). This has had different policy and socio-educational implications for the education sector (Verger, Fontdevila & Zancajo, 2018: 256; Tarlau & Moeller, 2019: 4).

Firstly, given the heterogeneity of privatisation in education, the various power relations between individuals, markets, institutions, and the state have changed significantly (Verger et al., 2016: 15). The Sustainable Development Goals (SDGs), particularly the "Education for All" mandate (Kenton, 2019; Carnoy, 1985), have prompted efforts to reshape public education through the mobilisation of power relations in specific countries (Tarlau & Moeller, 2019: 2).

Secondly, as an ideological mechanism the financial element of private provision (such as through scholarships) has changed how knowledge production in education is approached. It has also changed the different contextual starting points, mechanisms, and participating agents tied to the provision of private funding, whether this is for the establishment of low-fee private schools or for scholarships for students in need. In both the incursion of private funding is built on a discourse of state inefficiency, lack of capacity, and unwillingness to serve the needs of the most vulnerable students (Verger et al., 2016: 11; Verger et al., 2016: 23). And with the shrinking of the public education purse worldwide, the door to private incursion has certainly been substantially opened.

Scholarships must be understood in relation to these new developments. As an educational philanthropic initiative, the nature of ‘new scholarships’ has adjusted according to increasing educational demand, and the lack of overall financial support for public education.

This is further explored in Chapter 5, which examines how different youth navigate the various discourses tied to scholarships and how it influenced their lives.

Conclusion:

Novelli (2014: 14) notes that the reform of the public education sector in the 21st century has been mainly characterised by (1) decreasing national education budgets, (2) increased decentralisation, and (3) increased private sector involvement in public schools.

The literature review has tried to show how this has occurred over an eighty-year period and used the lens of private provision, philanthropy, and scholarships as the main landscape against which this has happened. From the shift from a Keynesian-influenced state to the onslaught of neoliberalism via the promotion of a free-market economy, education and schools has always been seen as the primary change agent.

As such, how the discourses around the role of schools and education have changed over time, and how market logics have been synched with public education thinking, is key to understanding current educational developments worldwide, and in South Africa. With the increased establishment of charter schools in the USA, academy schools (and academy trusts) in the UK, and collaboration schools in South Africa, the stage has been set for the complete transformation (and demise) of the as-previously-experienced public education system (Tarlau & Moeller, 2019: 4; Morgan & Volante, 2016: 14). In particular, the adoption of private sector values and principles have prioritised results, performance, and accountability as key mechanisms by which to rejuvenate the levels of human capital needed within different contexts (Morgan & Volante, 2016: 4). And 'choice' and 'efficiency' have been touted as adequate justification for the overall general public to support the various changes (Balsera, Dorsi, Termes, Verger and Diaz, 2016: 977).

The chapter has also shown how corporate and foundation investment in education and schools is a global phenomenon that has discursively grown at an unprecedented scale. The level of private sector investment and private financial portfolios has been phenomenal, with the strength and reach of their influence becoming ever more enticing to other private actors (Tarlau & Moeller, 2019; Balsera et al., 2016).

The changing role of the state in this context has remained crucial. But whether the state as a body will be able to regulate and monitor the work and contributions of private participants and providers within the public education system remains uncertain, especially in relation to the claim that the academic performance of students that access these new forms of education provision would improve (Balsera et al., 2016: 980-994). This also pertains to the state's ability to protect the overall public good, the public purse, and public assets from usurpation by the private sector (Ball & Youdell, 2007: 12).

It is questionable whether market mechanisms in education are reconcilable with the equity goals of public education (Moschetti & Verger, 2020: 80). Harvey (2006: 145) cautions here that the state may well become the agent through which the redistributive flow of assets from the upper to the lower classes is reversed. As such, Badat and Sayed (2014), Motala (2009), and Jomo, Chowdhury, Sharma, and Platz (2016) suggest that a balance needs to be found between public, private, and philanthropic contributions if inequalities in South Africa are to be adequately addressed.

How this plays out within the lives of many of the students who receive private funding through scholarships, and how this shapes their understanding of public education, is the focus of chapter 5.

In preparation for this discussion, given the changing form of the institutional system of education provision in South Africa alongside the challenges that students from marginalised communities address within their daily lives mitigate, chapter 4 (that follows) provides the conceptual framework that is used in the dissertation against which the student stories should be read.

The conceptual framework provides an outline of the political economy of education lens that is used to understand what the changed landscape of education may entail, as well as engagement with the work of Aslam Fataar and Crain Soudien in the South African context to explore many of the contextual and discursive life and identity challenges that students have had to traverse.[2]

[2] As the reader enters the Conceptual Framework, to create a clear link between this chapter and the next, it is important to note that when I began my study, the primary emphasis shifted towards focusing on the lives of the 22 students interviewed, rather than delving deeply into the nature of scholarships themselves. Consequently, I did not extensively explore the existing literature on grants for marginalised and impoverished youth. While I acknowledge that there is a significant body of relevant literature that exists, my research was more centered on the experiences of these 22 students which I hope to use in future research endeavors.

Chapter 4: Conceptual Framework

Introduction

The neoliberal political project has had a profound influence on education and the development of globalised neoliberal education policy as the dominant power discourse of the 21st century (Cardozo and Novelli, 2018: 237; Robertson & Verger, 2012: 38). As part of this discourse education has become positioned as a required 'new social contract' between donors and the state, where both contribute to broader societal issues and the development of new structures to address the needs of all students. Presented as more 'effective' and 'ideologically neutral', these new structures and partnerships have been set up as alternative or new ways of addressing the educational needs of students in public institutions (Srivastava & Oh, 2010: 467).

Srivastava and Oh (2010: 466-467) assert however that perceived neutrality in such partnerships depoliticise new mechanisms of provision and tend to homogenise different experiences and forms of resistance to them. They argue that it is crucial to find ways to better understand the effects of private provision on traditional 'public good' activities (Daoust & Novelli, 2020: 2).

For that reason, the current conceptual chapter suggests a cultural political economy of education approach that considers some of the social justice and socio-political dimensions tied to the provision of scholarships and other forms of private donor support within public education. It does so to grapple with the seeming collapse of boundaries between the public and private provision of education, but also how the provision of scholarships for marginalised students may have changed much of the narrative tied to quality education and its goals within the public education system (Bhanji, 2016).

The chapter further engages with the local spaces within which students experience education, offering concepts that may help understandings that different local spaces are not mutually exclusive nor are they homogenous. As Hopkins (2013: 11) notes, there is always a reciprocal relationship between students, their respective identities, and the spaces that they move through daily. And to understand these, it is important to recognise and grapple with the changed conditions of living for many young people. For Giroux (2002: 190):

> Youth increasingly rely less on the maps of modernism to construct and affirm their identities; instead, they are faced with the task of finding their way through a decentered

cultural landscape no longer caught in the grip of a technology of print, closed narrative structures, or the certitude of a secure economic future.

The chapter offers a conceptual frame to (1) understand some of the historical and political economy dimensions of public education provision and the discursive incursion of private funding, and (2) engage with the messy identity and translocal spatial conditions that students inevitably contend with in their daily educational experiences.

Political Economy of Education Analysis

Jessop's (1999) work on 'strategic relations' offers a useful framework to understand complex interactions between agents and structures within education. This approach recognises student agency but also acknowledges the role that structures play in limiting what is possible for them. Jessop (1999) suggests that the nature of various structures and processes shape the strategies adopted by different actors, and their interaction within the political, economic, and social (Daoust & Novelli, 2020: 2).

Cardozo and Novelli (2018: 235) propose that a cultural political economy of education approach repositions attention on the inequality of educational opportunity in relation to the specific dynamics of local conditions. It also allows key questions to be asked about the transformational value of education in such environments (Verger et al., 2016: 15), and how best to value the different nuances that allow for a degree of caveated freedom for students at the local level.

In this regard, Nancy Fraser (2005: 73) offers a framework by which to assess the nature and extent of some of the main macro-elements of educational thinking and change. Fraser (1998: 1) contends that modern claims for social justice needs to encapsulate dimensions of 'redistribution', 'recognition' and 'representation'. Although theories of distributive justice (culminating from liberal traditions in the late 1900s) and recognition (originally from the Hegelian philosophy) could be seen as contrary against one another, Fraser (1999, 2003) believes this to be a 'false antitheses' as neither are sufficient. According to her, these dimensions need to be reconciled for a nuanced understanding of the social justice required for modern society (Fraser, 1995, 2003). As a result, Fraser (1995, 2003, 2008, 2020) develops a critical theoretical framework that investigates systemic patterns of value that obstruct equal participation and proposes that the three afore-mentioned dimensions work alongside each other to address the 'double character' of injustice in the age of globalisation. In essence, Fraser (2001: 6) asserts that a socially-just society requires 'parity of participation' where everyone is

able to engage in social interactions as equal partners. To achieve this a political dimension (representation), an economic dimension (redistribution) as well as a cultural dimension (recognition) should be integrated and made to work alongside each other (Fraser, 2008: 15, Novelli, Cardozo & Smith, 2019: 71). A lack of economic resources, difference in social status, and disregard for people's political voice create informal barriers to justice and could lead to exclusion of certain groups to participate as equals (Musara, Grant and Vorster, 2021: 7).

Together these dimensions allow for an analysis of whether the needs of students are being suitably addressed systemically and institutionally, and whether the provision to students represent a commitment to the larger needs and 'good' of society. For example, according to Fraser (2005: 73) students can be included (or not) in the education system by being given access to educational resources, and also allowed to interact (or not) in institutional hierarchies that validate their recognition in the system (Fraser, 2005: 73). This would represent a situation where the education system is focused on assisting and valuing (or not) students and reveal a commitment to the goal of social justice.

Novelli, Cordozo and Smith (2017: 17) note that the framework helps understand the complex social sectors within education that inform how to achieve change in society, and the role of the state in ensuring that the fundamental human rights of students are protected.

For South Africa, the framework offers insight into whether historical inequalities, that continue to exist in the current reality, are recognised, and how it is being addressed. The first R of redistribution provides insight into the 'remedies' provided to address the unequal distribution of resources and the inequitable distribution of opportunities. The second R of recognition offers insight into how injustices tied to status inequalities are addressed and participation introduced. The third R of representation provides insight into the transformative policies that lead to the equal participation of students (Novelli et al., 2017: 34). The way structures are set up around the political and economic environments of education provision creates the constraints and the opportunities for students to navigate their access, their ability to operate within institutions, and the ways they are treated within those institutions.

A key concern for education policy makers worldwide, as captured in UNESCO data, is that the youth population (ages 15-24) is expected to reach 1,3 billion by the 2020s, with an expected growth of 7% by 2030 (Selenica & Novelli, 2021; United Nation: World Youth Report, 2020). Their concern is whether modern states can continue to provide education for

this rapidly growing youth population and how they would organise education in ways that are 'efficient' and financially sustainable within the neoliberal imagination.

For South Africa, Sayed and Badroodien (2016) note that the majority of student populations live on the periphery of society, in need of both recognition and protection, and suffer the worst consequences of 21st century neoliberal reform. Struggling with access to sustainable livelihoods, the needs and activities of these students in South Africa are deeply political, which makes them even more central to debates on the kinds of education provision that is on offer. This becomes especially apparent in the *National Youth Policy for 2020-2030*, a cross-sectoral policy aimed at youth development which hopes to facilitate 'positive development' to help youth realise their potential. For young people in South Africa, their precarious situations impact not only on their personal identity formation processes but also how student sense of belonging in society is nurtured (Habib & Ward, 2019: 4-7).

Student Identity and the impact of translocal spatial conditions on access to education

In the above regard, it is notable that schooling provision in South Africa differs vastly across race and class lines. A combination of these distinctions provides quite varied learning experiences for different students. And as they set about navigating their different spaces, students need to negotiate between who they are and what their news spaces require. Fataar (2015: 15) suggests that students negotiate more than just geographical space, but also their individual 'translocal cultural citizenship' and personal mobilities. Fataar (2015) introduces the concept of 'translocality' as a mechanism to understand the movement between schooling and the everyday lives of students, and the subsequent strategies they adopt. Fataar (2015: 102-103) notes that:

> '…translocal movement and adaption describe the trajectory of those young kids who wake up 'culturally black in an impoverished city space and move daily through the city landscape to enter the culturally dissonant spaces of their new schools.'

Using the work of Fataar on translocality ('youth in motion'), better sense-making is possible about the dissonant spaces South African youth need to navigate. Translocality as a concept helps understand the blurred boundaries between public education and private education provision in material ways. But it also extends beyond geographical relocation to imagined relocations of alternative future pathways.

South African youth navigate schooling experiences daily. Fataar (2011: 88) refers to these experiences as 'reworked cultural terrains' that are inevitably inserted onto global political

imaginaries. Fataar (2011: 88) notes that young people experience education in such bifurcated ways that the imprints thereof shape how they as students think about the type of education provision that they access, and the iterations of their identities that they apply in their designated spaces.

Fataar's concept of 'translocality' helps to track elements of student spatial subjectivities as they engage and make decisions around their access to philanthrophic scholarships. As such, 'translocality' and 'spatial subjectivity' offers insights into how students 'become' and 'unbecome' when engaging with their everyday social worlds. The concepts also offer ways by which the movement of young people between public and private education spaces, and the complex conceptual processes they employ to navigate these spaces, can be reconsidered (Fataar, 2011: 14).

The work of Crain Soudien then provides further comprehension into the ways South African young people grapple with their personal identities within public and private spaces. One of Soudien's (2001) key contributions and analysis is the relationship between school and identity-making and how young people cope within different contexts. Soudien (2001) utilises the concept of '*intersecting encounters'* to engage with the different discourses that students engage in, as they make sense of themselves in relation to their contexts. He notes that students adopt very particular identity-making/breaking processes within integrated schooling spaces, especially on a landscape consisting of oppositional worlds.

Soudien (2001) notes that students often adopt positions of '*in-between' people'*, taking ambiguous positions on discourses of the self that surround and engage them. He observes that this immersion is more than just about student sense-making of the school environment but also of how globalisation and modernisation is subtly inserted and embedded into schooling environments and consequently within their youth identities (Soudien, 2011: 1).

Young people grapple with the complexity of modernity that require skills that are essential for them to be socially literate as well as competent in the world of work (Soudien, 2002: 444), and at the same time they are always trying to find new ways of being South African (Soudien, 2011: 9). Soudien (2001: 319) observes that young people often embody oppositional and dominant discourses and in so doing develop '*identity conundrums'*. For those that traverse the boundaries of public and private spaces especially, their usurpation of ambiguous identities in the spaces they move through produces different kinds of '*embodiment and identity contestation*' (Soudien, 2001: 318). Building on the idea that student choices are influenced by

the incongruent messages they receive in different institutional and social spaces, while engaging with both contradictory and similar thinking within public and private education institutions, it is not surprising that student formative identities ecountered in the dissertation are undefined and unsettled (Soudien & Botsis, 2011: 91).

The value of using Soudien's various concepts across his writing (2001, 2007, 2011, 2015) lies in understanding how South African youth carry identities shaped by their apartheid past (in the form of their parents and their material conditions) whilst working against these to form and make sense of their own modern self. Their identity '*becomings and unbecomings'* within their material worlds may often be incoherent and discontinuous (Soudien, 2007: 96), but it reflects real time educational experiences and decisions that often step outside the goals and purposes of philanthropy (in the form of scholarships).

Conclusion

There is little doubt that the award of scholarships changes the discursive markers of the lives of beneficiaries. Chapter 5 offers some insight into the stories surrounding the award of scholarships on the lives of 22 recipients, and the multiple and different impacts they have on each of their lives.

The challenge is to understand the impacts and challenges on their lives in relation to both the global discursive influence, the national and institutional material realities, the nature and condition of the overall neoliberal project in South Africa, the status of education provision in local contexts, and the personal dynamics of different students as they try to make sense of the socio-political and economic conditions in relation to their family situations. The gap between the rhetorical and certainty takes on a particular level of materiality in the lives of each of the 22 scholarship recipients. On the one hand, the work of Nancy Fraser (2005) allows for a closer view of the kinds of pressures that the private sector brings through philanthropic incursions, and its influence, on public education realities. On the other hand, the work of Fataar (2015) and Soudien (2011) offers ways of understanding the complex decisions and choices that scholarship students make in the space between public and private provision, and how this changes the life trajectories of many of the South African marginalised youth that receive scholarships. These decisions and choices were complex and varied across the 22 research participants, and for that reason Chapter 5 utilises chosen keywords (like freedom, desperation, futures) by which to style and organise their individual stories.

Chapter 5: Student Navigations of Public Education Provision in South Africa

Introduction

The goal of chapter 5 is to show intersecting student experiences and life outcomes as a way of teasing out the influence of scholarships and public-private provision, and attendant tensions, on scholarship student lives. The aim is to see how philanthropy and the role of external role players change the way in which scholarship students schooled in the public sector tend to think and operationalise their opportunities.

The experiences shared by the noted 22 students were organised around three key areas, namely:

- The nature of philanthropic aid to the 22 students. The focus here was on seeing how the scholarships are perceived to have impacted on their lives and possible trajectories.
- The ways in which different recipients came to hear about and receive scholarships, and the ways in which this changed their approaches to education. The focus in this section was on how the existence and provision of scholarships within the public education system changed their outlooks and discourses of the sector.
- What scholarship recipients said about their experiences of philanthropy as members of public education. The focus was on whether students that historically had limited access to education and life opportunities, felt included (excluded) or connected (alienated) to education via their awards.

The stories of the 22 scholarship recipients were thematically grouped around the areas noted above as a way of addressing the dissertation's main research question, namely *What is the influence of philanthropy through scholarships on selected youth experiences of public education in South Africa?*

The Organisation that distributed the scholarships to the 22 students

As noted in previous chapters, the focus within the National Development Plan (NDP) on 'education, training and innovation' is on how to enhance economic growth and reduce inequality in South Africa. While there has been a significant increase in government spending on education in recent years to address this, in the current political moment the level of inequality is such that greater private participation in education is seen as imperative.

According to Draxler and Steiner-Khamsi (2018: 24) and Jooste and Scott (2012) in the international context, this reflects the growth and greater presence of private participation in

public education sectors worldwide, where liberal economic ideologies are dominant and where the narrative that the public education sector is inefficient is ever-present.

For the dissertation the non-profit organisation that utilises private funding to provide scholarships to the 22 research participants that participated in the study, are an example of private philanthropic participation in public education. The organisation is a registered South African philanthropic (non-profit) organisation that provides bursaries/scholarships to around 270 secondary school and tertiary students across the country. It pays for all direct academic costs and costs of attendance at designated high schools and higher education institutions. Many of the scholarship students are supported both at the secondary school level and then further supported at the higher education level.

Alongside the financial support provided, the organisation also offers academic and wellness support mechanisms and various development programmes to each of their 270 scholarship recipients, whether based in schools or universities. These support services are meant to empower students to academically perform to their full potential.

As noted in chapter 2, of the 270 possible participants in study 77 participants were identified based on their status as senior students or graduates, namely students that attended Higher Education institutions. And a sample of 25 was then chosen of students located in various universities across the country. This sample was reduced to 22 before interviews started. Eighteen of the 22 chosen participants were black (African, Coloured, Indian), and four were white. The group of 22 students attended nine universities across the country and originated from seven different provinces.

The goal of the philanthropic organisation is to assist students in different public education institutions in South Africa as part of a larger contribution to national economic growth enhancement and the reduction of overall inequalities. It is argued that this philanthropic contribution to public education offers a good example of the value of public-private partnerships in South Africa and the importance and usefulness of private participation in the lives of countless marginalised students located in the public education sector.

Crucially for the reader, both the narrative of the chapter and the stories of the 22 participants that serves as its basis, are not about students living in poverty in South Africa nor about how difficult their lives are. Rather, the narrative focuses on how philanthropy entered the lives of the different students and influenced the different pathways that they then followed. This

encompassed a variety of socio-political and personal decisions as they navigated the public-private partnership arena.

As noted at the end of chapter 2, only aspects of 18 of the student narratives are included in the findings chapter. These include elements of the stories of Grace (imagining), Athenkosi (desperation), Raaida (freedom), Kagiso (becoming), Lindiwe (angst), Kabelo (future), Stefan (easy), Mandla (access), Shantoleen (limits), Naa'irah (connection), Nokuthula (chosen), Lettie (pretending), La-Keshia (escape), Allistair (resentment), Nolwazi (privilege), Dian (acceptance), Letsatsi (transition), and Nicole (a paradox).

Different parts of their stories are provided at different points in the chapter to inform and shape the larger narrative of chapter 5, as these unfolded across the 18 stories.

Also noted in Chapter 2 is that each story was allocated a *single descriptor word* that seemed to lie at the centre of the story that was shared and then developed, and that tended to characterise the larger narrative of each of their stories. Throughout chapter 5, these words are consistently used to highlight some of the themes that are explored.

The contribution of scholarships to public education students in South Africa

The main contribution of scholarships is to offer funding for students to gain access to educational institutions that they would not normally get access to. Funding allows students to imagine a completely different future. And without funding, most students simply cannot study further. Even then, the cost of education is but one of the many stresses (insecurity, uncertainty, restraint, and perpetual anxiety) that students need to overcome in order to succeed at schooling.

Grace is an education student in the story of IMAGINING, studying at the University of the Free State. She hails originally from a small town called Luckhoff in Free State Province. As a child, she would cut out educational games from magazines as a way of teaching herself. As a high school student she wasn't a top achiever at school and was always led by the goal of 'just making progress'. Getting a scholarship meant that she could leave her hometown and travel to somewhere she would never otherwise have imagined:

> *My grandfather used to work for a farmer, so he transported us on Monday, and we would spend a week in my hometown where I meant to school– Luckhoff. Over weekends, I would spend my time on the farm where my grandfather was working. And on Mondays, the farmer would come and pick us up, including his other employees, and then on Fridays, he would come fetch us to bring us back. When I left to go to university*

the farmer's wife said: Grace, how wonderful – we never thought that a child sitting at the back of the bakkie for all those years would be on a flight one day…

Grace was recognised as a potential recipient for a scholarship during the two days a week that she spent working at a community work programme - sweeping streets and taking out the garbage. She did this to save money after she finished school to save for tertiary related costs. Hidden costs are seldom foreseen by students as they start new journeys at universities and in different spatial contexts.

Athenkosi, in the story of DESPERATION, hails originally from the Northern Cape. For much of his life, he and his family lived from hand-to-mouth. After applying to various universities, he was only admitted to the University of Fort Hare for a degree in Human Settlements, which he pursued with the assistance of a NSFAS bursary. Even with a NSFAS bursary, Athenkosi's family had to contribute financially in order for him to survive at Fort Hare. At the start of his second year at university, as he was about to take the bus back to Fort Hare, Athenkosi received an email from the University of the Western Cape (UWC) accepting him for a LLB. Growing up in the '*location*', he had always dreamed of studying Law and becoming the '*ultimate lawyer*' in the courtroom, so he impulsively took the risk of coming to Cape Town instead. At the time he thought that NSFAS would continue funding him and allow the switch to a new tertiary institution and a new degree. They didn't. Before he was able to secure a scholarship, he lived with the bare minimum and the fact that he did not have any book allowance, for example, meant that he had to take out the library books. Thus for the first three months at UWC, Athenkosi would sit in the library from early morning till the library closed and then take the last shuttle back to his accommodation. He hardly ate, but felt like he couldn't ask his family for assistance as this would put extra pressure on them. He had also not told them that he had lost his NSFAS bursary when he moved. As Athenkosi exclaimed, the '*hustle was tiring, yoh'*. It often got to a point where he wondered if it was even worth living. He applied for the scholarship after being told by other students about it. When he secured the scholarship, it pulled him out of a deep hole. The funding gave him travel fees, book allowances, and food money. But for Athenkosi, it was also about '*someone having my financial back – giving me the assurance that they will do well by me'.*

Raaida, in the story of FREEDOM, was raised in a mixed-race, Muslim, and very conservative family. Initially from Durban, Raaida did not expect to ever leave Kwa-Zulu Natal (KZN), but being awarded a scholarship in Grade 11 opened up new opportunities for her. Until then she had not even anticipated attending university, let alone moving out of KZN in order to do so.

When she was accepted for study at University of Cape Town (UCT), she even had to do a PowerPoint presentation to her mother to convince her to allow her to take up the position as leaving home normally only came with marriage. This is what happened to her sister who applied at the University of Kwa-Zulu Natal (UKZN) and received a NSFAS bursary but then got married and moved to Johannesburg. According to Raaida, her sister's story was her cautionary tale about '*what her life could potentially look like'*. In telling her story, Raaida was careful not to caricature her experience as the '*suffocated Muslim girl*' but rather to focus on how her move away from home and her local surroundings activated her 'voice'. She felt that through mechanisms like NSFAS, access would not have been an issue, although she acknowledged that her experiences might have varied. Ultimately, the award of the scholarship protected her from some difficult choices and allowed her to 'both choose herself and her family'.

In the story of BECOMING, Kagiso from the Alexander township of Gauteng completed all his schooling in the 'township' before becoming a first-generation student at the University of Witwatersrand (Wits), studying Industrial Engineering. Kagiso spoke about the pressure to maintain a specific percentage throughout his studies and that coming from a township school, always made him worry that '*if I mess this up, I am going back'*. It was a thought that hounded him throughout his years of study. So much so that when Kagiso failed his second year at varsity, he thought that '*he had blown it'*. According to Kagiso, he was lucky in having secured a scholarship when he started his degree, as the staff with the non-profit organisation helped him change his degree in year two, and again supported him in his final year when he failed two subjects. He recalled after one particularly difficult exam that he failed, that he asked his scholarship representative '*are you going to tell me that I need to find a new scholarship? Am I out?*' For Kagiso, the support provided by the non-profit organisation was thus as invaluable as the funding that they provided, as they '*helped me out with so many struggles and was someone I could talk to when I felt alone*'.

Unlike Kagiso, Raaida spoke about her disappointment when she got to UCT and realised that she was all alone and that there was no one to support her. For her, she tried to address her limitations as best possible and not allow the unknown to overwhelm her. Lindiwe, in the story of ANGST, concurred about her experience at a University of Technology, where '*being a hard worker didn't matter because if you didn't have the time and didn't have the ability to adjust, it wouldn't matter'*. For both of them, the lack of support from universities was

paralysing and undermined their experience of education. They noted that '*not knowing and not knowing what you didn't know, was really scary*'.

Not knowing what universities expected of them, or what every university student needed to know, Kabelo, in the story of the FUTURE, told about his struggles as a medical student at the University of Witwatersrand, feeling overwhelmed and always 'lost'. Kabelo grew up in Tzaneen in northern South Africa where he thought that '*he knew stuff*' until he got to Wits and realised how little he knew and how many learning opportunities he had missed until then. Kabelo spoke about how he constantly 'hid' after realising what he had missed, knowing that he couldn't catch-up or do all the things that he would have wanted to do. Kabelo spoke about the 'fear' and 'dread' that always followed him.

Wanting to hide, not feeling knowledgeable enough, and feeling that they didn't serve, were views that were not exclusive to Kabelo. In almost all of the recipient stories, there was a sense of students wanting something better for the future, yet not quite believing this could happen. As Lindiwe described, it was something that didn't need explaining, like asking '*what does a broken life look like? – We all just knew'*.

However, as in his first year of having the scholarship and being confused and shy about being asked by so many people to speak about himself and also to do keynote addresses, Kabelo retorted '*Can this really happen to someone like me?*'. Funding from scholarships, according to many of the students, was more than about money but also the connections that came with the scholarships; a space to meet people and to learn from them, to develop new social circles and attitudes, to develop 'new friendships and learn about alternative dreams'.

Stefan spoke about the sense of belonging that good scholarship programmes often create and that become spaces where people get together and speak about different issues, but not in polarising ways. In his story of EASY, Stefan told about his experiences as an academically-gifted student that wanted more from his educational experiences. For him, the scholarship served as a thought catalyst and a space for critical engagement. It was a space where he met different students and '*through them getting to know more about himself'*. Going to university, Stefan noted, he wanted to be '*more than the smart kid or the one that always came first in his class'*.

Returning to the 'value' of scholarships, some students noted that scholarships often also freed up their parents and families from the responsibility of supporting them. Kabelo and Raaida described this as 'generational wealth', where their scholarships offered opportunity and

'freedom' for their families as well, in being to spend their hard-earned money on themselves or freed of the '*burden that getting access to universities brought'*.

As some concluding comments on the initial access to the philanthropic enterprise within public education, where scholarships extend beyond funding and include other forms of affective value and support, Mandla observed that scholarships that were divorced from the actual realities of student lives, ultimately were wasted investments. In the story of ACCESS, Mandla noted that scholarships invariably did not confront actual social challenges, and that their role needed to be redefined if they were to genuinely contribute to the betterment of recipients. Mandla noted that while scholarships gave him the financial opportunity to attend and remain at university, it could not remedy fundamental dilemmas within education and in society, and that '*good social progress will only be possible through some form of working together with the government, and where all sides of civil society came together*'.

Within the student stories captured above, the scholarships provided the students with opportunities, challenges, and key dilemmas that, as they worked through them, certainly caused them to approach their access to education and their futures in quite different ways. Though limited as insights into their overall stories, the inserts suggest a complex grappling with the reality of their overall lives, made better (or worse) by their successful access to scholarship funding.

How do different recipients come to hear about and receive the scholarship?

How do students in public schools across South Africa find out about scholarships provided by philanthropic organisations? How do students in quite different rural and urban contexts, with significantly different socio-economic environments and quite different geospatial dynamics, go about engaging with the challenges of 'translocation', both inside and outside the provinces in which they were schooled?

Of the 22 scholarship recipients in the study, 12 students were studying in provinces different from their home province, six were originally from more rural contexts or towns, nine lived in informal settlements or township areas, and nine students grew up in some of the poorer provinces of South Africa - far away from big urban centres – including Limpopo, Mpumalanga, Northern Cape and Free State. It goes without saying that different provinces in South Africa have quite different socio-economic conditions, with different urban and rural percentages and ratios, and that this makes access to scholarships and funding substantially varied.

Shantoleen, in the story of LIMITS, was identified by her Grade 12 teacher, along with a few other students, as possible applicants from her school for a scholarship at university. Her teacher gave her the forms to fill out and submit. She told her mother about the application and even though her mother was very encouraging, she did little else other than remind Shantoleen that she needed to perform well in her exams. Shantoleen is currently a final year teacher education student at North-West University. Born and bred in the small town of Victoria West in the Northern Cape she attended an informal primary school and then a public high school in the town. There were only two schools in Victoria-West, a combined school from grade 1-12 and a public high school. Shantoleen walked to school every day; a walk of about half an hour. For female students like her in the town, completing school and matriculating meant little, as 'op die dorp' (remaining behind in town) was the expected reality of all her peers. Shantoleen regarded the award of her scholarship to attend North-West University as a lifetime opportunity to break the cycle and belief that grade 12 was her ceiling of learning. For Shantoleen living in Victoria West until then meant having little choices – not in the school she attended, nor the life that she was expected to lead. The scholarship offered her an alternative '*to a life of nothingness'*.

Le-Keshia from Friemersheim, a small remote and isolated town in the Western Cape, told a similar story. In her story of ESCAPE she recounted her daily 20 minute bus drive to school in a neighbouring town, where she attended the only public high school in the region. For students like Le-Keshia, the only envisaged careers were teaching and nursing, with career fairs at the high school only ever having Cape Peninsula University of Technology, Nelson Mandela University, and South Cape College offer presentations. Until she eventually left Friemersheim she didn't even know the there was a University of Stellenbosch or a University of Cape Town.

By her own admission, had she not been a teacher's pet, Le-Keshia would not have known about the scholarship. She explained that on a given day at school she was sitting on a bench when there was an announcement, '*if anyone wants a scholarship application form, then come fetch it at the principal's office'.* That was literally how she had applied. At her school most students did not attend school after examinations were completed, but Le-Keshia always attended as she didn't want to be at home. She would go to help teachers count marks just to keep busy. As she recounted, '*anything to get away, I just wanted to get away from here* (ek wil wegkom, hier wil ek net wegkom)'. Le-Keshia submitted her application for a scholarship on deadline day at the very last moment. Her teacher assisted her to apply, with her being notified a few weeks later that she was invited to attend the interview round of the application

process. Le-Keshia recollected that her application and award of the scholarship '*was a complete fluke'* and that '*things like that don't happen to people like me*'. Le-Keshia is in her final year of her BCom Financial Planning degree at the University of Stellenbosch.

In the story of IMAGINING Grace originally did not have funding to attend university. She didn't receive the required marks in Grade 12 to get access to a university, but her grandfather's employer was convinced by her potential and offered to pay for her to redo some subjects at UNISA to improve her marks. Once at UNISA however, she was advised that she could get access to an education degree programme and didn't have to redo her matriculation year for better marks. This is how she came to start her higher education journey. And because her grandfather's employer was paying for her studies, Grace committed to work hard to show that she wasn't wasting any money. Being from a small, isolated town meant that Grace struggled with a variety of structural challenges submitting all her assignments on time. Even though she was performing well, she felt that the barriers to her education was catching up to her, and thus had a conversation with her grandfather's employer about whether there is any way she could study fulltime at a contact university. The daughter of the farm-owner helped her apply at the University of the Free State (UFS), and in her second year (at UNISA) she was offered a transfer to UFS, along with a NSFAS bursary. In that first year at UFS the farm-owner's daughter sent her application forms for the scholarship; which Grace was subsequently awarded.

For Shantoleen, Le-Keshia, and Grace, there were a few common elements across their stories of (limits), (escape) and (imagining) that informed the process of them applying for scholarships, namely:

- The support and encouragement of teachers in their rural schools in making students aware of the scholarships as well as then navigating the process of applying for them;
- The level of discomfort amongst each of them with their living conditions and their concern about the general disinterest amongst their peers in further studies;
- All of them only getting access to possible funding just before (or after) they left high school;
- Their rural contexts providing very limited choices to them both in the schools they attended as well as the funding options that were available to pay for schooling;
- Getting access to further studies was not dependent on their performance at high school.

A similar narrative was also evident in Kabelo's story of the FUTURE where he was born and raised in rural Tzaneen, close to the northern border of South Africa, and had to struggle through enormous hardship and trauma in his provincial 'translocation' from rural Limpopo to urban Johannesburg in Gauteng. Having been born to a young mother who left to Johannesburg in search of work just after he was born, Kabelo was raised in Tzaneen until Grade 1 at which time he was sent to re-join his mother - for schooling purposes. When his mother passed away during his high school years, Kabelo remained with family in Johannesburg because they wanted him to have a better possibility of succeeding at school. This was so because before his mother died she had managed to secure a bursary for Kabelo to attend a fee-paying school in Edenvale. He then later became dislocated again when his uncle lost his job and Kabelo had to find alternative living quarters in Alexandra as a way of staying at the school where his fees were being paid. Kabelo eventually went to Wits University to study medicine.

In contrast to the above stories, Naa'irah and Nokuthula in the stories of CONNECTION and CHOSEN received access to scholarships early in their high school careers. Both were awarded scholarships based on their school performance and because their families actively searched for funding. For Naa'irah, in her story of CONNECTION, she grew up in an area previously defined as a 'coloured' township in Cape Town and attended primary school very close by. Her mother was a divorced single parent and knew she couldn't afford high school fees, and thus searched for bursaries from as early as Naa'irah's primary school years. From shared knowledge about scholarships from two cousins that worked at the Allan Gray Foundation, her mother applied at a variety of foundations, which all required Naa'irah to apply and be accepted at a preferred high school on their different lists. While Naa'irah did not get the Allan Gray scholarship that her mother applied for, the high school that she got accepted at advised her to apply at a few other foundations, two of which were awarded to her to allow her to continue her high school studies, as well as her physiotherapy studies at the University of Stellenbosch.

For Nokuthula, in her story of CHOSEN, she spoke about her childhood in a Johannesburg township where she attended both primary school and high school. Nokuthula was in the top-performing cohort of her high school and thus applied to different scholarship programmes. At first all of her applications were unsuccessful, to the extent that she wondered as she applied at others, '*what if they don't want me like the other scholarships didn't*'. When she eventually secured a scholarship for herself, she wondered '*am I deserving of this, or is this just luck after trying again and again*?'

In the story of ANGST, Lindiwe also recounted how desperation and desire to get a scholarship made her feel vulnerable and exposed. For her, the stigma attached to attending the same school that all other girls from her area attended – '*where anyone else could attend'* – was a stifling thought. The girls from her school were called '*Boroughs Girls'*, where '*everyone got pregnant in grade 9 and 10'*. For Lindiwe, a scholarship was her 'way out of poverty' and not living the same lives as her granny and her mother. She noted that she searched and searched for funding opportunities and had mixed feelings when she received the scholarship: '*vulnerable but relieved'*, '*worried but empowered*', and '*knowing that this was the start of new struggles, not the end of my troubles*'.

These feelings of 'vulnerability and loss' were not only bound to students studying in public institutions or predominantly rural and poor environments. Lettie, in the story of PRETEND, grew up in Bushbuckridge, Mpumalanga where her only choice of schooling was between a small rural school and an expensive private school. She was fortunate that she could perform well academically, and thus got accepted to the private school with a bursary attached. Her problem however was that she needed to move to the school hostel in order to attend school, and private school bursaries did not cover boarding. This meant that she had to either forego her place at the school or find further funding. She describes it as '*pure good fortune'* that she was able to attain a scholarship to pay for her boarding and other costs:

> *In grade 9 I was called to the Headmistress office, during class time. Everyone was like: Wow, Lettie, what did you do? I was so scared. She wanted to know if I would be interested in applying for a scholarship or bursary for my boarding. Of course I was interested.*

As with Lindiwe and Lettie, the fear of attending the school that everyone expected them to attend, for Allistair (in the story of RESENTMENT) securing funding to pay for a different school to the one he attended, was imperative. Growing up in Durban, Kwa-Zulu Natal, he was accepted at a school in Grade 7 but told that he needed to secure funding first before he could attend. It was at a private school and he was told that '*you have the marks and you are good at sport, which is what we want, but now we must talk finances'*. It was something that he was quite used to as he carried around the burden of debt from a young age, where his mother owed money to the primary school he attended and was constantly called and reminded about her debt. Fortunately for Allistair he was eventually accepted at a prominent boys school in Durban, with a bursary attached. However, upon entry, he was told that he would need to get another outside bursary if he was to continue at the school in grade 9. The fear of being kicked

out of the boys school hounded him all of that year, until his mother secured him a scholarship to continue his studies at the school.

These above and other stories are reminders about how the costs attached to public and private education played out in the lives of the various students that participated in the study, and the intense feelings of vulnerability, desire, desperation, and resentment that it engendered on many occasions. While securing scholarships normally represent opportunities of hope and possibility, the fear of failure and returning to '*previous lives'* was deeply distressful to all of the research participants - alongside the possible thought '*of a different future'*. It was found in the study that the act of constantly having to find out about funding opportunities, and knowing that without funding their futures would probably be '*so much bleaker'*, held 'hostage' the futures of all of the various research participants.

How do scholarship recipients describe their experience of philanthropy as members of public education?

While the first two sections of Chapter 5 addressed access to funding that assisted students' educational journeys along with how they came to find out about scholarship funding and their different opportunities, this section addresses the influence that scholarships potentially have on how the students in the study conceptualised and articulated their views of public education.

Across the 18 stories that served as the basis of the chapter, the students offered some quite challenging insights about public education and the struggles of different students to succeed and overcome their individual conditions once they secured scholarships. These included views that suggested that:

- Individual struggles to survive in the townships were worth the effort if it led to their eventual success;
- Getting scholarships to higher-fee paying schools required students to participate in activities that they needed to struggle through if they wanted 'to connect to real lives';
- Distance from school signified upward mobility, especially given that ex-Model C schools and private schools were always further away;
- Different gradations of schools in South Africa reflected for students the quality of learning attached to the different levels;
- Access to rich private Afrikaans-speaking schools and being able to communicate in Afrikaans offered different and 'superior' levels of values and skills; and

- When students showed that they were better, smarter, stronger, and industrious in higher-fee paying schools and universities this reflected their commitment to the idea that hard work, not collegial respect and partnerships, paid dividends.

These insights have quite troubling implications for public education provision in South Africa and what the 18 students thought influenced their futures in the sector. In the sections below, specific student stories are used to reflect various insights that were expressed above.

In the story of FUTURE, Kabelo spoke about how he was constantly reminded that he would only succeed through quality education, hard work, and great sacrifice. This is '*what would save him'* from the harshness of the public education system, and that losing access to funded contributions would always be disastrous for his future life. For Kabelo '*quality education was the only way he would make it in life*'. He recounted how he was always reminded when watching others do manual labour, that something else was expected of him.

In the story of FREEDOM, Raaida spoke about how integration at a higher-fee paying school was exhausting and '*came at a cost'*. She recounted how 'becoming a legitimate member' of her new school required her to partake in extra-mural activities every day. This was not possible as her parents could not afford fetching their two children at different schools (one at an ex-model C school and the other at a 'normal' school) at different times. Raaida explained that after her father became ill when she was in grade 9 she '*tapped out and stopped trying to integrate*'. While still performing well academically, she felt disconnected from her schooling space, noting that '*it was one thing receiving all those blazer colours, it was quite another thing not being able to afford stitching the badges onto her broken blazer'*.

For Raaida this disconnect with more privileged education institutions continued into university. This included her having to move provinces in order to gain access to a new beginning and 'voice' in Cape Town. Raaida described her experience at UCT as a variety of ebbs and flows. Sometimes she felt like she 'owned the space' while on other occasions she felt completely alienated and helpless, in awe of the '*knowledge and skills of others around her*'. Her experience of education was also one of familial alienation where she had to give up on her family respecting her achievements, or even attending her graduations because they did not value her educational journey in the same way that she did.

Raaida's story was similar to that of Nolwazi's in the story of PRIVILEGE. Nolwazi recalled how growing up her mother would need to work really hard to ensure that she attended an ex-Model C, 'predominantly white' primary school. For Nolwazi, being at the school was about

getting '*access to quality education'*. But because of the difficulties this placed on her mother to pay school fees Nolwazi would connect to the families of her white school friends, who would often 'donate things for her home or help with school expenses'. Nolwazi noted that adapting and assimilating into the school helped '*ease things financially and gave her opportunities that she had never had before*'. This changed substantially when she secured a scholarship to attend high school at the Oprah Winfrey Leadership Academy for Girls, which took a 'huge load off my mother's shoulders' and for the first time in my life 'she didn't need to feel like an outsider, where *'I was just a kid like the other students but where they had both parents who could easily sponsor them or buy them things'.*

In many of the stories the living distance from school also tended to be associated with upward mobility, especially given that ex-Model C schools and private schools were always further away from the local contexts in which they grew up. Many spoke about scholarships as almost contributing to the separation from family life. In the story of ANGST, Lindiwe bemoaned both her experiences of attending a school inside and outside of her immediate area. Lindiwe initially attended primary and high school close to home. In her primary school, she mentions that '*there were only two coloured students in her school'* and that in high school she *'found the rest of the coloured community'*. Lindiwe's mother then applied to Durban Girls High, but Lindiwe was not accepted because she lived outside of the district, and also because her single mother could not afford the school fees. In grade 9, however, Lindiwe reapplied and was accepted at Durban Girls High mostly because they moved house in order to qualify for access- '*my mother was really determined to give us a good education*'. When applying her mother also applied for a full subsidy from the school. Lindiwe recounted that the education at Durban Girls High was '*just different'* and that '*teachers spent more time teaching and had a very different approach to schoolwork'*. At her previous schools, Lindiwe recalled, classes simply '*didn't do any work because the perception of education and its opportunities were not understood'*. In her next grade her guidance counsellor called her in one day and suggested that she apply for the scholarship, which she was subsequently awarded. But what made her uncomfortable on that first day was that the counsellor knew that '*she needed a scholarship'* and the '*stigma that this attached to her'.*

In the story of ACCESS Mandla observed that there were key distinctions between ex-model C and township schools. He noted that to attend the former '*you needed money'*. Mandla also spoke about the difference between schools in different provinces, '*there is a hierarchy in education with rural at the bottom, then township schools, then suburban schools, and then the*

expensive ones. Urban was always on top'. For Mandla this also translated into the quality of education '*available at the different rungs'*. In recounting his own story he spoke about how he grew up in Limpopo and attended primary school there, and then moved to Johannesburg to start high school. He completed his matriculation year at a township school in Johannesburg. Mandla described his move into a township school as slightly better than Limpopo because the school taught in English compared to his rural school where he was taught in *Sepedi*. For Mandla the schooling of suburban schools was of '*better quality, even in the township areas'*, but that the township schools were '*sub-standard*, *with substandard teaching'* – '*a lot of work was self-directed, and one had to go the extra mile by yourself*'.

Mandla applied for (and received) a scholarship when he started university. His township school in Gauteng lay on the outskirts of Brakpan and was '*very, very far*' from home – '*stuck in a little coloured community'* and '*besieged by social evils like alcohol, drug abuse and crime*'. Mandla observed that the scholarship took him away from 'low-quintile areas' to '*better quality education ones'*.

For many of the students the shift in spatial geographies and social class environments often went beyond the school environments and the resources of the education institutions tied to their scholarship funding. Dian, in the story of ACCEPTANCE, originally went to an Afrikaans primary school, Jan Cilliers, in Gauteng where he initially struggled to adapt. Ironically, however, when he was accepted onto the scholarship in grade 7, he was offered the opportunity to switch the language code of the high school he chose to attend– '*that opened a lot of possibilities in terms of which high school to go to, and which one would really benefit my career*'. Dian chose to attend an Afrikaans private school in the Johannesburg area. '*Help Mekaar was a strong academic school close to Johannesburg CBD and followed and IEB curriculum'*.

Dian noted that what stood out for him at the Afrikaans-speaking school was that '*teachers made sure the students understand the work, and most students were focussed on getting to tertiary*'. For Dian, this was the difference '*between black and white schools'*. For Dian it was '*normal to attend extra classes or sports after school'* and '*to make sure you understand the work and get tested*'. Building relationships and asking questions wasn't something that he thought he could previously do, but when his received his scholarship '*they showed me what I could do and how I would perform if I did some of those things*'. Dian recounted that '*they taught me values and respect, and having a strong mindset*', and that '*as a black kid at those*

great schools, it was hard to keep up to their standards and remember what was essential'. For Dian public schools by their very nature did not '*really know what quality education was'*.

The perception that 'they had to change who they were' was a common refrain across many of the scholarship students, and the idea that there was a set of attributes that each of them had to acquire. In the story of TRANSITION, Letsatsi spoke about the '*importance of standing out and making people notice you'*. Letsatsi originally grew up in Velmas in Mpumalanga, and was raised by her grandparents who taught her that '*hard work and the ability to reach for opportunities was paramount*'. They reminded her that '*you are a public school where there are a lot of you. You don't get individual attention from teachers unless you come across as if you are smart.*' This value of hard work was '*how teachers recognised me and offered me different opportunities*'. Letsatsi recalled however that this, unfortunately, did not '*make her a lot of friends because the students treat you differently when they realise that you are smart and the teachers are nice to you'*.

Always feeling out of place at primary school in Velmas. Letsatsi felt that there had to be '*a better education elsewhere'*, which, when she received a scholarship, came '*in the form of a very exclusive high school for girls that required students to be from a specific income group with a minimum academic average'*. Letsatsi further noted that it was there that she realised that as much as '*one could get access to other public schools there were always slightly better schools out there than the one she attended'*. For Letsatsi, formulating the attributes to succeed at such schools was '*the most crucial learning curve'*.

In concluding the stories of the 18 scholarship students, the story of PARADOX captures perhaps the most urgent and challenging impact of funding on the perception of public education provision. Nicole was born in Swaziland and in South African descriptions had African parents. They moved to Mpumalanga early in her childhood, where she grew up in Piet Retief, Mpumalanga. Her parents worked on the farm of an Afrikaner family in Piet Retief.

When interviewed, Nicole described herself as a hybrid black, white-ish person. She spoke Afrikaans at home and was adopted by the white family on whose farm her biological parents worked. Her white family adopted her legally at the age of one or two. Nicole recalled that '*staying with her biological family just wasn't an option'*. This was because her biological parents came from a family with quite violent backgrounds, and '*I was always a lot safer with my now-parents'*. Nicole attended a good high school in Piet Retief, where there were resources and where she could participate in all sorts of extra-curricular activities. Going to a better

school afforded her the resources and options that she would not otherwise have had. It also gave her the opportunity to apply for and receive a scholarship to pay for her future development and progress. Nicole recalled that '*the pressure that came with the scholarship was enormous, and I learnt quickly that performing well academically was a necessary part of my identity*'. For Nicole performance at school was a 'transactional and financial activity' that students that came from disadvantaged or troubled backgrounds had to simply accept, and that getting a scholarship meant that she always needed to perform at a certain level. Nicole spoke about aspiration and fear as 'coming together' and that '*the journey that gets you to the top is never in one direction*'. Nicole noted that her life as a hybrid black, white-ish person was only possible through getting access to quality education; something that the scholarship arguably provided access to.

Conclusion

In this chapter it has been shown how intersecting life situations and student experiences produce a very specific kind of educational experience within South Africa's schooling system. Furthermore, it has been shown how the award of scholarships changes the narratives of each student's life, as well as how they view the public education system and its 'quality'.

For many of the students, poverty, struggle, and strong doses of trauma created life contexts where they each had to make life-determining decisions. At some points, scholarships served to offer different alternatives, in other cases scholarships held them 'hostage' to a particular orientation towards life and an arguably pre-determined set of attributes, values, and skills. As Grace noted in the interviews, '*my teacher told me once that an opportunity is like one hair on your head. If the wind blows, different hairs are blown away. To prevent opportunities from being swept away my teacher said that I must grab onto whatever I could'*.

From the stories above scholarships invariably held a focus on the 'care' of students and the profitability or sustainability of funding students that came from backgrounds of vulnerability and instability. Using vocabularies like the 'need for outputs', 'performance', and 'financial management', the private sector is able to provide their inputs within the public education sector. These vocabularies and approaches often influenced how key elements within the public sector were described or understood. A particular narrative that has damning implications for the public education system is that the modern state has completely 'abandoned the poor' and has started to rely on scholarships and other public-private partnerships to 'fund something that it no longer had the commitment or heart to fund'.

If anything, the rising inequality that has created the stage on which philanthropy is able to operate, has brought to the fore key questions *social justice* and change in South Africa, and the extent to which debates about the public-private conundrum has started to shape how historical understandings of space and identity is being reconfigured.

The following chapter considers some of the key lessons that emerge from Chapter 5 and what insights can be gained about increasing privatisation, debates on public education, and the arguably 'pervasive success of the neoliberal project' in South Africa. In the latter regard, Giroux (2003) cautions about how the various assaults on the public education system are part of a process whose end-goal is to turn education into 'a commodity'; a 'consumerised good'.

Chapter 6: Implications For Public Education and Scholarship Student Navigations – An Analysis

Introduction

That education is expected to always serve the development of democratic solidarities across communities, or be the centre of critical learning and thinking that generates the kinds of public values that are crucial for the development of society in general, is often sneered at within the neoliberal paradigm as naïve and ignoble pursuits (Bous & Farr, 2019). Economic growth is seen as the main required goal of education policy pursuits and key to the reduction of poverty and inequality that plagues communities worldwide. According to the neoliberal paradigm, education is the conduit that brings together and addresses social and political challenges, facilitate internationalization, and provide a global response to poverty alleviation, particularly at a time when schools are deteriorating worldwide and may not be capable of serving all students effectively (Saltman, 2012).

Giroux (2015: 50) asserts however that the purpose of education should always be to espouse cultures and values that allow students to think critically, embrace democracy in all forms and ways, and to intervene in the world in ways that expand the ideas of justice, equality, and peace. For Giroux (2015: 51) it is the attack and drive to change public education using market logic that has led to 'collapsing school infrastructures', 'uninterested students', 'unprepared teachers', 'general apathy', and 'feelings of complete hopelessness' within the general public education system.

Engaging the stories of scholarship students in chapter 5 allowed the political, economic, educational, and cultural influences that shape the ways in which young people make sense of their lives, to become more visible. Within a neoliberal system, their stories visibilised the interconnections between public education challenges, increasing privatisation, and how economic, cultural and political changes played out daily to affect their lives (Brady, 2014: 12).

Privatisation through scholarships, in the form of partnerships between public education and private sector bodies (Public-Private Partnerships), is currently presented as the 'saviour' and a 'crucial policy intervention and innovation' to existing educational challenges. It is presented as the 'innovative solution' that will salvage and protect the overall 'quality education project'. Neoliberal commentators suggest that in providing new educational opportunities and pathways for the marginalised, increased private sector involvement will serve those left

behind and most vulnerable in the current period, while simultaneously depoliticizing and rendering ideologically neutral a complex issue primarily focused on providing for the needs of the populace (as noted in Verger et al., 2020; Srivastava, 2016; Tarlau & Moeller, 2019: 6).

Within the neoliberal domain this thinking constitutes a 'double-move'. Firstly, the public-private discourse around the importance of PPPs has as a result been firmly and convincingly implanted in the minds of all educational stakeholders. Secondly, the view that the public education system is in a deep and irrevocable crisis is reinforced and its complete collapse deemed a *fait accompli*. These two moves are explored in the chapter in relation to student experiences of public education over a number of years. Their views offered (though in limited ways) an array of insights into a variety of important educational dilemmas.

In the rest of the chapter, the student perspectives provided in chapter 5 are analysed and interspersed in relation to concepts introduced in chapter 4 around 'inequality of educational opportunity'; how best to address 'institutional arrangements'; 'parities of participation' (Fraser, 2003); the impact of 'translocal participation' and translocality (Fataar, 2015); the 'intersecting encounters' that each student experiences as 'in-between people'; and the 'identity conundrums that they have to confront as they address new forms of 'embodiment and becoming' (Soudien, 2012).

The goal of the chapter is to overlap technologies of social justice (redistribution, representation, and recognition) with discourses of new philanthropy in a neoliberal public education system (Verger et al., 2020: 3), and to highlight some of the identity complexities that students faced within their everyday lived experiences of their scholarships in public education institutions (Fataar, 2015, Soudien, 2012).

The economic and political dimensions of public and private education provision

A variety of global drivers such as widespread economic challenges, changes in belief systems around individual choice and consumerism, pro-private reform policies, and international organisation involvement introduced through strategies such as Education For All (EFA), have led to and encouraged the incursion of the private sector and philanthropy into the provision of public services worldwide (Verger et al., 2017: 2). The neoliberal position in the 21st century is that a *redistribution* of responsibility for the provision of education will lead to greater access to a 'quality education product' for all students. This is because the current education system, they argue, is more class-based and market-driven than ever before, and that while older versions of provision may have opened up greater access it has not offered better quality

education. As such, partnerships between public institutions and private providers are touted as providing better opportunities for those previously invisibilised (the marginalised). Public-private partneships are the means by which to offer some students, that previously could not get access, a pathway to education provision that may 'presumably contribute' to sustainable livelihoods. The main logic on which this neoliberal argument is based is that public education institutions in the 21st century are characterised by poor governance, weak systems, and inefficient human resources, and that if they were better operated as 'public businesses' that they would be in a position to economically *redistribute* access to those students that could play a meaningful role in the economy in the future.

The neoliberal argument, notes Srivastava (2010: 524), is mobilised by four intersecting frames and logics, namely scarce resources, the need for efficiency in education, competition-choice-quality discourses, and particular understandings of social equity (Srivastava, 2010: 524).

Firstly, all of the scholarship students in the study for example spoke about the *scarcity of resources* in their initial 'township' or suburban schools before they received scholarships to attend better resourced schools. The students lamented their struggles with resources in public schools and the struggles that many of their siblings continued to endure at township schools. For them the possibility of different opportunities, new ways of engaging with school, and the possible new futures that moving to ex-model C schools afforded them, constituted a form of redistribution at the individual level. As one student, Kabelo, exhorted, '*can this really happen to someone like me'*.

Secondly, the consistent refrain that 'accepting scholarships' was inevitable and necessary because of poor governance, lack of management, and systemic inefficiency in the public education system underpinned an approach to public education that had the potential to completely undermine the sector. Le-Keshia reflected that her first thought when offered a scholarship was that '*she needed to get away'* from the poor conditions of township schools and mused that things probably wouldn't change in her school in her lifetime. Christie (2016: 442) bemoans the situation in public schools where almost 29 years after the collapse of apartheid policies, that 'township and rural schools generally have the same architecture and resource profiles that reflect their apartheid past'. Le-Keshia's words in Afrikaans were, '*hier moet ek wegkom*". Hers was a catchphrase suggested by most students, namely that the public education system seemed to be 'at the point of collapse'.

Thirdly, an important re-interpretation of redistribution within the neoliberal logic is that students needed to be 'worthy' of redistributed resources and need to properly compete to get access. They also needed to have 'better choices' about where they attend school, and the schooling that they accessed had to be of a particular quality that would give them access to further studies. Athenkosi noted that '*the hustle was tiring in trying to prove yourself. But it was necessary to get ahead and in the end worthwhile'.* The competition-choice-quality frame thus introduced discourses of individual agency that individuals could attain better quality education if there was a more open 'marketplace' from whence they could choose. This frame has the potential (and is meant) to discursively and materially alter the current public education landscape.

Fourth and lastly, the neoliberal narrative suggests that social equity is best achieved by zooming in on the needs of 'deserving' marginalised students, and awarding scholarships to those predominantly poor and struggling students (Srivastava, 2010: 525-527). For example, in South Africa since 1994 while the terms equality and equity are often used interchangeably within policy discourses, it has often been deemed necessary to adopt a 'differential distribution' approach in order to ensure that all students get 'equal levels of access' (Motala, 2019: 68-69). This 'policy idea' can be better achieved, neoliberal purists argue, through creating a better marketplace where all students have a choice to access, but within which the needs of the 'deserving' less fortunate are then prioritised for special attention. This would be based on historical inequalities and varying funding practices between provinces and schools under apartheid around funding that created unequal distribution and provisioning across South African schools.

Together the four mobilizing frames, according to Srivastava (2010), form the neoliberal rationale by which understandings of public education is being reorganised. Moving from a 'collapsing public education system' to an 'open marketplace' where 'anything is possible' is expected to reframe the ways in which students and other stakeholders think about *redistribution* amidst the need to create a 'better playing field'.

The neoliberal framework described above utilises a language of (so-called) redistribution that is quite different to what Nancy Fraser purports in her framework of social justice as briefly outlined in chapter 4. For Fraser (2005), the development of a socially-just society requires 'parity of participation' where everyone engages in social interactions as equal societal partners, and where redistribution is an important (economic) pillar that leads to the overall transformation of society. Fraser's approach to the economy is based on the needs of everyone

in society and addressing its levels of inequality in a holistic way. As Samoff (1996: 254) notes, "allowing a narrow approach or thinking to the *economy* to dominate will lead to the exclusion of the larger societal objectives for education".

In that regard, the stories of the scholarship students in chapter 5 also presented nuances within the narrative of scholarships and schooling that offer some alternative perspectives on the redistributive, representative, and recognition effects of scholarship funding on students. On the one hand, students in the new school spaces spoke about what redistribution meant for them (those that partook in the study) with regard to imagined new futures and real-life alternatives. On the other hand, students also reflected on struggles around participation, access, and personal limitations that were tied to the historical links of the South African context, and the social worlds that students identitied with; all of which were embedded within political and economic practices that played out at the different school levels.

Spatial redistribution

One of the big challenges for schools and students in South Africa is the historically varied nature of schooling provision based on the geographies of the previous apartheid education system. In everyday reality, the schooling system operates at national, provincial, district and local school levels in quite different ways.

At the national level of South Africa there are vast discrepancies between what education is on offer in public education institutions and independent education institutions. While there are low-fee or fully-funded independent schools, even these operate in quite different ways to public schools. There are also significant differences between what is offered in urban areas as opposed to rural areas. Urban and rural areas both have public and independent school systems that have high, low, and non-paying elements, with resources and infrastructures in the different schools (based on fees) quite different to each other. Within both the urban and rural sectors the differences between the various kinds of schools are quite significant. Also, the nine South African provinces each have varying levels of provisional capacity and organisation (Christie, 2011: 11; Jansen & Sayed, 2001), with public schools in Gauteng for example operating with different logics, approaches, and challenges compared to Kwa-Zulu Natal.

At the provincial level, depending on the province's level of urbanity or rurality and the historical make-up of their provincial schooling and its changes over time, there were also quite stark differences between the different sets of schools according to the comparisons made above. The same applies to district level schools where the 'performance' of the district is often

connected to the geographies of the system and the schools aligned to them. Within districts schools were often divided into township, suburban, high-fee paying schools and low-fee or non-fee paying schools. These discrepancies produce very different experiences for each and every school student across the South African educational landscape (Christie, 2016).

It meant that for a student like Kabelo, pursuing a 'new future' pathway from his first school in rural Tzaneen in Limpopo to the vast urban expanse of Johannesburg, translocating across a number of spaces from rural to urban, from 'poor province' to 'rich province', from rural school to township school, and from township school to ex-model C school, placed enormous pressure on him to adapt to new educational environments and to apply what he knew to a different context. The same applied to Raaida who left Kwa-Zulu Natal to do her post-school studies in Cape Town, and Athenkosi who left the Northern Cape to study at the University of Fort Hare in the Eastern Cape and then to UWC in the Western Cape. As they 'moved' each of them took along their perceptions of the 'quality' of education that they had been exposed to, and the schooling stereotypes that they had to commit to. This shaped how they went about 'making their choices' and informed the sacrifices they were prepared to make to attend education facilities in their new 'foreign' environments. Le-Keshia lamented that:

> *High school was the worst time of my life. I didn't have many friends. Other students didn't like me because they said I was a teacher's pet. If I wasn't I would now be sitting at home like everyone else in my town. It's not like I thought I was better that everyone else, it's just that I knew I didn't belong there. The teachers tried hard to educate us, because the education available in the town was difficult and the classrooms overcrowded. People tried hard, because most students were rude and teachers can only do so much.*

Fataar (2015: 10) refers to the situations of such students as the 'predicament of the marginalised'. He describes the different processes that the students encountered as 'institutional and individualised becomings' where students applied particular perceptions of themselves and where they came from to their new educational contexts in often 'unstable', 'incongruent' and 'uncertain' ways (Fataar, 2011: 90). Fataar (2015) notes that in many cases students struggled with 'displaced attendance', where they felt unwelcome, under threat, and often completely destabilised. Christie (2020: 202) notes in this regard that:

> Geography also often traps students of rural schools where they, once in urban areas, view mobility as the only route to a better school (and a better life).

Christie (2020) speaks about how geo-spatial differences not only limit choice but also limit what students think is possible about the options available. She reminds that physical distance for rural students for example needs to understood in all its complexities, whether it be the distance students travelled to attain different futures, or knowledge about prospective possibilities and how to access them, or the available resources within their communities to access different opportunities. Access to schooling and to further opportunities are spatially bound, with the eagerness or disinterest of different communities (teachers, parents and students) locked into what they 'viewed was possible' (Christie, 2020).

Student translocations and subsequent struggles, as noted above, thus call into question the extent and kind of *redistribution* that is possible in South Africa post-1994. This is based on the enormous spatial differences and inequities within which the many schools where students first attended, were located. National policies since 1994 have sought to address many of these inequities but have struggled to interrupt older levels of educational disadvantage and imbalances (Sayed & Ahmed, 2018). Rendering schools to look 'more like marketplaces' in the name of redistribution, where the neoliberal position further suggests that everyone needs to compete to get access, is unlikely to offer any kind of redress for marginalised students across the overall public education system, much less offer the majority of students the possibility of getting access to a quality education (elsewhere in the system) without having significant funds to pay for their schooling and further studies (Christie, 2011; 2016).

Economic redistribution

After 1994 in South Africa many students that were confined to particular geographical areas and schools under apartheid were given access to schools endowed with significant resources and characterised by more matured operational processes. Students however only got access to such schools by being able to pay high school fees. This introduced a new layer of social and economic inequality into the public education system (Christie, 2016; Motala, 2009). The introduction of the idea of 'choice' based on financial capacity in 1994 set in motion a series of rationales for including and excluding students from the upper strata of fee-paying public schools. Many parents thereafter went to great lengths to get access to these schools, including getting into debt (Soudien & Sayed, 2004: 109). The granting thereafter of scholarships or other kinds of awards to many marginalised students to attend such schools was initially intended to give *access* as a way of addressing this development, where poverty had prevented most marginalised students from getting entry to what was considered focused forms of learning. It is notable that through scholarships and different awards, many of the students (though

miniscule in terms of overall numbers of marginalised students) were also able to follow different education and life pathways.

Importantly, access to scholarships and a different set of public education institutions often came at a cost to many of the students. Firstly, for many scholarship students they faced an ambiguity where they had to acknowledge their separateness and subordinate status in order to use scholarships (and other funding) to try to move away from their previous status (Soudien, 2001: 315-316). Secondly, students could see how the scholarships and outside funding could materially change their lives, and thus had to ask themselves '*what they were prepared to do'* to make sure the scholarships continued (Fataar, 2011).

In the study, Kabelo for example reported going to enormous lengths to keep his access to his scholarship and the new school he attended, often at extraordinary costs to his health and overall well-being. The same applied to Raaida, Lindiwe, Mandla, Kagiso and Allistair who found that economic redistribution in a neoliberal system did not mean equitable distribution across other educational fronts. Lindiwe noted that '*getting a scholarship came at a price but I was desperate to get it. It was my way out, even though it made me feel exposed at all times'*. This is something that Soudien (2001: 316) refers to as 'divided selves' when operating within schools. Through accepting the scholarship and its intended redistributive function many students got the diabolical freedom to choose, namely *what to sacrifice* in order to get the opportunity to achieve something from their schooling and other educational journeys.

In terms of redistribution after apartheid, while the national system of education after 1994 sought to address a number of inequities historically bound up in the South African education system, it was the state's inability to dent levels of inequality within the schooling system that opened the door for other kinds of provision and funding sources to arguably try to do so (Christie, 2016).

Systemic and personal forms of representation

Within her framework of social justice Fraser (2005: 236) connects its political dimension (representation) to the idea of participation and 'voice'. For Fraser the ability to have the ability to make decisions is crucial to social justice objectives. In South Africa this played out in policy terms after 1994 in the ability of the electorate to get access to a number of institutional and policy processes that recognised their right to voice and to participate in the larger systems. In education, it translated into school governing bodies and other institutional structures being established that allowed parents, teachers, students, and other stakeholders to participate at the

local level in key decision making activities. The intention was to create forms of social belonging and acknowledgement that spoke to 'who counts as a member of society', 'who had the right to make decisions', 'who were included and excluded', 'whose voices were heard', and 'what to do when equal representation was not assured' (Fraser, 2005: 239-243).

The challenge after 1994 however, as Christie (2016: 443) notes, was that these forms of participation often increased inequalities in the system, where 'voices' in the different school spaces became visibly more unequal and where participation was informed by the resources local voices were able to command, both materially and symbolically. Based on the apartheid past and its geographies, across the overall education system institutional bodies were decidedly unequal, much less were they equal partners within the same local spaces and communities.

At the student level the greatest achievement with regard to participation was that for the first time in the history of South Africa it was anticipated after 1994 that all eligible students would get access to the education system (Christie, 2008). But the extent of participation after 1994 became primarily based on the ability to pay, with the right to education coming to mean "the right to attend the poorest funded and weakest performing schools in an unequal system" (Christie, 2016: 443). In that regard, the symbolic representation of a perceived new social order may have had an anticipated set of social practices attached to them, but they did not necessarily translate into actual practices and experiences in daily schooling life for most South African students.

Many students in the study noted this and asserted that being allowed to participate and attend schools that lay outside of their social imaginations meant everything to them. While they acknowledged the enormous angst that they felt in joining spaces that they felt 'alien' in, they felt that they managed their *participation* based on their senses of urgency to live beyond the boundaries that previously defined them, and to use participation to break 'free from the claustrophobia of the township' (Soudien, 1998: 26).

Ball (2007: 185) observes however that the establishment of a new 'canvas of social change' in the 21st century has introduced quite different sets of role-players with different levels of power to participate in the education system. Ball (2007) cautions that these are not institutional or technical adjustments to the overall landscape but is meant to politically reshape the meaning of participation and access in the education system, and the management and delivery of education services.

He observes that when placed against the larger canvas of neoliberal educational change, the meaning and experience of participation in education has been significantly altered by the incursion of privatisation discourses, changing what it means to be a student, who they are, and what they are expected to be and do (Ball, 2007: 187).

For the students in the study the hidden cost of participation within such a neoliberal space was tied to the efforts that they had to deploy to remain part of the system, where at all points they needed access to money and funding 'to pay for their belonging'. This had serious implications for how they approached the notion of a 'socially-just participative society', where they as students were encouraged to make personal choices and judgements that narrowed the ways in which they perceived themselves in relation to other students, to the education system they were part of, and to the political nature of the world outside. Kabelo described his experience of scholarship participation in the following way:

> *When you compare two children, one exposed to opportunities and the other not, the one who wasn't exposed isn't stupid but rather one that will learn with time after they overcome the struggles they are confronting. I was exposed to a scholarship and put in a situation that broadened my horizons and gave me opportunities that I did not anticipate. The scholarship gave me access and support to an unspoken curriculum that I couldn't imagine. It provided a platform and a new way of thinking about my future, in the support I received and in the people that I came to meet. It changed my view of education.*

The cultural dimensions of recognition and the different needs of students

Private contributions provide funding for student scholarships to give students access to (mostly) public education institutions that they would not normally get access to. Funding arguably recognises the need to support students and allow them to imagine a completely different future. Funders often argue that without funding most students that were part of the study simply would not have been able to attend the school they did, or pursue further studies. They argue that this constitutes a 'recognition' of students that is grounded in 'building a sense of self' for each of them and tied to the idea that the devaluing by dominant groups of marginalised or 'poor students' as a group creates an unnecessary 'distortion' for the students in their relation to other students (Blunden, 2005). According to neoliberal arguments, the envisaged denial of the 'status of a full partner in social interactions' can be remedied by

approaching students as individuals worthy of self-realisation and being included into the bigger group rather than as collectives just needing access.

While being awarded scholarships changed the pathways of the 22 scholarship recipients, and was for many their only pathway out of poverty, being 'recognised' as individuals meant two key things: an opportunity to achieve what they otherwise could not, and being regarded for the first time as 'worthy of support'. Le-Keshia noted that:

> *I often felt uncomfortable amongst other students feeling that I wasn't on the same level as everyone else. One day I was sitting alone on the steps and a facilitator asked me what was wrong. When I told her she said I must relax as there is potential in everyone that is there. She saw me, and the scholarship saw me, and that made me feel better about myself. It made me feel more worthy.*

Athenkosi added:

> *The scholarship provided me with a sense of belonging and made me feel appreciated. Victoria West was such a small town and all I knew was limited to my experience in the town. I never felt like I fitted in. Now I do.*

Within the larger educational system, this individualised approach to the rights of recognition *contradicted* the larger focus after 1994 in South Africa to confirm education as a basic human right for all students, along with the right to recognition of home language, religion and cultural backgrounds. It required the transformation of the education system after 1994 that in practice had entrenched a variety of privileges and biases, and led to the insertion of a "symbolic recognition of rights" within the overall public education system (Christie, 2016: 442). It was an attempt to embed what Fraser (2005) refers to as a Weberian-model of inclusion where students were recognised and valued in an institutionalised and programmatic way to address various forms of displacement. It was also about accomodating the full complexity of their social identities as an institutional and societal pursuit, with 'recognition' regarded as a question of social status, and being able to participate 'as a peer in social life' and full members of society (Fraser, 2005).

One of the most profound insights shared by scholarship students during the study was that at the best of times they often 'didn't feel that they were good enough'. A number of them also expressed deep fears of 'imposter syndrome' and the despair that came with being 'desperate to succeed'. This was the 'alternate reality' of being individually 'recognised' as scholarship students. For the students the changing neoliberal landscape of education in South Africa and

their status as scholarship students thus went beyond the material elements of funding and support to actually shape and reshape their experiences and thoughts about the overall public school system, where they were located within it, and their subsequent actions. Their participation in a space that lay on the boundaries of the public and the private, also required them as individuals to be always fluid, changeable, and adaptable- something that was not easily attainable for even the best of them.

Soudien (2001: 315) speaks about the above challenges as the different measures of ambiguity, ambivalence, loss, and feelings of betrayal that often confronted students that entered new and different educational spaces after 1994. They also constituted 'identity conundrums' that Fraser (2005) is keen to counteract in her social justice framework. She argues that the emphasis on individual identity and the need to display elements of authenticity or self-affirmation puts 'moral pressure' on individual members to conform to a given group culture or approach, and creates a situation where a simplified group-identity is imposed that denies or erases the complexity of different peoples lives (Fraser, 2005).

In many high fee-paying public schools scholarship students were expected to conform to the culture of the school if they wanted to fit in. They were also expected to take on and absorb into their thinking vocabularies of the market, commodification, privatisation, increasing corporatisation, and a language of depleted resources in other public schools (Giroux, 2015: xvi; Christie, 2020: 203). In holding scholarships within public schools they needed to change their outlooks and absorb the discourses dominant within the neoliberal system.

This dominance of how terms and concepts are understood within the sector is an intimate part of the neoliberal incursion of private provision in the public education system in the 21st century, to the extent where the discourses have even set about individualising and commodifying concepts of intended change like 'redistribution', 'representation', and 'recognition' to justify why private sector involvement is necessary within the public education system.

Concluding thoughts

The aim of chapter 6 was to overlay an engagement with the goals of social justice through student experiences of philanthropy, with that of student experiences of scholarships in a neoliberal public education context. The focus was on using the 3R (redistribution, representation, recognition) framework of Nancy Fraser to help analyse student reflections on their scholarship experiences and another identity struggles tied to their funded public

education journeys. The chapter also sought to insert some analytical contributions from Aslam Fataar (translocality and becoming) and Crain Soudien (identity conundrums, divided selves) to probe student personal reflections and their potential impact on social justice pursuits within the public education sector.

Using the 3R framework the chapter tries to show how these same terms that were being used to evaluate whether social justice was being pursued and adhered to, were also being used to justify the need for increased private sector involvement within the public education system. The chapter thus spliced the social justice debate with the neoliberal encroachment to highlight the key struggles at play.

While the chapter also started out searching for student inputs on public education it quickly became clear that debates about cultures and values about public life, democracy, and issues of justice, equality, and peace were furthest from the minds of students struggling to survive. As such, the approach taken was to visibilise how the daily individualisation of public education experiences and its struggles was recasting student approaches to public education.

A key insight that emerged from the analysis provided is that private sector involvement in public education, through scholarships, often may seem to offer 'salvation' to many students that would otherwise be confined to the constraints of their historical, geographical, and personal contexts. However, its involvement in the public education system itself was often neither innovative nor transformative, and seemed to be contributing to the further decline and corrosion of the public system by claiming that the current crisis was simply about 'good' provision and its content and quality.

Another important insight was the number of students that spoke about the various challenges tied to funding awards and the personal dilemmas this created for each of them. 'Not being good enough' and thinking of themselves as 'imposters' does not bode well for the creation of a society of common citizenship and equal status, nor a society where social solidarity is meant to lie at its core.

Perhaps the most worrisome insight was that each and every scholarship student conceded that they needed the award, that it was important to their futures, and that they would do what was needed to retain the scholarships. It spoke to an internalisation and socialisation of a language of survival and winning, where the 'battleground of the future of education' in South Africa was being played out in their everyday personal and complex lives. Student dispositions suggested that supporting a public education system that could no longer support or develop

them, was no longer possible in a neoliberal reality where they were merely consumers and their purpose was simply that of ‘surplus’ or ‘disposable’ labour.

Conclusion

Public education in the 21st century is at a point of significant rupture. This has much to do with the incursion or increasing participation of the private sector within public education institutions presently. It is also due to the reduction of state funding worldwide for public education and the challenges for government departments to carry the huge costs involved in maintaining educational systems. Modern state education systems have struggled to finance public schools and ensure their upkeep to the necessary standard, which has not been helped by operational discourses within education departments being preoccupied with 'austerity', 'funding models', 'downsizing', 'streamlining' and 'outcome returns'.

For South Africa, Executive Director of Amnesty International, South Africa, Shenilla Mohammed, noted in 2020 that "to comply with both its own constitutional and international human rights obligations with respect to education, major change is needed urgently". She observed:

> *South Africa has one of the most unequal school systems in the world. Children in the top 200 schools achieve more distinctions in mathematics than children in the next 6,600 schools combined. The playing field must be levelled. Also, children in the lowest income groups are also more likely to walk to school than those in the highest income group. In Kwa-Zulu Natal alone, where more learners walk to school than in any other province, more than 210,000 pupils walk for more than an hour each way, and 659,000 walk for between 30 minutes and an hour each way. When they do get to school, students are often being taught in overcrowded classes impacting on their ability to learn effectively. The repeated failure of government to address the issues is not only a question of accountability, it has consequences for the life chances of thousands of young people and the future of this country* (Amnesty International, 2020: 1).

As a public space, public education systems are therefore quite precarious environments. This is not helped by what US education activist, Jonathan Kozol, noted in the early 2000s as 'the onslaught of the private sector' that is keen on profiteering from the decline of current public education systems. Kozol referred to a prospectus for investors written by an investment group, Montgomery Securities, in 2012 that said:

> *The education industry represents, in our opinion, the final frontier of a number of sectors once under public control, that have either voluntarily opened or have "been forced" to open up to private enterprise. Indeed, they write, "the education industry*

> *represents the largest market opportunity" since health-care services were privatized during the 1970s. From the point of view of private profit, one of these analysts enthusiastically observes, "The K–12 market is the Big Enchilada"* (Jones, 2012)

Fundamental to such a process is to discredit the public education sector generally, and promote the idea that the free market will solve all current educational problems. This has happened in other sectors in more explicit ways since the 1980s (Jones, 2012). Spreen, Stark and Vally (2006: 2) use the term 'seduced' to describe increased private sector incursion on the essence of public education, where public schools increasingly use the language of choice and cost efficiencies to plan and strategise the futures of their student charges.

Noting the above is not to suggest that public education systems are not failing in their responsibilities to students across the world, nor that private sector input into public education is solely driven by the profit motive. Rather, both points highlight contestations tied to the reconfiguration of the modern state system in the 21st century and how this has impacted public education institutions. In this regard, Novelli (2016: 4) reminds that the educational agenda of the free-market system undoubtedly reproduces inequality but that it does so in 'complex and contradictory ways' with often contradictory outcomes.

Ultimately, what is stake at the heart of the above contestation are the students themselves and the protection of the well-being of the majority of students schooled in public education systems, in South Africa and elsewhere. What model best addresses student needs in South Africa? How can their dire situations be addressed in not only a struggling educational space but also a failing economic system?

In the contemporary moment South African policy makers seem to be increasingly drawn to public-private partnerships as a way of getting more funding into the public schooling system and alleviating some of the public funding challenges tied to it. In allowing non-state (philanthropic) role-players to have a greater influence in the current system there is every prospect that the new initiatives will become bigger enterprises with more international ambitions, and change understandings of public education for all.

Notwithstanding its long history of collaboration with education in South Africa, where philanthropy has contributed in important ways to alternative forms of schooling, adult education development, night schools, and resistance to apartheid, there is a real danger that current iterations of philanthropy and non-state involvement in a 'commodified marketplace' could serve as the conduit for bigger private sector machinations to thrive and profit at the costs

of students within the public education system. There should be serious concerns about the majority of students in the public education system becoming 'disposable' (Giroux, 2012) and their needs ignored in the arrangements that are currently unfolding.

Perhaps more concerning from the stories of the 22 students that agreed to be interviewed in the study, and provide backstories for their experiences as scholarship recipients, are the vocabularies and languages that they used to articulate their life encounters. Reflecting on their challenges, their increased possibilities, and their new imagined futures, the students used terms that locked them into a particular neoliberal worldview (Ball, 2007). So while many of them bemoaned their new situations in their new contexts, they also 'conceded that they had few other options'. Giroux (2012) cautions that when students and parents start thinking and using terms that seem to legitimise what is unfolding, then the increase in 'youth disposability will be inevitable'.

Also disconcerting is that the identities of students as they 'become and unbecome' (Fataar, 2015) in their environments, inevitably rupture under the stress of internal and external ambiguities. Students struggle at the best of times to shape and define their identities, but in spaces of uncertainty and difficulty where the marketplace gets to decide what your key make-ups are, the danger of further student confusion is ever-present.

How would a new marketplace of choice operate in an overalled public education system? Fataar (2015) has already shown some of the dangers of translocality (students moving across a city in search of education) and Soudien (2012) has disclosed how identities meta morph in spaces where students try making sense of their situations (often bad). How would this play out for much larger numbers of students moving within and across cities in South Africa; moving from rural to urban, township to suburban, low-fee to higher-fee? How would imminent identity ruptures be managed in situations where searching for 'better quality education' has no guarantees, neither of success in schools nor finding jobs once leaving schools?

How would students imagine their futures in the above noted new-order that bridges public and private configurations? How would they in such a space effect and demand their rights to education, as stipulated in the constitution? To what extent, if at all, can private sector initiatives interrupt the inevitabilities that currently characterise the majority of student lives in South Africa?

Based on engagements with the 22 students in the study and listening to many of their fractured experiences (both good and bad) as they navigated different educational experiences many of which they felt were quite commodified, it seems unlikely that this can be massified to a wider student audience. While it is clear that philanthropic participation (as in scholarships) in public education has brought undoubted relief for many students in dire need, and will continue to do so, how this kind of approach could be rolled-out to larger numbers of students remains deeply questionable.

Philanthropic organisations and their current work seem to hold in tension many of the debates raised in the dissertation - tensions of possibility and improbability, failure and success, laughter and pain – and offer some deep insights into the difficulties and complexities of public-private initiatives and how they may play out within the current education landscape in South Africa. There is much to learn and contemplate in the unfolding contemporary moment.

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Appendix

Appendix A: Sample Participant Information Sheet

Title of the Study:

Philanthropy, Scholarships and Student navigations in a changing South African educational landscape.

Principal Researcher: Helen Day

Department: School of Education, Faculty of Humanities

Email: **DWTHEL001**@myuct.ac.za

Dear Research Participant

I would like to invite you to take part in a research study titled *Philanthropy, Scholarships and relations with youth in the changing education landscape of South Africa.*

Please take time to read the following information carefully and ask questions if anything you read is not clear or if you would like more information.

Who am I and what is this study about?

My name is Helen Day, a Master of Education student at the University of Cape Town.

The topic of my research project is: *Philanthropy, Scholarships and Student navigations in a changing South African educational landscape.* This research project revolves around philanthropic contributions to education in the form of scholarships. My interest is in how philanthropy and the role of external role players change the way in which the public sector is expected to operate.

I am hoping to consider how scholarship organisations and their contributions influence or re-orientate conceptualisations of South African public schooling. Through the insertion of the private into the public by way of an organisation like a scholarship, the central problematic the study will aim to address is the experience of public education through a philanthropic organisation.

What will taking part involve?

The research process will consist of semi-structured interviews. Your participation will require you to share your experiences.

Why have you been invited to take part?

You have been identified based on your status on the chosen South African scholarship programme. As a senior students in the programme, enrolled at tertiary institutes or as a 2019 graduates your experience will provide valuable contribution to the research project.

Your participation in this research is completely voluntary, and you have the right to refuse participation, refuse to answer any question, and to withdraw from the study at any time without any consequences whatsoever.

What are the possible risks and benefits of taking part?

There are no foreseeable risks of physical, psychological or social harm to participants that might result from or occur in the course of this research.

Equity and social justice have a reciprocal relationship with the provision of quality education. Currently, multiple actors have influence over different educational issues and therefore, are making decisions around policies that influence the enactments and understanding of education in society. Considering the increase in philanthropy and public-private partnerships this research project will explore the issue from two perspectives, how public education is provided through philanthropic contributions like scholarships and how the students experience this in relation to their experience of public education. Your participation in this study facilitates the insertion of the voices of the student experiences.

Will taking part be confidential?

Confidentiality pertains to the treatment of information that an individual has disclosed in a relationship of trust and with the expectation that it will not be divulged to others without permission in ways that are inconsistent with the understanding of the original disclosure.

Privacy is the control over the extent, timing, and circumstances of sharing oneself (physically, behaviourally, or intellectually) with others.

During the informed consent process, you will be informed of the precautions that will be

taken to protect the confidentiality of the data and be informed of the parties who may have access to the data. This will allow you to decide about the adequacy of the protections and the acceptability of the possible release of private information to the interested parties.

It may be necessary to collect and link identifying information (e.g., subjects' names) to subjects' responses (e.g., questionnaire answers), but the researcher will provide the utmost confidentiality of subject data. The following are practices that will be implemented to increase the level of confidentiality:

- Use of codes on data documents (e.g., completed questionnaire) to record identifying information and keep a separate document that links the study code to subjects' identifying information (e.g., only allowing primary researcher access);
- Encrypt identifiable data;
- Remove face sheets containing identifiers (e.g., names and addresses) from survey instruments containing data after receiving from study participants;
- Limit access to identifiable information;
- Securely store data documents within locked locations.

Additionally, the follow contextual information will not be made available on the research participants:

- Addresses
- Relatives' names or addresses
- Phone number
- E-mail addresses
- Identity numbers
- Full face photos & comparable images.

There will be non-anonymised data in the form of signed consent forms and audio recordings collected as part of the research process.

<u>How will information provided be recorded, stored and protected?</u>

Signed consent forms and original audio recordings will be retained in an encrypted external hard drive only the researcher will have access to. A transcript of interviews in which all identifying information has been removed will be retained for a further two

years after this. Under freedom of information legislation, you are entitled to access the information you have provided at any time.

What will happen to the results of the study?

This research will be submitted to the University of Cape Town in order to graduate with a Master Education degree.

Who should you contact for further information?

This research is affiliated with University of Cape Town in School of Education, Faculty of Humanities.

Physical address:
Humanities Postgraduate Office
Beattie Building, University Avenue
Upper Campus
University of Cape Town
Rondebosch

Supervisors:

Prof. Azeem Badroodien (Supervisor) Azeem.Badroodien@uct.ac.za

Thank you and I look forward to your participation.

---------- ----------

Signature of researcher Date

Appendix B: Sample Student Consent form

Project Title: Philanthropy, Scholarships and Student navigations in a changing South African educational landscape.

Principal Researcher: Helen Day

Department: Humanities - Education

Email: DWTHEL001@myuct.ac.za

Date completed

BIOGRAPHICAL INFORMATION

Surname

Full names

Preferred name

Date of Birth

Institution attending

Your cellphone number

Your e-mail address

CONSENT AND CONFIDENTIALITY:

Consent to take part in research

- I..... voluntarily agree to participate in this research study.
- I understand that even if I agree to participate now, I can withdraw at any time or refuse to answer any question without any consequences of any kind.
- I understand that I can withdraw permission to use data from my interview within two weeks after the interview, in which case the material will be deleted.
- I have had the purpose and nature of the study explained to me in writing and I have had the opportunity to ask questions about the study.
- I understand that participation involves participation in an interview.
- I understand that I will not benefit directly from participating in this research.
- I agree to my interview being recorded.
- I understand that all information I provide for this study will be treated confidentially.
- I understand that in any report on the results of this research my identity will remain anonymous. This will be done by changing my name and disguising any details of my interview which may reveal my identity or the identity of people I speak about.
- I understand that disguised extracts from my interview may be quoted in the dissertation of the researcher.
- I understand that if I inform the researcher that myself or someone else is at risk of harm they may have to report this to the relevant authorities - they will discuss this with me first but may be required to report with or without my permission.
- I understand that signed consent forms and original audio recordings will be retained in possession of the researcher, Helen Day on a password protected platform or in a locked safe. This will only be accessed by people she feels requires access such as for commentary but they will also adhere to all issues of confidentiality and privacy requirements.
- I understand that a transcript of my interview in which all identifying information has been removed will be retained.

- I understand that under freedom of information legalisation I am entitled to access the information I have provided at any time while it is in storage as specified above.
- I understand that I am free to contact any of the people involved in the research to seek further clarification and information.

Signature of research participant:

---------- ----------

Signature of participant Date

Signature of researcher:

I believe the participant is giving informed consent to participate in this study

---------- ----------

Signature of researcher Date

Appendix C: Sample MoU with Scholarship Foundation

Memorandum of Understanding

Between

Helen Day (DWTHEL001)

ID Number: 9011101

M.Ed Research Project in Education Policy, Leadership and Change

School of Education, Faculty of Humanities

And

Insert Name of Scholarship Foundation

[Insert Company registration Number]

Recordal

Helen Day is currently registered for a research project approved by the University of Cape Town on the following research:

Title of Research Project:

Philanthropy, Scholarships and Student navigations in a changing South African educational landscape.

This Memorandum of Understanding (MOU) sets for the terms and understanding between the Helen Day and the Scholarship Foundation for access to the information required for the purposes of this research project.

Research

The following research activities will be conducted through access provided by the Scholarship Foundation to research participants:

- Interviews conducted with sample of the Scholarship Foundation scholars
- Recording of Interviews
- Transcribing of Interviews

- Use of this content for minor dissertation in completion of above state research project.

Agreement

Both Parties agree to the following:

1. That prior written approval is required before using the other Party's name, logo, or other Intellectual Property rights in any associated publicity.
2. Should the research activities under this MoU result in any potential for intellectual property, each Party shall seek an equitable and fair agreement as to ownership and other interests that may arise.

Confidentiality

The research will result in access to confidential information about study sites and participants. This information will be maintained confidentially. Specifically:

- names and any other identifying information about study sites and participants is completely confidential.
- no information obtained in the course of this research project that could identify the persons or institutions that participated in the study will be divulged, published, or otherwise make known to unauthorized persons or to the public unless specifically authorized to do so by approved protocol or by the local principal investigator acting in response to applicable law or court order, or public health or clinical need .

General

The headings to the paragraphs in this Agreement are merely for the purpose of convenience, and shall not be taken into account in the interpretation or construction of any provision of this Agreement.

No amendment of this Agreement shall be of force or effect unless reduced to writing and signed by the parties to this Agreement.

Signed for and on behalf of

[Name of Scholarship Foundation] by its Authorized representative: _____ Signature _____ Name _____ Title _____ Date	**Helen Day:** _____ Signature _____ Name _____ Title _____ Date

Appendix D: Research Instrument (Interview schedule)

The main research question that will be answered is:

What is the influence of philanthropy through scholarships on selected youth experiences of public education in South Africa?

In order to address this question, two sets of data will be investigated by three sub-questions:

4. What is known about the contribution of philanthropy to students in the public education sector in South African?
5. How do different recipients come to hear about and receive the scholarship?
6. How do scholarship recipients describe their collective experience of philanthropy as members of public education?

Data will be gathered by conducting in-depth interviews with the use of open-ended questions. The questions that will be used are outlined below:

Interview Questions for students:

1. **Name:**
2. **Home Province:**
3. **Province of Study:**
4. **Degree:**
5. **Tell me about yourself?**
6. **Tell me about your educational experiences up to this moment?**
7. **Describe how you became part of the scholarship programme?**
   PROMPTS:
   - Where did they hear about the programme?
   - Who was instrumental in helping them onto the programme?
   - What was the experience of the application process?
8. **Tell me why you decided to apply to a scholarship programme?**
9. **Tell me about your experiences with the programme when you just joined?**
10. **What does/did this programme offer you? Educational or otherwise?**
    PROMPTS:
    - Reflect on memories in your first year on the programme.
    - What does the programme provide?
    - What does the programme NOT provide?

- What should the programme provide?

11. Explain how you feel about the support offered through the programme?

PROMPTS:

- What pressure did you feel being the scholarship, if any?

12. Describe your experience of the programme and how it has changed over time?

PROMPTS:

- Describe your experience in terms of support offered through the programme.
- What has been highlights/lowlights for you since being on the programme?
- What influenced/changed this?
- Why do you think it changed?

13. How has this experience influenced your life?

PROMPTS:

- Has it made a difference in any way?
- In what way has it made a difference?
- If it has made no difference, why is this the case?

14. What are your most poignant memories of your time on the programme?

PROMPTS:

- Why do you think these memories stand out to you?

15. Describe how receiving the bursary has changed your educational experience/s?

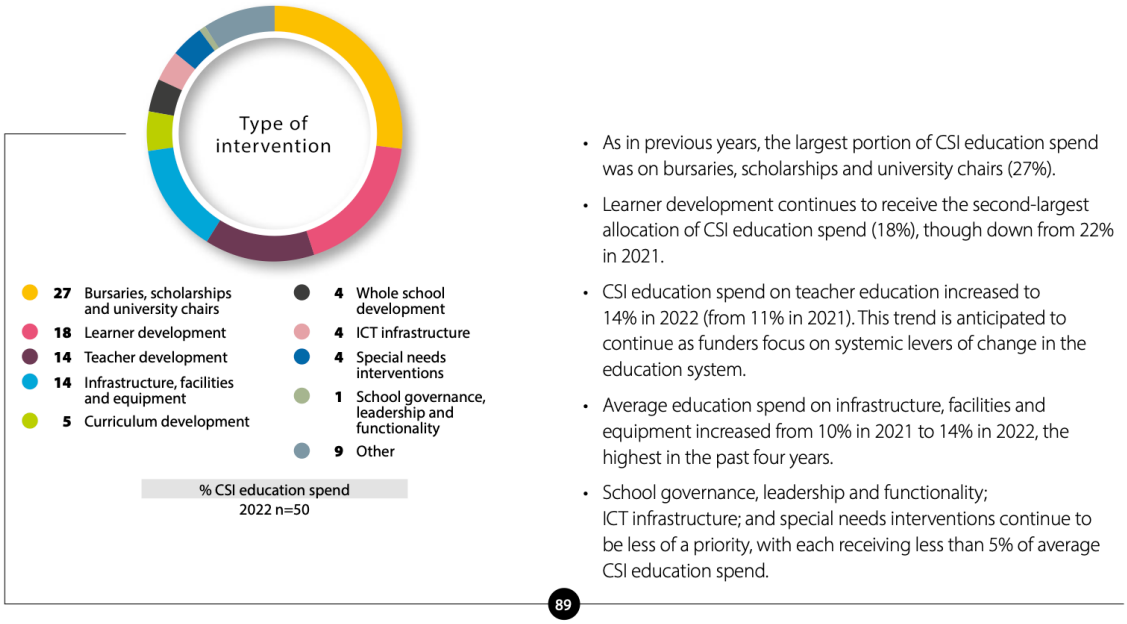
PROMPTS:

- Is there a comparison before vs after in how you experience education.

FOLLOW-UP:

- How did this influence how you see yourself and your education?

Appendix E: Data on Scholarship for Education in South Africa



Source: Screenshot from: Trialogue. (2022). Trialogue Business in Society handbook. Trialogue, pp. 106.