

A CRITICAL POLICY ANALYSIS OF THE  
PROPOSED COMPULSORY HISTORY POLICY OF 2018

Submitted by  
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in fulfilment of the requirements for the degree of Masters in Education,  
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## Declaration

Submitted in fulfilment of the requirements for the degree of Masters in Education,  
in the Graduate Programme of Education and Development, University of KwaZulu-Natal,  
Pietermaritzburg, South Africa.

I, Lucinda Jane Coelho, declare that

1. The research reported in this thesis, except where otherwise indicated, is my original research.
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Signature

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Name of Supervisor



Signature

### **Dedication**

This thesis could never have been done without the kind patience, endless encouragement and creative mind of Jane Quin – a supervisor in the best possible way. Thank you so much for not throwing the towel at me, never mind throwing it in. A massive thank you too, to Norma Rudolph, for similarly being a great encourager, and for refusing to allow careless reading, thinking and writing. And for giving me so much of your precious time to grapple through this WPR discipline.

## Abstract

Using a Critical Policy Analysis tool known as *What's the Problem Represented to be?* (WPR), I examine a proposed policy to make school History compulsory in South Africa. I apply the tool to three documents that address the proposed policy. The main objective of this particular critical policy approach is to offer a specific kind of theorising and policy analysis that makes politics visible by revealing how policies produce 'problems'. WPR "offers seven interrelated forms of questioning and analysis to critically scrutinize problematizations (the ways in which "problems" are produced and represented) in governmental policies and practices, understood in broad terms" (Bacchi & Goodwin, 2016, p. 13). This approach challenges traditional policy analysis that assumes that problems exist outside of policies, ready to be solved. WPR involves analysing how problems are conceptualised and produced as particular kinds of problems within policies. It also reveals the underlying assumptions, gaps and effects of the 'problem' construction. The compulsory History proposal has provoked much debate with inferences that the imperatives for this unrealistic plan are more about cynical and parochial political objectives than educational and empowering objectives. My study aims to contribute to this debate, and to explore how the particular 'problem' representation may result in a compromise of democratic governance commitments. From the WPR analysis, I posit that the compulsory History policy proposal seeks more to construct learners as obedient and compliant citizens that support the current regime, rather than develop critical thinkers who will be active citizens safeguarding democracy in South Africa. The implications of this kind of policy-making practice for democracy in South Africa is alarming, indicating a trend dissonant from the discourse of the South African Constitution. This appears to align with a neo-liberal fight-back in a significant number of other countries around the world. If this is indeed a trend locally, then the rigorous analysis of legitimated policy making is an important step towards political resistance for freedom-loving democrats in South Africa, and even internationally.

Key words:

Critical Policy Analysis, What's the Problem Represented to be, democracy, identity, citizenship, nation-building, education, compulsory History, political resistance

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## Acronyms

4IR	Fourth Industrial Revolution
APS	Admission Point Scores
AI	Amnesty International
ANC	African National Congress
ASGISA	Accelerated and Shared Growth Initiative for South Africa
BE	Bantu Education
CAPS	Curriculum Assessment Policy Statements
CNE	Christian National Education
COE	Council of Europe
CPTD	Continuing Professional Teacher Development
DBE	Department of Basic Education
DfE	Department for Education (UK)
DHET	Department of Higher Education & Training
EDU	Education & Training Unit for Democracy & Development
FET	Further Education and Training
GEAR	Growth, Employment and Redistribution
GET	General Education and Training
GCED	Global Citizenship Education
GNU	Government of National Unity
HMTT	History Ministerial Task Team
HSRC	Human Sciences Research Council
IPET	Initial Professional Education and Training
LO	Life Orientation
NAPTOSA	National Professional Teachers' Organisation of South Africa
NDP	National Development Plan

NECC	National Education Crisis Committee
NEPA	National Education Policy Act
NETF	National Education and Training Forum
NGO	Non-governmental Organisation
NGP	New Growth Path
NP	National Party
NQF	National Qualifications Framework
OBE	Outcomes-Based Education
Ofsted	Office for Standards in Education, Children's Services and Skills (UK)
RDP	Reconstruction and Development Programme
RET	Radical Economic Transformation
RNCS	Revised National Curriculum Statements
SADTU	South African Democratic Teachers' Union
SAG	South African Government
SAOU	Suid Afrikaanse Onderwysers Unie
SAQA	South African Qualifications Authority
SASA	South African Schools Act
SGBs	School Governing Bodies
TORs	Terms of Reference
TRC	Truth and Reconciliation Commission
TVET	Training and Vocational Education and Training
UK	United Kingdom
UNESCO	United Nations Educational, Scientific and Cultural Organization
US	United States

## Chapter 1: Introduction

This thesis draws on a critical policy analysis tool called *What's the Problem Represented to be?* (WPR) (Bacchi, 2009, 2012, 2015, 2017, 2018, 2021) to explore a policy proposal to make school History compulsory put forward by the Department of Basic Education in South Africa in 2018, in order to understand what led to the formulation of that particular policy proposal.

The main question this thesis asks is “Drawing from Critical Policy Analysis theory, what does a WPR Analysis examining the discourse of the proposed compulsory History policy of 2018 reveal about how the current government is or is not promoting democracy in post-1994 South Africa through its policy deliberations and decisions?”

The particular Critical Policy Analysis (CPA) tool to be used was formulated by Carol Bacchi, and is known as *What's the Problem represented to be*. This tool will be used to analyse a policy proposal that the South African Department of Basic Education (DBE) is currently championing to make History a compulsory school subject. The **objective** of the analysis is to reveal how the proposed policy reflects the way that the DBE has problematized the issues that they hope their proposal will address. My **aim** in exploring this dynamic is to shine a light on what has led to this policy proposal, what that indicates about the imperatives driving governance currently, and what the possible implications of this may be for us citizens of a new democracy, wondering how we should respond to this trajectory of policy formulation, that may be more problematic than it appears in respect of democracy building.

My concerns are based on two aspects of this scenario: Firstly, the fear of an alarming phenomenon of South African history repeating itself under a totally different regime. Secondly, from a perspective of promoting a democratic future, my concern is to examine how the current South African government conceives of its governing “mandate” (as expressed so clearly in the Constitution) through policy making. I have noted an erosion of the ideals of democracy as expressed in the Constitution of South Africa since we passed the initial heady days of the “Rainbow Nation<sup>1</sup>”, as steered by Nelson Mandela.

In this introductory chapter, I will firstly detail the motivations for my inquiry, and then present the structure of the enquiry, followed by a discussion of CPA by way of providing the starting point of this thesis.

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<sup>1</sup> The term Rainbow Nation” is ascribed to Archbishop Emeritus Desmond Tutu when he attempted to foster calm after the assassination of Chris Hani in 1993, saying “We are the rainbow people of God! We are marching to freedom! Black and white together.” (Motlanthe, 2021). Mandela took up the term in 1994 and it has stuck since, becoming part of the lexicon of South African political language.

## **Motivations**

The discipline of History taught in schools has a special place in the struggle for democracy, everywhere (Caretero, 2011; Haydn, 2012), but especially in South Africa (Bertram, & Wasserman, 2015; Cross, 1994). The primary motivation of this thesis is to explore how policy makers in South Africa in the post-Apartheid context have interpreted the role of History education in schools, and how this has affected policy-making.

The way in which the history of a place is recorded and presented in many ways determines how citizens understand their own present, their own past, and associated with that, their complex identities (Auerbach, 1964; Christie & Collins, 1982; Cross, 1994; Ferro, 2003; Haydn, 2012 and others). This places an unusual burden on this subject, making it vulnerable to abuse for ulterior motives, whether conscious and explicit or unconscious and implicit. Schooling is integral to the socialisation process (Bronfenbrenner, 2006; Robson, 2019), being the space most modern children spend as much as a third of their time, and where they are exposed to the social and cultural norms and practices of their particular societies, at any given time (Bint, 1998). History in schools is also an important point of socialisation being the mechanism through which most children are exposed to the narrative of their own pasts as well as to the history of other places in the world, giving them some perspectives of human history, and importantly, a personal and a collective understanding of identity (Ferro, 2003; Haydn, 2012, 2022). History and identity making are therefore closely intertwined. Identity is a powerful aspect of how people exist within community, both as individuals and as members of a collective society (Liu & Lazlo, 2007).

In South Africa, the school History curriculum was explicitly used by the Apartheid state to explain and justify the developing hegemony of white descendants of Europeans, from the mid-19th century until 1994 (Auerbach, 1964; Christie & Collins, 1982; Cross, 1994; Hofmeyr, 1982; Rehman, 2008; Van Heyningen, 1960). Likewise, a different telling of history made up the narrative that was espoused and disseminated by the various liberation movements to justify the struggle against colonial and Afrikaner hegemony (Bertram & Wasserman, 2015; Calinicos, 1986; Cross, Carpentierb, and Ait-Mehdib, 2008; Ferro, 2003; Masooa & Twala, 2014; Siebörger, 1993). I propose in this thesis that from two opposite ends of an ideological continuum, and the spaces between, History has been used through policy decisions, to serve the interests of the ruling party. Despite the differences, a narrative of national pride brought these positions closer than they may like to acknowledge. In 2014, the Department of Basic Education (DBE) put in motion a process to make History a compulsory school subject at the Further Education and Training (FET) level, to make it one of four core, or compulsory, subjects.

By way of background, learners in South Africa are currently required to take seven subjects to qualify for matriculation. While Life Orientation (LO) is currently the fourth compulsory subject, the current DBE proposal on the table recommends that History replace LO in a phased manner. In 2015 the DBE appointed a History Ministerial Task Team (HMTT) “to oversee the implementation of compulsory History in the Further Education and Training (FET) schools, Grades 10 - 12.” (SAGe, 2015, p. 1). In 2018, the HMTT presented the DBE with a report on their findings, including an endorsement of the idea to make History compulsory, despite identified challenges and considerable opposition to the notion. Also, in 2018, the DBE reappointed the same task team “To develop a new History curriculum from Grade 4 to 12” (SAGf, 2018, para. 3) and associated activities, and “To propose History Teacher development programmes for both Initial Teacher Education (ITE) and In-service Teacher Education” (para. 3).

In response to this proposal, a number of commentators have challenged the DBE proposal to make History a compulsory school subject in South Africa as of 2023, suggesting that the move is for political gain (Bailey, 2019, Noor Davids, 2016; Rehman, 2008; Van Eerden & Warnich, 2018) rather than to build a critical and informed citizenry with a legitimate understanding of change over time and place, for the purposes of building the kind of democracy dreamed of in the Constitution of South Africa (Motshekga, 2014). In 2014, Minister Motshekga expressly included as part of her explanation for introducing compulsory History, that it, “Has a number of positive effects such as contributing to nation-building, national pride, patriotism, social cohesion and cultural heritage” (M&G Staff reporter, 2014, para. 3).

In contrast to this criticism, there are those who put forward the notion that a study of History is at least essential for the protection of democracy, and at best can be a powerful tool to promote democracy. Carr (1998) notes that curricula can (and should) be consciously designed for democracy. Others note that historical literacy is a powerful tool to understand what is happening in the present, understand democracy, “read” anti-democratic trends and become participants in protecting democracy (Keane, 2019; Martin, 2019; Sears, 2017; Tibbits & Weldon, 2017). Indeed, Minister Motshekga, presenting another view to the one expressed earlier, in her speech to Parliament in 2015 notes these important functions, “It is only through History as a subject that we can promote the principles of non-racialism, non-sexism and the supremacy of democracy over anarchy” (para. 15).

Clearly, the discipline of History can be used for such contradictory purposes as building critical thinking skills in the service of democracy, or for promoting narrow nationalist interests of a particular agency for a particular purpose, often self-serving. An examination of the policy-making process of the current proposal by the DBE to make History a compulsory school subject will assist me to reveal what

the current dynamic is about. By examining what the DBE (as policy makers) have identified as being the solution, we will gain insight into what “problem” they are hoping to solve. By understanding this problematisation, it will become clearer what trajectory of governance the government is pursuing.

So far (by 2021) there is not yet a policy in place but there is a mature policy-making process underway, albeit moving along in fits and starts. Since 2014, a number of actions have taken place. The idea to make History compulsory has been mooted in parliament. It has been presented to the public by way of media statements. A History Ministerial Task Team (HMTT) has been appointed to examine the issue, with specific terms of reference to guide their work. This HMTT has presented to relevant stakeholders. Specific fora have been convened at which the matter has been discussed. The HMTT has presented their recommendations in a report to the Minister in 2018. The Minister has reappointed the same team to do further work based on the assumption that the policy will be enacted. There has been extensive comment in the public and academic press<sup>2</sup>.

In summary, by using a version of Carol Bacchi’s WPR tool, I will examine this policy-making process to understand how the proposal formulated by the policy actors came about, how this problematisation is represented and what it reveals about the “deep-seated unexamined ways of thinking” (Foucault, in Bacchi, 2018, para. 6) that underpin specific policy proposals and shape “problems” as particular kinds of problems” (Bacchi, 2018c, para 5). In doing this, I will seek to uncover how the problem is represented in the proposed policy, what presuppositions and assumptions were made that guided this representation, and what contextual factors have influenced the thinking. Once this is clear, it will be possible to see what has *not* been included in the process – that which Bacchi refers to as the “silences”. With this elucidation of the problematisation and silences, it becomes possible to make inferences about the possible effects and implications of the proposed policy, including the embedded interests that such a policy would serve. This understanding then enables the considered response put forward in this thesis.

The objective of the exercise is twofold. Firstly to understand how the DBE has constructed this problematisation. Secondly, by shining a light on the assumptions and limitations in the way DBE has constructed the problem to reveal the potential implications of the proposal in respect of governance

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<sup>2</sup> Two examples would be:

Bailey, M. (2018a). The History Ministerial Task Team fails to explain why compulsory matric history is necessary. *Daily Maverick*. Retrieved from <https://www.dailymaverick.co.za/opinionista/2018-09-19-the-history-ministerial-task-team-fails-to-explain-why-compulsory-matric-history-is-necessary/>

Businesstech (2021). Here are the changes announced for schools in South Africa this week. *Business Tech*. Retrieved from <https://businesstech.co.za/news/government/497819/here-are-the-changes-announced-for-schools-in-south-africa-this-week/>

practices, I hope to contribute to the debate about the proposed compulsory History proposal in the context of contemporary South Africa. Or as Bacchi quotes Savage, to “agitate the field” (Savage in Bacchi, 2021).

Importantly, I am *not aiming to interpret the proposed History proposal*, but rather to understand the governance, thinking and practice around this particular proposal. As Bacchi says,

*... WPR does not involve an interpretive exercise. The goal is not to consider people’s different views on a “problem” but to reflect on how governing takes place through problematizations – through the ways in which “problems” are produced (or constituted or enacted) as particular sorts of problems* (Bacchi, 2018b, para. 12).

In addition to the above two objectives, and as discussed in Chapter 4 of this dissertation, the WPR approach and tools are based on a critical discourse analysis, therefore an integral part of the findings of the analysis will be inferences regarding the power relations inherent in both the way that the problem has been represented and the proposal designed to address the “problem”.

Bacchi has formulated an analytic strategy, or ‘tool’, that she named “*What’s the Problem Represented to be?*” (Bacchi & Goodwin, 2016, p13). The main objective of this WPR approach is to offer a particular kind of theorising and policy analysis that makes politics visible by revealing how policies produce ‘problems’. WPR “offers seven interrelated forms of questioning and analysis to critically scrutinize problematizations (the ways in which “problems” are produced and represented) in governmental policies and practices, understood in broad terms” (Bacchi & Goodwin, 2016, p.13). This approach challenges traditional policy analysis that assumes that problems exist outside of policies, ready to be solved. WPR involves analysing how problems are conceptualised and produced as particular kinds of problems within policies (Bacchi, 2018b, Bacchi & Goodwin, 2016). This form of analysis also reveals the underlying assumptions and effects of the ‘problem’ construction.

I construct the data for my study by using the WPR approach to analyse three documents, namely:

1. A key statement made by Angie Motshekga, Minister of Basic Education in 2015, in relation to the proposed policy, after which the History Ministerial Task Team (HMTT) was appointed against a specified Terms of Reference to investigate issues related to the making History compulsory as a matriculation subject.
2. The Terms of Reference for the formulation of the HMTT.
3. The proposed History recommendations as presented to the Education Ministry by the HMTT.

In respect of how I have worked with the data, I was faced with a conundrum: either I would examine each document in detail, applying the WPR methodology to each document separately; or I would take

the documents as a trio and apply the WPR questions to them as a group. In the end, I rejected the first option on the basis that I found that it was inconsistent with the focus of my thesis. Had I been doing a plain discourse analysis of the three documents to see what they revealed, this methodology may have been appropriate. However, as I was aiming to reveal what the source documents revealed about policy thinking, formulation and making in respect of the proposed compulsory History policy, I found it to be more credible to take the three source documents as a whole, and see how collectively they revealed and articulated how the DBE was problematizing the issues for which their proposal was seen to be the solution.

In addition to the primary explanation above, to carry out such a detailed analysis of the three texts would have been an unmanageably large task in the context of a master's thesis. If I had rationalised the task by taking examples, such as the tables in Appendix 3 demonstrate, then I would have been liable for a charge of dereliction in respect of which examples were not chosen, as which ones were. I elected to resolve this conundrum by looking at all three source documents together, and applying them to my key questions, using the WPR questions as guidelines.

The particular history of South Africa (set out in Chapter 3), makes the subject of my inquiry especially relevant, given the political crisis that currently undermines this country. The ANC is in crisis (Gross, 2022; Mack, 2022; Mathekga, 2022; Matisonn, 2022; PoliticsWeb, 2017; Suttner, 2022; Suttner, 2021) and their policies appear to lack consistency and coherence in respect of the 1994 version of democracy that is infused into the Constitution.

### **Thesis Statement**

My thesis is set out as follows to address the main question asking:

Drawing from Critical Policy Analysis theory, what does a WPR Analysis examining the discourse of the proposed compulsory History policy of 2018 reveal about how the current government is or is not promoting democracy in post-1994 South Africa through its policy deliberations and decisions?

To answer this question, I will respond to the following two sub-questions by applying the WPR process to the selected documents (and to myself):

1. What does the WPR analysis of the three selected documents reveal about the proposed compulsory History policy, in the contemporary (and historical) context?
2. What are the possible implications of this finding for the case of promoting democracy in South Africa?



In my inquiry, I explore what a critical examination of the proposed compulsory History policy *process* of the past six years reveals about how the current government, through the DBE, problematises the issues facing South Africa as illustrated by its policy choices.

The analysis will draw from the findings after applying Bacchi's questions to the three documents, in relation to an understanding of democracy, according to the following process, which is defined by Bacchi's questions:

I will subject the public statement from Ministry of Basic Education, the terms of reference for the HMTT, and proposal made by the HMTT to the WPR questions.

What is the "problem" represented to be in these documents?

1. What "presuppositions or assumptions underpin this representation of the 'problem'" (Bacchi, 2009, 2013, 2017) and where have they come from?
2. What is excluded from the way in which the perceived need for compulsory History education is problematized? What are the gaps (or "silences")? This question opens up the problematisation to see what has shaped what are defined as problems, what is deemed relevant, by whom, and what the impact of these limitations are. It invites interest in what else could/should be included or replaced or changed.
3. How/Where and even by whom has the representation of the need for compulsory History education and the resultant policy been "produced, disseminated and defended"? Policy actors will be examined in so far as they shed light on how policy is formulated, however this will be done in the context of Bacchi's approach and methodology.
4. How is the issue problematized by the researcher (i.e. me), and what is the implication of this for the findings<sup>3</sup>.

The findings from the WPR exercise assist in structuring the discussion and formulation of conclusions in respect of the main question.

### **Scope of the thesis**

The task of doing a CPA, specifically a WPR, to understand what lies embedded in the proposal to make History a compulsory school subject in South Africa was more complex than I realised. The layers

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<sup>3</sup> Given the limitations of this Master's thesis, this section will be less of a Bacchi self-problematisation, and more of a self-reflection.

of influence are wide and extensive, and potentially are larger than the scope of a Master's dissertation. Two aspects are especially complexifying: The theoretical notions of democracy, citizenship, and nationalism within the role of education, on the one hand, and historical context on the other. Both aspects have a critical influence on the subject of my thesis. The first aspect, because of its theoretical basis, has been addressed in Chapter 2 as part of the literature review. The second aspect is discussed separately in Chapter 3. The nature of the South African context added a complex set of layers to the study, considering the role that school History has played in this process. It is how the context of Apartheid and the context of the democratic post-1994 has shaped and been shaped by policy that is material to this analysis. The very nature of this *critical* analysis requires contextualisation in terms of time and place (Bacchi, 2009, 2021a; Bacchi & Goodwin, 2016; Fairclough, 2013; Foucault, 1982; Luke, 1995). The background and context of the material reality is key to understanding the issues central to this thesis, and is aligned to the methodology. It is critical to bring historicity into understanding the present (Carretero, 2011; Ferro, 2003; Martin, 2019; McDonald, 2016; Robinson, 2018). This is true of the broader context. It is also true of the subject of this study. The relationship between how the material reality, governance and power (Foucault, 1982) of the South African government continues to evolve over time.

### **Structure of the thesis**

Chapter 1 introduces my thesis, providing a description of my focus of study, or thesis statement, the thesis structure, an overview of the findings and my motivation and position.

The literature review I present in Chapter 2 will provide a broad conceptual and theoretical framework. The discussion will reference an ecosystemic approach within which the primary question of my thesis should be understood.

In presenting the contextual framing of the study in Chapter 3, I present a historico-political narrative that highlights the issues that inform my research study, moving from the general to the particular. Examining this contextual representation critically enables analytical application of the findings from the three source documents, within the broader question posed by this thesis in relation to my understanding of the trajectory of democracy in South Africa.

In Chapter 4, I describe the methodology and data collection process. I present the research questions in relation to the focus subject. That is, the proposal to introduce History as a compulsory school subject. The three primary data source objects are introduced, and the way in which they will be analysed. Finally the WPR tool will be described in full, including the approach, the steps and how this methodology will be applied to the data sources.

Chapter 5 presents the analysis and findings of the WPR exercise, including identifying what the problem defined by the DBE proposal is represented to be, according to the application of Bacchi's tool. In this chapter, the first four of Bacchi's questions will be used to analyse the three documents.

In Chapter 6, I present the findings of the WPR process (using Bacchi's Questions Five and Six) and then analyse, discuss and draw conclusions from the findings in relation to my main research question, examining what the WPR analysis reveals about the proposed compulsory History policy as well as the policy making process, and how the concomitant implications for the trajectory of democracy in South Africa can be understood. I consider if what emerges has any alignment with trends elsewhere in the world at this time.

The concluding Chapter 7 of the thesis will draw from Bacchi's seventh step to assist me to reflect on the process of my research, and the conclusions and findings of the process. In this chapter, I will also discuss the challenges and limitations of the inquiry process for me, with some ideas for possible future research.

### **Who am I, and how does this affect the study?**

I am a South African, designated white in a still racialised society. I define myself as a woman, a mother an eco-socialist activist and a citizen of a defined geographical space, and a dweller of the earth. I am now and have always been, committed to socioeconomic, environmental political and cultural justice.

I was a high school History teacher from 1995 to 2002, and a general teacher and school librarian for eight years prior to that. I also taught in a college, teaching Life Orientation for a year. I have developed History and Life Orientation teacher training material, and have sustained my education by reading for an Honours and Masters in Education, within the school of Education and Development in recent years.

In respect of my History teaching experience, the late 1980s in South Africa was an exciting but daunting time to be a teacher. The struggle against Apartheid was, since the mid-1970s, led and fought by the youth. By the 1970s and 1980s, these youngsters were militant and literate and angry with their parents, as well as with the state. They were excited by the ideas of Steve Biko and Frantz Fanon, they were formulating a narrative of political expression much more radical than that of the 1960's style African National Congress. Teaching History in this context was not plain sailing. As the 1990s came and the historic changes with the unbanning of the liberation movements, the freeing of Mandela and eventually the first free and fair democratic elections of 1994, history was literally being written in bold, day by day, while the History curriculum was still telling rapidly outdated stories.

It was also the time of massive rethinking, reimagining, and the huge pressure for redress. Education was an obvious site of change.

With the idealistic OBE, there was a dream to cross the massive skills divide. For History teachers in progressive schools, a skills approach was welcome. I used to half-joke with my students that if I was Minister of Education, I would make History compulsory. I said this because, as a History teacher, I was convinced that History was one of the few subjects that explicitly lent itself to developing critical and creative thinking. I found that the easiest way to teach History and to make it relevant to the learners, was to work primarily with historical and critical thinking skills, and secondarily with the historical narrative: the latter being the vehicle for the former. In the school that I worked in, History was a popular school subject, certainly because it was a place of lively discussion, of argument and contestation, and of sense making in a highly confusing context. I was certain that if young people knew how to think about the narratives that shaped their lives, then they would be good citizens, by which I meant that they would stand up for and actively promote democracy and social justice for themselves and others. They would hold the new and mythologised leaders to account. I did not anticipate that the architects of the great South African Constitution, standing on the shoulders of those that forged the Freedom Charter, would decades later use History to consolidate their power in what appears to me (and many others referenced throughout this study) alarmingly as a manipulative politically-driven strategy.

This thesis is therefore close to my heart.

### **Concluding the Introduction**

My thesis is not strictly a policy analysis given that the subject of the analysis is not a legislated policy. It is also not a *strictly* step-by-step WPR, but rather draws from the lineage of CDA and the framework of WPR to examine a potential policy formulation. However, as Bacchi said at a Contemporary Drug Problems conference in 2017, the WPR approach can be used as a way of thinking critically to interrogate and understand all governmental and knowledge practices. She goes so far as to say that WPR can examine how any form of proposal problematizes within the construction of its proposal – from laws to cultural ceremonies to marketing texts to theoretical propositions and concepts even to buildings such as schools.

In the case of my enquiry, I am broadly composing the main WPR questions into one formulation: If making History compulsory is put forward as the proposal (or the solution, the recommendation) and as the consequent action, (or way forward), then what has been identified as needing to change, i.e. what has been pinpointed as being problematic and how is this “problem” represented, or problematized? What assumptions and presuppositions have characterised the particular conceptualisation? What does it exclude? Finally, what are the implications of this for governance, for the tender state of democracy here in SA at this time, for how citizens should respond?

Given that my aim is to contribute to an open debate on policy-making in general and the compulsory History policy in particular, as a political act, my findings are located not only in the theory of critical discourse analysis but also in understanding the contextual influences of this policy in this place (South Africa) at this time (27 years since 1994), and the implications of this for our future.

My main findings from applying the WPR method to the compulsory History proposal, are that the DBE has developed a policy that it believes will address the “problems” of a lack of social cohesion, a lack of national pride and African identity and a lack of civil obedience to the governance practices of the African National Congress. This problematisation has led to a particular policy development

What is also interesting is that this very trend of making History compulsory at school level, is not occurring in South Africa alone, but is being noted in various and disparate locations from the UK to Zimbabwe to Brazil (Carretero, 2011; Harmse, 2011; Haydn, 2012; Junco, 2011; Sheldon, 2012; Valsiner, 2011; Youngs, 2018).

While it is tempting to ascribe evil intent to the evident problematisation, I am aware that this is neither legitimate nor purposeful, nor is it the object of a WPR process. What is more material, is how this problematisation adds to our understanding of the politics of governance in general and the politics of education in South Africa at this time, and how it may reveal the interests that are being served, and provide insights into how we, as the citizen governed, can choose to respond.

So theoretically, at the heart of the WPR approach is the focus on problematisation (and Bacchi draws directly from Foucault in this) rather than on the problems themselves. The concept of problematisation is key to understanding the WPR approach, and is examined in greater detail in Chapter 3. Bacchi quotes Nicolas Rose who says:

*... If policies, arguments, analyses and prescriptions purport to provide answers, they do so only in relation to a set of questions. Their very status as answers is dependent on the existence of questions. If, for example, imprisonment, marketization, community care are seen as answers, to what are they answers? And in reconstructing the problematisations which accord them intelligibility as answers, these grounds become visible, their limits and presuppositions are opened for investigation in new ways (Bacchi & Goodwin, 2016, p. 19).*

## Chapter 2. Review of literature

### Introduction

In this chapter I present the theoretical framework guiding my inquiry. I begin with the framing theories of Critical Discourse Analysis (CDA), Critical Policy Analysis (CPA) and *What's the Problem Represented to be* (WPR), CPA being nested in CDA, and WPR being nested within CPA. In the context of using the CDA/CPA approach, and applying the WPR methodology to a proposed policy, I have also identified a number of key themes that are relevant to the study, including democracy, citizenship, identity, nation-building, socialisation, and of course, the study of History at school level. These concepts are themselves sites of debate and polemic, and I draw on a number of theorists to lay open the issues related to these concepts. I have also specifically related these concepts to South Africa, in order to build a contextualised understanding of the localised nuances. Overview of Critical Discourse Analysis, Critical Policy Analysis and *What's the Problem Represented to be*

Using CPA and WPR to frame my research gives focus to the inquiry. It enables me to address my key research concerns which focus on the *implications* of a specific policy proposal in respect of power relations as expressed in social practice, in the interests of change and social justice, in a particular context of place and time. It is useful therefore to provide a lineage discussion about Critical Discourse Analysis (CDA), and how it informs CPA, WPR and the focus of my research interest.

### Critical Discourse Analysis, Critical Policy Analysis & What's the Problem represented to be

These three theories form the theoretical framework of my inquiry.

#### *Critical Discourse Analysis as policy analysis tool*

To understand the broader framework of Critical Discourse Analysis, I have developed a consistent understanding of this approach for myself by determining a working 'definition' of discourse, of discourse analysis and then critical discourse analysis, drawing primarily from the work of Fairclough (2013), Kramsch (2014), Janks (1997), Taylor (2004), van Dijk (1985, 2006, 2010), Wodak (2007) and Wodak & Meyer (2008).

Over the years, as the purpose of engaging with discourse has expanded in scope and across disciplines, so the notion has become more complex and more layered, introducing elements such as production and reception, of culture and ideology, of history and context, of power and resistance (Fairclough, 2013; Foucault, 1982; Taylor, 2004; van Dijk, 2010; Wodak, 2007; and Wodak & Meyer, 2008. As Wodak and Meyer say, "discourse means anything from a historical monument, a lieu de mémoire, a policy, a political strategy, narratives in a restricted or broad sense of the term, text, talk, a speech,

topic-related conversations, to language per se” (2009, p. 3). Having such a wide application of the term provides depth to further application. Wodak and Meyer continue, “We find notions such as racist discourse, gendered discourse, discourses on un/employment, media discourse, populist discourse, discourses of the past, and many more” (p. 3), explaining that discourse becomes increasingly complex and confusing by encompassing genre, register and style, and can be applied to a building as much as to a political programme.

There has been vigorous debate over these issues ever since linguists began examining the wider meanings and implications of words and word combinations. According to Teun van Dijk (1985), people have been doing this for the past 2000 years as the study of rhetoric to a greater or lesser degree. Van Dijk credits the revolutions of the latter 19th and early 20th as stimulus to a new critical interest in the subject, although it was not until the 1950s and 1960s and the structuralist movement that academics and other theorists began once again debating the implications of examining the role of language in society, and the impact of society on language. In his historical account of the evolution of discourse analysis, van Dijk describes the early 1970s as the time when this terminology really became part of the lexicon of what was now referred to as sociolinguistic and other cultural studies (1985).

By then the theorists were beginning to talk about the way language was not innocent of the ideology of the speaker, of its context and even its reception. Meaning became an event, an action, a practice. Van Dijk speaks of this development as “soon leading to a more widespread, interdisciplinary and broader study of text-linguistics and discourse, often independently in various countries” (1985, p. 6), as other disciplines, like psychology and sociology in various parts of the world started to integrate these ideas about how people make sense of their environments and their co-habitants into their own frameworks. By 1984, and the publication of the Handbook of Discourse Analysis, this “cross-disciplinary” subject of study had reached a state of autonomy, whereby manifestations of meaning in whatever form were examined as both produced and received in particular spaces and times.

Critical Discourse Analysis brings in the examination of power relations as part of understanding how meaning is expressed as a social practice, in the interests of change and social justice. Ruth Wodak and Michael Meyer tell us that the focus of CDA is to examine complex social phenomena through a “multidisciplinary and multi-methodical approach” (2008, pg. 2). They go on to explain CDA principles, including that,

*... all approaches are problem-oriented, and thus necessarily interdisciplinary and eclectic...Moreover, CDA is characterized by the common interests in de-mystifying ideologies and power through the systematic and retroductable investigation of semiotic data (written, spoken or visual). CDA researchers also attempt to make their own positions and interests*

*explicit while retaining their respective scientific methodologies and while remaining self-reflective of their own research process (p. 3).*

These are all important to my research interest, as I explore how the discourse used by the Department of Basic Education indicates their interest in respect of education, specifically History education.

Although adherents of CDA are comfortable with how loose the approach can be, they do identify with a set of principles, which Wodak and Meyer identify as language use as a social practice. This implies that it needs to be contextualised, and that it is “constitutive as well as socially conditioned” (2008, p. 6). Therefore an overarching concern of CDA theorists is the centrality of history and context. Based on the principles and concerns of CDA, the methodology to unpack this is as open as the various approaches within this school, although there is agreement that research questions are key to understanding what is embedded in social interactions of various types, and that these are tied to what Norman Fairclough calls “the ‘moment’ of the political, political-economic and more generally social which is dialectically related to other elements/moments” (Fairclough, 2013, p. 1).

It is for this reason I have gone to some length to provide an historical context to the subject of my study in the next chapter.

The second key principle mentioned by Wodak and Meyer (2008) is that the work of CDA, by being critical should be directed at social change by “producing and conveying knowledge” (p. 7) that is essentially liberating.

The third principle raises the issue of power. CDA should work at “revealing structures of power and unmasking ideologies” (Wodak and Meyer, 2008, p. 8), where the former refers to inherent relations of dominance reproduced in society, and the latter is defined as those aspects of ordinary everyday life that shapes how people think, speak and behave. Both power and ideology are seen in their social contexts, and are therefore inherent in the language of social interaction (Fairclough, 2013; Wodak and Meyer, 2008). Wodak and Meyer summarise CDA as being focussed on uncovering all “Structural relationships of dominance, discrimination, power and control as manifested in language. In other words, CDA aims to investigate critically social inequality as it is expressed, constituted, legitimized, and so on, by language use (or in discourse)” (p. 10).

Another useful notion put forward by Fairclough (2013) that has relevance to my research interest is what he refers to as a situation where discourse can be recontextualised in multiple fields. In the case of the proposed compulsory History policy in South Africa, I will explore how this proposed policy which originates in current national government discourse, makes reference to a past context which itself has resulted in the adoption of the Constitution in 1996, which has been variously interpreted and



applied since then, and expressed in current changes in legislation. Whose interests are currently being promoted? And is the discourse (spoken in policy) consistent with the discourse that is manifested in the Constitution, as the mother of all South African policy. These are questions that arise in attempting to unpack the discourse of the proposed compulsory History policy.

It is useful to draw in some areas of Critical Policy Analysis to focus my attention.

#### *Critical Policy Analysis<sup>4</sup>*

Working from the position of CDA, theorists producing Critical Policy Analysis positions take the basic principles of CDA and apply these in various ways to understanding policy and how policy is enacted in various contexts. With CPA, policy and policy-making are seen as contextual and as complex. They are, says Taylor *et al*, “sites of struggle over meaning ... and policies are seen as the outcomes of struggles ‘between contenders of competing objectives [where it is critical to examine] the relationship between policy texts and their historical, political, social and cultural contexts.’” (1997, p. 3).

The purpose of CPA requires that we engage with the “struggle over meaning” to reveal agendas underpinning policy planning and implementation. Taylor is paraphrased by Taskoh (2014) who emphasises the centrality of historical context to policy analysis, noting the imperative to ascribe “reactivity and proactivity” (p. 54). The further point is made, that policy planning is an important focus of analysis, but that CPA, “must also be political and strategic [in order to help] the analyst to expose the ways in which agendas are set and framed in favour of dominant interests and ideologies, and identify and overcome obstacles to a democratic process.” (p. 54). Thus CPA shows that policy is never neutral, it can expose how ideology perpetuates specific power interests (Kennedy Lewis, 2014). A CPA will reveal what is inherent in the policy, revealing embedded ideologies and power interests, exposing contradictions where they exist, possibly opening up the policy and practice to debate in the interests of understanding its implementation impact.

It is exactly this dynamic (i.e. the relationship between the discourse, the embedded agenda, the interests being served, and the implication for democracy) that I aim to examine by analysing the proposed compulsory History policy. In the context of looking at the curriculum policy for compulsory History, this approach enables me to understand what embedded issues are contributing to the contradiction between how the current rationale for making History compulsory, as expressed by the Minister of

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<sup>4</sup> In considering the key influences of CPA, I will draw mainly from the work of Fairclough (2013), Luke (1995), Taylor (2004), Taylor, Rizvi, Lingard and Henry (1997), Hyatt (2013), Kennedy-Lewis (2014) and Bacchi (2009, 2012, 2015, 2018, 2019, 2021).

Basic Education and the History Ministerial Task Team (HMTT), appears to be alienated from the objectives of the Constitution, and engenders a serious risk of compromising democracy in a frightening way reminiscent of the education policies of the Apartheid regime. Again, it is noted that this may not be intentional, or strategic, but is no less alarming for its potential to derail the democracy project in South Africa.

While the approach of CDA in many ways informs CPA and Bacchi's '*What's the Problem Represented to be?*' (WPR), it is the methodology of the latter that will be used to analyse the policy and practice of the proposed compulsory History policy in South Africa.

#### *WPR: Problems and problematisation*

In actually carrying out the CPA, I will utilise Carol Bacchi's tools of critical policy analysis, using her WPR questions, which seek to enable a systematic and rigorous process of policy analysis by subjecting policy discourse to six questions and one further step. I will apply these to the proposed policy for implementing compulsory History at Further Education and Training (FET) level. The six questions are summarised by as follows (Bletsas & Beasley, 2012, p. 21):

1. *What's the 'problem' (for example, of 'problem gamblers', 'drug use/abuse', 'gender inequality', 'domestic violence', 'global warming', 'sexual harassment', etc.) represented to be in a specific policy or policy proposal?*
2. *What presuppositions or assumptions underpin this representation of the 'problem'?*
3. *How has this representation of the 'problem' come about?*
4. *What is left unproblematic in this problem representation? Where are the silences? Can the 'problem' be thought about differently?*
5. *What effects are produced by this representation of the 'problem'?*
6. *How/where has this representation of the 'problem' been produced, disseminated and defended? How has it been (or could it be) questioned, disrupted and replaced?*

The seventh step is a later innovation introduced by Bacchi, whereby she extends (or perhaps, completes) the examination of the policy by turning the lens on the analyst, who is an integral part of the meaning-making continuum. The subjective positionality of the researcher is thus integrated into the analytical process as an ethical act. The seventh step requires that the researcher self-problematise her own position, by applying the six questions to the way she engages with the matter at hand (Bacchi, 2017; 2021).

The WPR process is described in further detail in Chapter 4 of this thesis where I outline the methodology used in my research process.

### **Themed concepts**

The following section focuses on key concepts that are relevant to my study.

#### *Democracy as a practice of politics and governance, in general and in South Africa*

To examine the implications of the findings of the WPR analysis for democracy in South Africa, I draw on the way in which democracy is represented in the South African Constitution, but also reference current theories that see democracy as both procedural - defined by systems of governance premised on free and fair elections - and substantive - referencing equality, human rights and freedom (Dalton, Shin, & Jou, 2007).

Consideration of how democracy has evolved in South Africa in the years after 1994 assists in building a deepening perspective on the potential implications of the compulsory History proposal for “our fragile democracy” (Harvey, 2021, para. 1). While we do have a democracy technically, outlined in detail in our Constitution and legislated into the highest law of the land, the implementation of this democracy cannot be assumed to have been at all complete (Melber, 2003; Swilling, 2017). It has been challenged in multiple instances, from poor delivery of basic services to uncontrolled looting of state coffers by people who remain in their government posts to schools that have no sanitation, to the recent unrest in July 2021 that left South Africa reeling in confusion and fear.

The Constitution of South Africa sets out a dream that has its roots in the Freedom Charter, developed during the powerful passion of the 1950’s resistance movement, driven as it was by the gross experience of and outrage against disenfranchisement, inequality, exploitation and violation of basic human rights (DOE, 2005; Levy, 2011). The Freedom Charter was the popular expression of a moral democratic aspiration (Roberts, 2020). The Constitution, refined and ratified in 1996, gave legal force to its predecessor. The complex process of translating the words of this world-famous Constitution of South Africa into action has had a difficult passage, increasingly so in the past fifteen or so years. It is in this passage that a series of contradictions have emerged, bringing into sharp focus the power struggle between the emergent political interests of the post-Apartheid government, especially in the Zuma years, and the interests of “the people” in whose name the struggle was fought and won (Swilling, 2017). However, it is not only the failure of leadership that has compromised our democracy, but also the profound legacy from which it emerged. Entrenched inequality exacerbated further by institutionalised racial discrimination in an unsophisticated and split political economy was the “prize” handed to the “Rainbow democracy” of 1994.

In reality, what we have in the 2020s is a highly contested democracy (Endoh, 2014; Francis, Valodia & Webster, 2020; Webster & Adler, 1999), where even the independent judiciary, mandated to enforce the Constitution as the highest law of the land and a key pillar to the effective custodianship of democracy, is not always able to ensure what the lofty promises of the Constitution offer. As noted by Endoh,

*The greatest challenge facing the contemporary South African society and its arguably promising constitutional democracy is that of securing greater levels of equality, socioeconomic and political justice amongst its citizens, especially the majority. Approximately 20 years subsequent to the end of the apartheid system of racial injustices, the majority in contemporary South African society still remain excluded from the beneficial mainstream and the bill of rights expressed in the interim constitution (2015, p. 67).*

It is in this context that I place my thesis: that all policy should be examined, continuously, to check whether or not it supports the democracy project of South Africa, disregards it or actively undermines it. So much the better if this vigilance can take place before policy becomes formulated into legislation. The old adage that form follows function can act as a cautionary. What is the function that policy in general, and the DBE proposal to make History compulsory in particular, is supposed to perform? How does the proposed or actual policy represent problems that they seek to manage? Are the policy makers focussing their attention on building the resilience of our particular version of democracy, in our particular context that has come out of our particular history?

#### What is democracy?

A democracy is largely assumed to be a political form. It includes “an emphasis on freedom and liberty as its essential goals, with the institutions of democracy a way to achieve these goals” (Dalton, Shin & Jou, 2007, p. 3). It speaks to how governance of societies can happen, in which a representative government acts specifically to represent the will of the society. From the Greek term, *demos* referring to the people, “and *kratein* meaning ‘to rule’. Hence, *demokratia*, ‘democracy’, means ‘rule by the people’” (Harrison & Boyd, 2018, p. 1), it emerged at a time when power by lineage was being challenged, and replaced with the notion that, to be fair, decision-making should be made collectively by those affected by the decision. Put another way, “Democracy is essentially the idea that political sovereignty resides at the level of the individual. In this sense, a political community derives its supreme power and authority from the consent of the people within that community” (Steinmetz, n.d. p. 1).

The popular and highly simplistic definition of democracy presented by Abraham Lincoln at Gettysburg when he spoke of a “government of the people, by the people, for the people” (Ter Haar, 2018, p. 1)

holds within in its short simple statement all the aspirations of how democratic governance should happen. In Ancient Greece, where the concept was first written about, governance happened by the consensus of the citizens (excluding women and slaves), who gathered together in their numbers to discuss, debate and decide. This was described as direct democracy. In larger more complex societies, this is deemed too unwieldy, and so representative democracy evolved (Ter Haar, 2018). In its early formulations, democracy stood in contradistinction to monarchy (rule by one) and aristocracy (rule by a few) where it implied rule by many (Harrison and Boyd, 2018).

Democracy has become a highly contested concept, and has been interpreted differently in almost every context in which it has been applied (Doughty, 2014; Fraser, 2019; Merkel, 2014). It is the subject of extensive scholarly debate precisely because of how power fits into it. Who holds the power? Where is the power located? How exactly can the exercise be limited and controlled, and by whom, and how often is often enough? Can a capitalist system and a democracy really cohabit the same space? (Fraser, 2019; Merkel, 2014).

Democracy is an ideology and a practice. Dalton, Shin & Jou published a study in 2007, entitled *Popular Conceptions of the Meaning of Democracy: Democratic Understanding in Unlikely Places*, in which they aggregate a wide range of definitions of democracy. A significant number of these definitions have to do with the procedures of government, i.e. the electoral process, as the means to achieve various forms of freedoms and human rights. The role of government in a democracy is therefore to constitute, institute and act as custodian of the democratic experience. The interpretation of what this entails and how it must happen is defined by the socio-economic and political forces that are dominant in the society.

Representative democracy allows for the case where people choose other people to manage the affairs that will serve the interests of those same people. According to Harrison and Boyd (2018), embedded in this arrangement are two primary agents – the *demos*, all the people, and the few people that all the people have chosen to manage the affairs of the society. Also embedded in this notion is the pact that exists between all the people and their chosen representative custodians. By this pact the rules of democratic governance are defined, understood and agreed on. By extension, there is a tacit agreement that the representatives will abide by the pact, and that the people will make sure that this happens (Dalton, Shin & Jou, 2007; Harrison and Boyd, 2018; Munck, 2014). Thus a huge degree of trust becomes the glue that protects the arrangement. This glue is made up of a clear sense of responsibility and accountability. The assumption is that both agents are active in their respective roles. Both have rights and responsibilities to maintain the integrity of the pact. They can only achieve this balance if both parties are diligent in their duties and endlessly alert in their monitoring of the other. Unavoidably,

in a modern, highly complex society with large populations and competing interests, this relationship between the people and their government in a democracy becomes extremely vulnerable. Increasingly, governments in modern democracies assume the right to think for the people, and to reduce the opportunity for mandatory accountability in a plethora of ways such as centralising authority and responsibility and creating multiple tiers of government that effectively separate the people from their representatives (DIFD, n.d.). This is done under the guise of efficiency and convenience. In most situations, the people are complicit to this arrangement, so busy are they with their day-to-day lives. Thus most democracies, South Africa's included, are effectively run by political elites, who take decisions on behalf of the citizenry (Carr, 1998). This scenario places a huge burden of responsibility and ethicality on this political elite. It also provides the perfect storm for corruption and abuse of power. Scherz (2013) says, "The legitimacy of the *demos* is highly relevant to democratic theory as a self-referential theory in which political power is legitimised in reference to the individuals over whom it is exercised" (p. 1). This, she says, is important to protect both the process of democracy and the people that it aims to support.

*The legitimacy of claims made in the name of the people depends not only on the decision-making process, but also on the subject making the decision. So if the legitimacy of the demos is questionable, the legitimacy of democratic decision-making is also undermined (p. 1).*

This insight alerts us to the importance of continuously examining the reciprocal relationship between the people and the decision-makers, the policy-makers, and to be aware of how power is enacted within this relationship. Democracy in this instance is a practice, a procedure, and a process (Scherz, 2010). Policies become the mechanism of this enactment. Policy-makers are the primary actors, all-powerful. One way to keep an eye on the enactment of control in a democracy is to subject it to analysis, through some form of critical discourse analysis. Carol Bacchi references Foucault when she speaks of practices being "places" where "what is said and what is done, rules imposed and reasons given, the planned and the taken for granted meet and interconnect" (2019, para. 9).

Despite the contention and the variation of democratic forms of governance, there are a number of key assumptions that are built into democracy, about which there is reasonable consensus: It relates to a form of government where there is majority rule, with protection of minority interests based on frequent free and fair elections (Dalton, Shin & Jou, 2017). It is committed to freedom – socio-cultural, political and economic, and legal, although there are variations on how these are defined and delimited (DIFD, n.d.; Fraser, 2019; Munck, 2019). It is committed to protection of human rights and protection from abuse - socio-cultural, political and economic (Francis, Valodia, & Webster, 2020; Gumede, 2017; Harrison & Boyd, 2018; Scherz, 2013). It is premised upon consultation and consensus, transparency

and accountability, although again, there are variations on how these are defined and delimited (Dalton, Shin & Jou, 2017; Gumede, 2017; Harrison & Boyd, 2018; Munck, 2019). It assumes the rule of law (DIFD, n.d; Harrison & Boyd, 2018).

The above common features of democracies are what have been embraced by those that gave us the New South Africa, the Rainbow Nation, and have been compromised increasingly over the past one and a half decades

#### What about our particular democracy in South Africa?

South Africa is a representative democracy governed by a constitution (Endoh, 2015). A fundamental set of aspirations and values characterised the struggle for freedom in South Africa likely since the first signs of resistance against external domination of one form or another, all yearning towards democracy-in-practice (Gumede, 2017; Swilling, 2017). Certainly since the events that led up to the formation of the African National Congress (ANC) and subsequent organised resistance, the articulated struggle for democracy has been expressed through the values of basic human rights such as freedom from persecution of any kind; social, political and economic equality; freedom of belief, speech, association, movement; the right to protection from hunger, homelessness, and violation of any kind; the right to education and safety. At various times, the liberation struggle has been more or less influenced by socialism (Mosala, Venter & Bain, 2019). The Tripartite Alliance that came together to give the ANC its convincing win held the vision of a future based on equality and opportunity, a discourse of redress from a past characterised by deprivation and abuse on every level – economic, political and social. Central to this was a socialist economic agenda that needed to be applied to a complex and fractured but free-market political economy. Mosala quoting Terblanche described the situation as follows, “When, in 1994, a democratically elected government came to power, it inherited a contradictory legacy: the most developed economy in Africa on the one hand and major socio-economic problems on the other” (2017, p. 328). He may have added that there were parallel economies – one highly developed, the other highly underdeveloped.

The public expectation, especially from over 35 million South Africans (NDA, 2017, p. 1) who had been economically excluded for generations were, and remain, massive. The almost impossible challenges were bound to challenge even the most committed new set of governors, with their talk of political and economic freedom. Despite the challenges, the Mandela government set about crafting our democracy by way of the Constitution.

The South African Constitution “has been called the “birth certificate” of a free and democratic South Africa” (Department of Justice and Constitutional Development, n.d. p. 1). The Constitution

encapsulates both the aspirational aspects of democracy – the values - as well as the legal formulations – the norms and standards - to protect these aspirations. It is in the preamble to the Constitution that the South African democracy is clearly encapsulated (SAGb, 1996, para. 1):

*We, the people of South Africa, Recognise the injustices of our past;*

*Honour those who suffered for justice and freedom in our land;*

*Respect those who have worked to build and develop our country; and*

*Believe that South Africa belongs to all who live in it, united in our diversity.*

*We therefore, through our freely elected representatives, adopt this Constitution as the supreme law of the Republic so as to -*

*Heal the divisions of the past and establish a society based on democratic values, social justice and fundamental human rights;*

*Lay the foundations for a democratic and open society in which government is based on the will of the people and every citizen is equally protected by law;*

*Improve the quality of life of all citizens and free the potential of each person; and*

*Build a united and democratic South Africa able to take its rightful place as a sovereign state in the family of nations.*

Each of the fourteen chapters of the Constitution addresses a particular aspect of what was to become the highest law of the land, each of which specifies and protects those rights that guarantee democracy, and which address inequities of the dictatorship of the Apartheid state. It is worth identifying these chapters to underscore the relationship between the Constitution of South Africa and the ANC's conception of democracy.

Chapter 1 specifies the Constitution as the supreme law of the land, and outlines the Founding provisions, upon which the constitution is premised. The sovereignty and democratic nature of the government is identified, underpinned by named values of:

- *Human dignity, the achievement of equality and the advancement of human rights and freedoms.*
- *Non-racialism and non-sexism.*
- *Supremacy of the constitution and the rule of law.*



- *Universal adult suffrage, a national common voters' roll, regular elections and a multi-party system of democratic government, to ensure accountability, responsiveness and openness* (SAGc, 1996, para. 1).

Chapter 2 spells out the details of the Bill of Rights, according citizens full protection of their human rights in all spheres, drawing closely from the Universal Declaration of Human Rights. It addresses the right to freedom from exploitation and abuse in all forms; the right to freedom of belief, expression, movement, association; the right to basic services of food, shelter, education, safety, health, justice, employment, fair labour practice; the right to a clean and protected environment; and others.

Chapters 3 – 7 describe how government will work from a national to local level. Chapter 8 addresses the Courts and Administration of Justice. Chapter 9 and 10 identify state institutions specifically designed to protect the constitutional democracy from abuse, over and above the structuring of the mutually regulatory three primary arms of government; and how public administration will work and be regulated. Chapter 11 addresses the roles, responsibilities and limitations on Security Services. Chapter 12 acknowledges the historical legacy of Traditional Leadership that remains important to many South Africans, affording the existence of a mechanism that is essentially anomalous to traditional non-lineage-based power systems. Chapter 13 specifies and regulates how the national fiscus will be managed for the public good. Chapter 14 speaks to a number of additional General Provisions, including international relations, self-determination, and other matters as do arise but do not fall into the other categories.

Although there will be commonalities between the democratic character and the rules of governance in South Africa, and those of many different democracies around the world, what is notable is the direct link between what South Africa did *not* experience before 1994 and what the *demos* demanded of the “democratic revolution” of 1994. This is what is represented in the Constitution and the document has world-wide recognition for being extremely detailed in its protection of democratic rights and freedoms. However, since the glory days of the Mandela decade, South Africa’s democracy has lost its gloss.

#### What has happened to our democracy in South Africa?

Despite the Constitution, we do not live in a fully-fledged democracy. We do not live in a racialised dictatorship, but we live in a country with no economic equality and an extremely high Gini coefficient, where race still largely describes who is privileged and who is not, broadly. Literally, millions of South Africans live below the poverty line. The quality of education, housing, healthcare and justice depends on the depth of one’s pocket. Racism is rife. The land is still not equitably shared “amongst all who live on it”. Power and privilege have been captured by a new political elite (DFID, n.d.). In their report

*Betrayal of the promise: how South Africa is being stolen*, Swilling *et al* conclude that there was a “Systematic repurposing of state institutions in accordance with a political project mounted by the Zuma-centred power elite” (p. 61). They continue their charge, that intentional appropriation of power to loot the state purse for the benefit of a small group, who aim,

*... to consolidate political power and to ensure the long-term survival of the rent-seeking system that has been built by this power elite over the past decade. To this end a symbiotic relationship between the constitutional state and the shadow state has been built and consolidated* (p. 61).

Their point is basically that the so-named “Zuma-centred power elite” have hijacked the policies behind the National Development Plan (NDP) and the Radical Economic Transformation (RET) programme, and re-purposed these for self-serving material gain, all the while convincing the public with ideological rhetoric. The public relations work done by the notoriously exposed Bell Pottinger fiasco being a gross example of this double-speak. Since this report, a number of other exposes have been published, more or less saying the same thing.

The Zondo Commission has likewise revealed tale after tale of maladministration, blatant theft of billions of Rands and corruption, lies and dereliction of duty as well as further gross compromising of sound democratic governance at all levels of government. In mid-2020, the Auditor General released his report, summarised in the Mail & Guardian as follows, “With only 21 [out of 278] municipalities achieving a clean audit, more than R1-billion spent on consultants and over R32-billion in irregular expenditure, the auditor general’s report this week unveiled the extent of the meltdown of South Africa’s municipalities” (2020, para. 1). With this 7.6% failure score, it is little wonder that the South African public has in the last decade taken to the streets in protest.

While democracy is an ideological construct based on a commitment to freedom, equality, human rights and respect, the administration of governance in such a system requires the political will of the people’s representatives and the expertise to get it right. In the case of South Africa, a practice of cadre deployment<sup>5</sup> and jobs-for-friends has severely undermined service delivery at all levels of government since 1994 (Maja, 2020). More than two and a half decades of this has eroded governance practice to a critical point.

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<sup>5</sup> This term is simply explained by journalist Kgotso Maja, “Defined in the simplest terms, cadre deployment refers to a process through which political parties in a democracy give effect to their policies and objectives by preferring functionaries who subscribe to the same values. In South Africa, there is a tendency of associating this practice with only the African National Congress” (2020, para. 4)

So far there is little confidence in the democratic dream of the Constitution – the gross shortcomings sadly compound the problem by undermining the significant gains that have been achieved since 1994. It is hard not to wonder how much more could have easily been achieved without the maladministration, poor management and wholesale theft of the people's taxes and dreams.

Kubow tells us, "A study of South Africa's democratic transition, however, reveals that democracy's conceptualization is embedded in a host of sociocultural, economic, and political conditions that have shaped citizen identity and nation-building in particular ways" (2009, p. 43). The discourse about democracy embedded in the South African Constitution expresses the discourse of the liberation struggle. The practice of this discourse has led us into a conflicted terrain characterised by the disjuncture between the democracy of the Constitution and the diminishment of real democracy of actual governance. Public response to this failure to deliver has increased over the years, evidenced by service delivery protests, student uprisings, racialised violence, increased crime and other public expressions of dissatisfaction. In government-speak this is described as a lack of social cohesion and national pride and xenophobia.

#### *The relationship between citizenship, identity and nation-building (and democracy)*

These concepts are tangled in a complex web of DNA. They describe the relationship between individuals and society, and society and governance, both psycho-culturally and politically.

#### Citizenship, Identity and Belonging

Citizenship refers to the relationship between citizens and the state in a multi-layered web of rights, responsibilities and duties (Council of Europe, 1996). It follows that citizenship also defines the relationship between members of a community tied together by defined criteria, often related to legal political boundaries, or territorial boundaries. To be a citizen of nation state assumes that one is both protected by the rights that govern the state, and one has obligations in relation to that state. This legalistic interpretation is plain. It is even enshrined as a basic human right (as in chapter 2 of the South African Constitution). What is less plain is what exactly citizenship means to the average citizen beyond what is in the statute books, and more importantly, how to promote citizenship in a way that promotes democracy.

Since 1994, the active role of education in the building of democracy in South Africa has been a stated intention, even described as a "civic mission" (Schoeman, 2006, p. 1). This was no different under the National Party (NP) regime, only they had a much clearer idea just how to use education in their nation-building project, as formulated in their policies of Christian National Education and Bantu Education.

The literature on citizenship is fraught with debate, and at the heart of this debate are a few key issues: what exactly constitutes citizenship? What is its relationship to identity and belonging, especially in a more fluid and mobile world? What kind of citizenship is instituted for what purpose, or agenda? What is the responsibility of citizens in the action of citizenship? What is the responsibility of the state? At one end of the spectrum we have what some call indoctrination (what the Apartheid or Nazi regimes did with their respective youth preparedness programmes), or less extreme, what Sicakkan (2005) calls civic nationalism where the objective is to build loyalty to the state. At the other is what Seroto (2012) calls critical citizenship, or what Hobden (2021) calls participatory citizenship, where the aim is to foster public participation in building democracy, for the benefit of all. This then, brings the notion of citizenship closer to the notion of democracy.

The questions to address become: what is citizenship? What is identity? How are these concepts interrelated and how do they intersect with democracy, which means exactly what? Examining these key questions allows us to have a clearer insight into what the DBE understands by these concepts, and how they have built their practice around their determinations and agendas.

This conundrum about citizenship and its relationship to nation-building lies at the heart of how History as a subject is being reimagined by the DBE, and so far, the plan is to use History for citizenship and nation-building by making it compulsory at FET level. Using education for this purpose is not new anywhere, and certainly not in South Africa. What is challenging the authorities is how to do it. So far, it seems that there is no clear and shared understanding of what citizenship actually is, what exactly the aim is of promoting this notion, and how it can best be done.

In the forward of current CAPS guidelines for all subjects signed by Minister Motshekga in 2011, it is noted that education has been transformed completely from its Apartheid predecessor, and is now explicitly aligned to the values and objectives of democracy as described in the Constitution. The DBE states, “Education and the curriculum have an important role to play in realising these aims.” (p. iii) In describing the general aims of the curriculum, the guidelines refer to “Equipping learners ... with the knowledge, skills and values necessary for self-fulfilment, and meaningful participation in society as citizens of a free country.” (p. 5)

In the Life Orientation syllabus for FET, one of the focus areas of the Grade 12 curriculum is “Responsible citizenship”, which includes “Evaluating own position when dealing with discrimination and human rights violations, taking into account the Bill of Rights: participation in discussions, projects, campaigns and events which address discrimination and human rights violations” (DBE, 2011 p. 22). In the current CAPS guideline for FET level History (2011), it is taken a step further, and expressly

stated that one of the purposes of the discipline of History is to support “citizenship within a democracy” by:

- *Upholding the values of the South African Constitution and helping people to understand those values;*
  - *reflecting the perspectives of a broad social spectrum so that race, class, gender and the voices of ordinary people are represented;*
  - *encouraging civic responsibility and responsible leadership, including raising current social and environmental concerns;*
  - *promoting human rights and peace by challenging prejudices that involve race, class, gender, ethnicity and xenophobia; and*
  - *preparing young people for local, regional, national, continental and global responsibility.*
- (p. 13)

If citizenship is an active, rights-based status *and* practice, which is aligned to how citizens identify themselves and relate to their fellow citizens and their legal representatives tasked with governance, then it follows that building a resilient democracy depends on promoting active citizenship. Logically, this must be a condition of democracy. It follows also that the building a sense of identity is part of this equation, but this is much more complex than it seems. It raises the questions as to how to *do* citizenship, and how to *do* nation-building and social cohesion in a country like South Africa where there is such a long, deep and profound experience of disconnection, and multiple identities based on the legacy of Apartheid, which still defines, where people live, who they spend time with, what language they speak, what they eat, who they go to school with, what jobs they get and very often who they vote for. The challenge is to decipher the difference between citizenship (and identity building) for democracy not for nationalist interests.

According to the Consultation Meeting for the Education for Democratic Citizenship Programme of the Council of Europe (COE), held in 1996. “Citizenship is a complex and multi-dimensional reality which needs to be set in its political and historical context ... Democratic citizenship, specifically, refers to the active participation by individuals in the system of rights and responsibilities” (p. 1). The same organisation developed the four dimensions of citizenship<sup>6</sup>: the political, social, cultural and economic. Each dimension describes an aspect of human, or civic, life. Depending on the nature of the state, the relationship within each of these dimensions will differ. Therefore context is key to what citizenship

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<sup>6</sup> This has been adopted by the United Nations in the citizenship education programmes.

means. The citizen of a dictatorship has a vastly different relationship with the state than does the citizen of a democracy. Even within these political forms, there will be differences.

One thing is common in the literature on citizenship: it is always linked to “identity politics and modes of belonging” (Sicakkan, 2005, p. 219), however, this is being challenged by a new world order of high mobility, migration, and even technological advances that foster much greater global fluidity. In such a world the way one constructs one’s identity is less clear cut.

A further tension is created by the notion that it may not in fact be possible to achieve real participatory citizenship in the post-modern capitalist political economy, where social inequalities persist despite the rhetoric and even legislation of neoliberal democracies. It is accepted that citizenship brings with it equal access rights to the benefits of the state, but what if different groups are prevented from making use of that access for reasons of deficit? Purvis and Hunt comment, “The category of ‘citizen’, long considered to apply equally to all members of a political society, now strains under the burden of difference,” (1999, p. 476) in the highly heterogeneous society of the modern state, with its proliferation of multiple identities. The challenge then is to understand the tension between citizenship, democracy, identity, power, inclusion, exclusion and the state.

Seroto (2012) references Staeheli and Hammett who contend that citizenship should not just be seen as status constructed to reflect universal ideals, but it should also be seen in relation to political, economic and social processes that operate within particular temporal and geographical contexts.

Lister (1998) speaks of citizenship as being contested on several levels including that which finds the concept caught between what she refers to as the status, or individual rights aspect, and the practice, or individual obligations to the community, where the former is passive and the latter active. Historically, Lister explains, the former is linked to the liberal notion of human rights, while the latter encompasses a republican definition. She notes that although these positions are sometimes seen (and enacted) as mutually exclusive, depending on the context, there is the opportunity to align them. In this way, the right of citizens to not only enjoy the protection of defined human rights and benefits, but also to become involved, to participate, in civic life are actioned. In this way agency becomes a key part of citizenship. This view shines a light on who expresses participatory citizenship, and who does not, and why. Thus marginalised groups may be denied full citizenship through having limited agency, or there is the option to challenge that. Citizenship can be inclusive, where citizens are embraced as part of the civic state, part of the group, by expanding the definition of belonging broadly. It can be exclusive, where belonging is contested by multiple identities – culture, gender, class or other social constructs. In practice, this inclusion-exclusion continuum can be implicit or explicit.

Hakan Sicakkan (2005) writes about the dominant paradigms of citizenship, claiming that they share two main elements, both connected to “the notions of belonging modes and identity politics” (p. 199). He describes the first element of citizenship as the “ethics of establishedness” (p. 199) by which most people seek as “the best mode of being” to live in an established home, in a neighbourhood, in a state. The other element relates to how people appear to feel the need to identify with each other, in groups or communities based on “ethics of uniformity” (p. 199). Sicakkan goes on to note that depending on an ideological interpretation, various positions will slightly redefine what it means to be part of the group, perhaps by virtue of occupation, or investment or various cultural ties. The “ethics of establishedness” and of “uniformity” therefore attach people to a place, as a primary aspect of belonging (even nationality) and of citizenship. This translates easily into legal citizenship and its associated benefits of voting, welfare, education, banking and the like, where having a fixed abode is often the requirement for legal access.

In addition to place, Sicakkan introduces the aspect of time as a key determinant of identity politics and citizenship, especially the past, or history, and more especially, the more recent past. He notes that for nationalists, identity related to history is of high significance. Within this framework, power is often a key determinant as to what exactly is used as the defining criteria for identification. Depending on different circumstances, it could be territorial, or religious, or ethnic or some other feature that best serves the dominant driver of identification (such as the powerful elite, governments, or warlords). Sicakkan refers to Benedict Anderson’s research which reveals that sometimes the past renditions are imaginary more than real, fabricated to create the illusion of belongingness for specific political purposes.

Rehman (2008) references a number of theorists who posit that the power of creating a narrative of “us and them” as an extremely powerful technique to build both identity and contribute to unequal identity differentials. The Apartheid government successfully worked this to huge gain using ethnic determinations based on a selective rendition of the past (Auerbach, 1964; Christie & Collins, 1982; Cross, 1994; Hofmeyr, 1982; Rehman, 2008; Van Heyningen, 1960). This is picked up in the HMTT full report where they discuss in extensive detail the role of nationalism and how it is described in the CAPS History curriculum, and how it should be presented to build a sense of belonging to a nation (nation-building).

The so-called republican “mode of belonging and identity politics” (Sikkakan, 2005, p. 206) seeks to build alliances across typical social, economic or cultural divides for the purposes of building allegiance to the “republic”, often focused on the future rather than the past. Lister (1998) sees this group as aligning citizenship with patriotism, as a form of identity politics.

Sicakkan (2005) also draws attention to the liberal view of citizenship, which is essentially present-focussed, and associated with a political determination. He says, the "... liberals' favourite identity politics is the politics of integration of individuals as they are into the political culture of liberal civil society" (p. 207). The limitation of this view according to Sicakkan, is that it belies the fact that there are people in any state that do aspire to either the nationalist or republican politics of identity, and they cannot just be wished away.

It may be, is even likely, that the undefined concept of citizenship used loosely by the DBE in its rhetoric and in its liberation discourse and even in the CAPS guidelines, is a combination of the nationalist, republican and liberal definitions as described by Sicakkan, Lister and others. These theorists actually suggest that the likelihood is that strategies for building citizenship would benefit from acknowledging all forms of identity politics as there are likely citizens that represent each grouping in any state, and all of these tendencies need to be addressed in a coherent effort to build stability. In addition to this, the more a place (like South Africa) is undermined by socio-economic and political instability, the more citizens are vulnerable to the mobilisation by various forces for various ends, who use concepts like identity, citizenship and nation-building as emotive rallying cries. This we have seen multiple times inside and outside of Parliament in South Africa. Julius Malema, for example, uses this kind of unspecified rhetoric liberally to rouse emotions in a highly racialised context. Those pushing for anti-foreigner agendas, such as the Put South Africa First<sup>7</sup> movement, and more recently the Operation Dudula movement<sup>8</sup>, are others.

A further overlay that assists in understanding the complexity of identity politics and citizenship identifies what Sicakkan (2005) calls psychic mobility, by which people identify with an idea, which may have the effect of locating them in time and place. This could be a religious trigger – he uses the example of reading the bible or the quran - or language, or traditional practices, or even engaging the internet.

With these insights into different interpretations and aspects of citizenship, combined with identity and sense of belonging, the question remains how to reconcile them in a way that provides the clearest picture. Sicakkan (2005) suggests drawing from all of them, acknowledging that context is key and it is tied to what he refers to as "*demos*", or people in a place, as well as from the focus on either the

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<sup>7</sup> See the article "South Africa: Hatred of migrants reaches new heights" in <https://www.dw.com/en/south-africa-hatred-of-migrants-reaches-new-heights/a-55093941>

<sup>8</sup> See the article <https://www.dailymaverick.co.za/article/2022-02-21-xenophobia-accused-operation-dudula-returns-to-hillbrow/>



community or the individual, and that sometimes new identities that are “ahistorical” must be factored in. How these two factors play out in understanding specific contexts depends on local dynamics.

Citizenship, identity, belonging, even nation-building are concepts closely tied to the notion of democracy (just as they are to other concepts of socio-political organisation, such as nationalism). Sicakkan (2005) and Hobden (2021) usefully weave the thread of *demos* (the people) into the discussion about citizenship, precisely for this reason. The definition assumes the existence of the state structure, or formulation, and the people that live within that state. From this definition of “the people” we can link the definition of democracy, as discussed earlier in detail.

South Africa is a declared democracy. The preamble to the Constitution of 1996 states this upfront and explicitly. It identifies the state and the citizen as the two key players in its definition of democracy, where the latter is both beneficiary and agent of fair governance. To safeguard this relationship between the state and the citizen in a democracy, the state pledges to act through the various institutions of governance in ways to protect and advance the citizens of the democracy. The citizens are expected to play their part through being active citizens, practicing citizenship. However what this actually means, other than periodic voting, and how citizens *do* citizenship is not clear, or at the least means different things to different people.

Taking the notion of citizenship further is not only understanding how it is constructed as a notion, but what it means in practice, including what exactly can be expected of citizens. What are their obligations in the *quid pro quo* relationship that derives from their rights? In a way, this issue is the interface between thinking about citizenship and actually doing it, whether as a citizen, or as agencies within the state promoting it. It links into citizenship education, for example.

The danger is that we may land up with is what Sicakkan (2005) calls “civic nationalism ... loyal to the “instrumental” dimensions of the state,” (p. 220). On the other hand, a deeper understanding of citizenship that combines status and practice as suggested by Lister’s (1998), and Seroto’s (2012) “critical citizenship”, or Hobden’s “participatory citizenship”, that incorporates a closer relationship between citizens and the state, through active participation by the former, in ways that also result in a productive and mutually beneficial outcome for both parties. This kind of citizenship requires knowledge and skills, which must be learned somewhere, such as in schools.

How people act in society is socialised – in families, in communities, in schools and other institutions of society. Bronfenbrenner’s bioecological systems theory of development helps us to think through the bidirectional relationship of influence between individuals and society (Bronfenbrenner & Morris, 2006). Revisions of this model have added time, and history as well as cultural overlays (Oppenheimer

& Soto, 2017). This model illustrates how the context in which people live plays a powerful role in how individuals and groups develop, and social institutions such as schools contribute to the replication of values and norms. It is not surprising that schools are seen as an important agent of citizenship building.

During the Apartheid years, citizenship education was a cornerstone of the Christian National Education project, itself a cornerstone of establishing National Party and Afrikaner hegemony based on the broad policy of Separate Development. Bluntly, they used a specific kind of citizenship education to ensure support. Their citizenship education was clearly articulated through a detailed programme of implementing a purposed narrative in their History and other classroom subjects that explicitly pushed a beguiling view of a “chosen race”, with a God-given mission to rule through the policy of Apartheid (Auerbach, 1964; Christie & Collins, 1982; Hofmeyer, 1982). Backing this narrative was the militarisation of White schools that delivered “civics”- a cadet programme for boys, and a first aid “keep-the-home-fires-burning” programme for girls. This citizenship education was also underpinned by building a collective psyche of fear through a discourse that developed a threat from the communist “terrorists”. It was the duty of the ‘*volk*’ to protect the (White) nation from the Russian Scourge. It worked well for the NP, and enabled them to maintain power for 46 years.

The same challenge faces the post-Apartheid government: they have identified the need for the kind of citizenship education that assists to build “social cohesion and national pride” (Motshekga, 2014). Just as the NP saw schools as central to citizenship education, so the ANC government has identified this same site of engagement (as described in the CAPS guidelines, 2011). It appears in all the main education policy documents but so far, it has clearly not yielded the results that the government hoped for. Smith & Arendse (2016) posit that the reason it has failed is due to the lack of time allocated to learn enough information about the relevant concepts (democracy, participatory citizenship, human rights) and to enact practical forms of active citizenship so as to learn how it may look like in “real life”. The recommendations made by these researchers relate directly to these findings, but also include the need for an attitudinal change or “paradigm shift” at a departmental level to ensure that the citizenship curriculum is actually seen as important and implemented. As noted earlier, Motshekga is explicit in admitting that the failure of the citizenship education programme as located within Life Orientation is a key objective behind making History a compulsory school subject. The assumption being that it would be more successful if it was encompassed within History. The challenge now for the DBE (and likely for History teachers, and teachers of History teachers) is what kind of citizenship they are really talking about, and how they will achieve what Motshekga wants in approximately one hour per week.

In his analysis of this form of critical citizenship education that aligns to what the DBE claims as their objective, Johannes Seroto (2012) places critical thinking at the centre. Critical thinking as a concept is

noted by the DBE in the CAPS guidelines (2011) as a cornerstone of what education should build, and it appears again in their discourse about the proposed compulsory History curriculum in Motshekga's speech and in the HMTT report. However, like citizenship, the notion of critical thinking means different things to different people.

Seroto (2012) speaks of critical thinking as "a form of critical social practice" (p. 64). He aligns his argument with those who see critical citizenship education as resulting in a situation where,

*Students can challenge taken-for-granted meanings and suppositions, questioning how knowledge is constructed and used. They can also interrogate issues of power, justice, identity and the ways content and practices are shaped by different ideologies (p. 64).*

In this way, critical thinking becomes as an act of critical citizenship in a participatory democracy. The response of the ANC government to the various challenges emanating from the education sector, such as the #feesmustfall and decolonisation movements have not demonstrated that the government welcomes challenge to power that comes from learners and students. So when Minister Motshekga speaks of critical thinking and citizenship for democracy, she needs to consider that it may result in an increase in citizens speaking truth to power.

The lack of social cohesion in South Africa remains a stark reality which expresses itself in multiple ways: we remain a highly racialised society in reality. The fact that wealth is still largely concentrated in the hands of White men or that residential areas are still largely racially defined are cases in point. Or that older private schools still have mainly White staff and learners, and that there are probably no White learners at any of the state schools in uMlazi. Or the fact that most supporters of the Democratic Alliance are White English-speaking South Africans. Or that disempowered economically excluded South Africans turn on their immigrant neighbours accusing them of stealing their jobs. This legacy of Apartheid (both in respect of racial profiling and economic exclusion) will take a great deal of clever citizenship building to overcome. Can this be done in an hour a week in the high schools of the land? Not likely.

### Nation-building

Another concept woven into this discussion and this discourse is nation-building. The concept is used by Minister Motshekga in her explanations as to why History should be made compulsory and it is discussed at length in the HMTT report. It has been and still is used extensively by the government of South Africa to preface policy. It is the refrain of most politicians across the party spectrum. It is mentioned in the same breath as citizenship and social cohesion. As a constant refrain, it naturally derives its relevance in recognition of our divided past, as the undeniable legacy of Apartheid, and as

an inescapable task facing the post-Apartheid government; or any post-conflict attempt at reconstructing a democratic society. The discourse around this term is even less clear-cut than that of citizenship and identity, and is closely tied to the context within which it is used. It is also tied to other key concepts, including “the nation, national identity, nation-state, and nationalism” (Mylonas, 2020, para. 2). All of these terms are contested by what the starting point is of the analysis and exactly what the definition aims to elucidate.

According to the Oxford Reference, Benedict Anderson describes the nation as “an imagined political community - and imagined as both inherently limited and sovereign” (2021, para. 1). In his overview, Mylonas (2020) records the range “from essentialist ones that reify certain characteristics as purely national ones (Herder 2004, Fichte 2008) to more constructivist ones highlighting collective ascription as a key element for the existence of a nation (Renan 1995, Anderson 1983)” (para. 1). What these definitions have in common is that they refer to a group of people living in a generally acknowledged geopolitical space, at a particular time, even if it is in some instances “imagined” and always socially constructed. It is this factor of the nation that poses a challenge for governments in the course of their governance discourse, or planning and practice. Being tied to a geopolitical boundary is a useful containing construct. I live in South Africa with its defined borders. I am a South African. I identify with the geopolitical space. The ANC has jurisdiction over the nation of South Africa. The challenge comes when the notion of nation must be expressed in political terms, for political aims. This brings in the concept of nationalism.

Jackson-Preese and Norris say that nationalism is based on the notion that humanity lives in groups – nations – and that these are mostly organised as,

*Independent sovereign states [and that] the basic problem of nationalism is the difficulty (if not impossibility) in making political facts correspond to the national ideal. As a result, scholarship on nationalism deals with complex issues regarding the nature of identity and belonging, as well as the origins and legitimacy of the international system of nation-states. (2016, p. 1)*

Nationalism assumes Anderson’s notion of imagination, a concept that is built around the nation. Handler defines nationalism as an ideology (1988), where Bruelly (1985) calls it a political doctrine. His view is that nationalism tends to refer to the *exercise* of power over groups in which nationalist arguments are used to build a *political doctrine* based on the existence of a nation with an explicit and peculiar character. He says, “The interests and values of this nation take priority over all other interests and values. The nation must be as independent as possible. [with] at least the attainment of political sovereignty.” (1985, p. 1). Adding Michael Hechter (2001) to the mix, he ties in the act of political governance, describing nationalism as a “...collective action designed to render the boundaries of the

nation congruent with those of its governance unit”. (p. 7). He introduces various types of nationalism, including State-building nationalism that aims to “assimilate or incorporate culturally distinctive territories in a given state” (p. 15); Peripheral nationalism which “occurs when a culturally distinctive territory resists incorporation into an expanding state, or attempts to secede and set up its own government” (p. 17); “Irredentist nationalism occurs with the attempt to extend the existing boundaries of a state” (p. 17); Finally he describes “unification nationalism involves the merger of a politically divided but culturally homogeneous territory into one state” (p. 17). Often used synonymously, Hechter disqualifies patriotism as a form of nationalism on the grounds that it is essentially an external effort at promoting one nation over others.

The key issues of these slightly differing interpretations is that nationalism is a doctrine, based on an identification with a nation, and that a nation is both geographical and socio-political, and imaginary. What it means specifically must be tied to a particular context. Taking this simplified view, the extrapolation into nation-building is relevant.

Nation-building, tied as it is to the idea of the nation and the active campaigning or movement of nationalism, is likewise open to interpretation and is context specific. Mylonas defines it as “... the process through which the boundaries of the modern state and those of the national community become congruent. The desired outcome is to achieve national integration” (2020, para. 1). He usefully describes the different approaches,

*As a structural process intertwined with industrialization, urbanization, social mobilization, etc. (Structural Explanations); as the result of deliberate state policies that aim at the homogenization of a state along the lines of a specific constitutive story—that can and often does change over time and under certain conditions (State-Planned Policies); as the product of top-bottom processes that could originate from forces outside of the boundaries of the relevant state; and as the product of bottom-up processes that do not require any state intervention to come about (Contingency, Events, and Demonstration Effects) (para. 1).*

From these definitions of nation, nationalism and nation-building (and we could bring in others, given that the concept is so contested, and politicised), I am interested to simplify them in relation to what is happening in South Africa circa 2021.

The post-1994 South African government inherited a highly fractured and conflict-ridden “nation”. The challenge was three-fold: Firstly, to implement a democracy where none had ever existed before. Secondly, to institute a process of healing the massive socio-economic, cultural and political rifts that were that had ripped our society apart. Thirdly, to build the legitimacy of the newly elected political

leaders, in a country where to some they were heroes of the liberation struggle and to others (many of whom were captains of industry and owners of the country's economy) they were still terrorists and communists.

The 'democracy project' began with the 1994 general elections, and the institution of the Government of National Unity. It was then was written into law two years later with the carefully crafted, and world-famous, Constitution. The discourse of the constitution is infused with promoting democracy and social cohesion through inclusion, unity, social justice, equality, human rights. It begins, "We, the people of South Africa, believe that South Africa belongs to all who live in it, united in our diversity" (1996, p. 1). It charges the Constitution as the highest law of the land with the task to,

*Heal the divisions of the past and establish a society based on democratic values, social justice and fundamental human rights; Lay the foundations for a democratic and open society in which government is based on the will of the people and every citizen is equally protected by law; Improve the quality of life of all citizens and free the potential of each person; Build a united and democratic South Africa able to take its rightful place as a sovereign state in the family of nations (p. 1).*

The problem implicit in this preamble is the fractured nature of our society - of our nation, our lack of social cohesion (Motshekga, 2014; HMTT, 2018).

Flowing from this difficult beginning was the challenge to carry out a massive nation-building exercise. This was done through infusing the "solution" to the "problem" into all policies governing all aspects of the New South Africa. For example, the National Education Policy Act, 1996 states in its preamble,

*Whereas it is necessary to adopt legislation to facilitate the democratic transformation of the national system of education into one which serves the needs and interests of all the people of South Africa and upholds their fundamental rights (SAG, 1996, p. 1).*

The narrative of the Rainbow Nation, and the iconic stature, nature and tireless campaigning of Nelson Mandela were the flagship marketing tools of this mammoth task.

In reference to the theory about nations, nationalism and nation-building, I suggest that it is the perceived task of the governing party of South Africa to build a compelling narrative around the new nation state of New South Africa. The boundaries did in fact change with the dissolution of the homelands, so the geopolitical boundaries are as we know it, broken into the nine provinces. Politically the nation is the democratic New South Africa. It is both Anderson's "imagined political community" (2021, para. 1), and Handler's references to time and place (2021). The challenge of the government is Hechter's "state building nationalism" (2001, p. 15), described by Jackson-Preese and Norris as the

challenge of building “identity and belonging” (2016, p. 1). To do this, a programme of nation-building becomes salient, all the more difficult in a country like ours which has grown up on multiple and distinct national narratives, serving different power relations. Mylonas described state-planned policies, aimed at “homogenization of a state along the lines of a specific constitutive story” (p. 1). This is no easy task. Education is an obvious site within which to attempt this effort. Children are easier to “mould” (Motshekga, 2014).

As in many countries, education is seen as central to the political imperatives of building the nation. In our case, as Tibbitts and Weldon say, also quoting Kadar Asmal,

*Education was regarded as intrinsic to democracy and the right of citizens, both essential to the realisation of the democratic promise, contributing to the ‘shared values on which nation building will develop and that the fissures and alienation of the past are eradicated’ (Asmal 2000). (2017, pg 449)*

Given the close relationship between identity, citizenship, nation-building and the state, and that these concepts are tied into the story of places and people and how people relate to or identify with “their” place, it is useful to consider how the way we see the past affects how we see ourselves in the present. The subject of History is identified in South Africa as the vehicle to develop citizenship and identity (specifically African identity, according to the HMTT). This is not unique to South Africa and has been and is being done in numbers of countries. There is a move in countries as diverse as the United Kingdom, Brazil and Rwanda where History is being tasked with telling the national story in a way to build national pride (Guyver, 2007; Haydn, 2012).

The links between education and political systems is closer than is often acknowledged.

#### *Education as a mechanism of socialisation*

The purpose of education has been the subject of debate for centuries. The debate is historically bound, and the emphases are as varied as those making them. For the ordinary unemployed mother selling tomatoes on the streets of Soweto, who thinks that education is the only way her daughter won’t take over her “shop”, to the social responsibility officer in Anglo American devising the scholarship programme offering wealth and opportunity to the winning candidates, to the exclusive private school/university marketing department assuring prospective parents that their children will remain part of the “one percenters”: education is a commodity. It gives access to the good life. On the other side, are the “idealists” who speak of critical thinking, creative thinking, education for liberation, education for sustainability and global citizenship. In their rhetoric and their discourse, it is not exactly clear what the DBE thinks currently, or rather, they present a mixed bag of ideas. They speak of the need for

schools to teach “critical thinking” while “moulding” learners to become “the kind of citizens we want” (Motshekga, 2015, para. 10). Trying to locate the controversial compulsory History proposal within this debate, it is useful to dive deeper into the issues around education.

In his article *History in Schools and the Problem of “The Nation”*, Haydn references John Rae, saying,

*It is not a school's task to produce good citizens any more than it is to produce Christian gentlemen. The school does not give people their political ideals or religious faith but the means to discover both for themselves. Above all, it gives them the scepticism to doubt, rather than the inclination to believe.* (p. 284).

This would be excellent if only it were true. However, we know that as institutions of society, schools are important sites of socialisation in which the norms and standards of groups are transferred and replicated through the generations, complementing what happens in homes, and other cultural, socio-economic and political institutions (Bronfenbrenner & Morris, 2006; Holst, 2019; Robson, 2019). Paulo Freire speaks of the dialectical relationship between the individual and society that lies at the heart of learning,

*Consciousness is socially bred....I cannot separate my subjectivity from its social objectivity... [A] theory of education...should neither deny the social nor emphasize only the development of...individual consciousness* (Holst, 2019, p. 6).

Freire's theories of education (and schools) is that they typically play a violent role in the name of education, where the dominant forces in society harness education to serve their interests through “banking” specific knowledge in the minds of the next generation of workers, for the purpose of exploitation. In his *Pedagogy of the Oppressed* Freire raises the possibility that this can be challenged by transforming the relationship between educator and educatee to one of a mutual learning and teaching exchange around that which needs to be known.

Closer to home, Christie and Collins (1983) describe in detail how the education of the Apartheid era was formulated to reproduce the particular social relations on which that system was predicated. White learners were educated to fulfil dominant and professional roles, while their Black counterparts were trained for manual labour. This education was both practical and ideological, providing the appropriate skills and mindsets for the designated roles, for the maintenance of a particular set of social relations.

Others have raised the concern that the current neoliberal trajectory of education will diminish the quality of education further and further. Patrick warns that the discourse of neoliberalism is entwined with that of “Globalisation and the knowledge economy” with the “risk that neoliberal ideologies will remain entrenched while the aims of education are eroded to a set of functionalist outcomes” (2013, p.



1). In examining trends within this trio of concepts, Patrick notes that it is possible to identify “Two global themes: firstly, neoliberalism, the knowledge economy, and the commodification of learning, and secondly, the learner as subject and subjectified” (p. 2). She concludes that the only way to protect education from being used as a commodity, is to focus it towards the development of the individual: “Not in accordance with economic imperatives but in accordance with wellbeing and individual flourishing” (p. 6). This kind of thinking is aligned to statements in South Africa’s education policy documents which speak of “Social transformation ... Active and critical learning ... High knowledge and high skills ... Human rights, inclusivity, environmental and social justice ... Valuing indigenous knowledge systems... Credibility, quality and efficiency” (DBE, n.d. para. 3).

Teachers and schools are unwitting agents in implementing *and* replicating what policy-makers decide. Policy-makers are largely influenced by the forces that exert the biggest push. Examining these relations and how they translate into praxis is key to building the agency of the governed. In the same way that education can and does push the neoliberal agenda, so it can push any other agenda too. Freire speaks of another kind of learning that is dialogic, co-created by educator and educate (Rugat & Osman, 2013). Tibbits and Weldon (2017) speak of the “Growing literature on the role of education in supporting changes in society’s processes of governance, institutional structures and leadership in order to promote democratic processes, transparency and accountability” (p. 444). There is an inherent judgment about the role of education in “building” individuals and society. Education has been used to indoctrinate, control, manage and liberate people throughout history, and throughout the world. Tibbits and Weldon quote Enslin when they report that in South Africa, “Education under apartheid was regarded as a science and aimed to develop conformity and obedience from all South Africans” (p. 446). The post-1994 government claimed in their 1995 White Paper on Education and Training that, “The goal of post-apartheid education was ... the promotion of a democratic, free, equal, just and peaceful society with well-informed and critical citizens” (p. 448). None of this is surprising, given the fact that schools are assumed by most people to prepare the youth for life as an adult. Thus the policy makers from opposite ends of the ideological spectrum want schools and teachers to promote their respective agendas.

In South Africa, given the massive scale of the impact of the Apartheid atrocity on the whole society, distorting as it did social relations in multiple ways, it was obvious that the reconfiguration of education was going to be a primary and urgent task of the post-1994 government. In the space of 26 years, the whole approach to education and the curriculum has been revised three times (Noor Davids, 2016), and now the Covid pandemic has unexpectedly imposed a fourth change. While all these changes were predictably totally disruptive for all stakeholders, it was an indication of the challenge at hand: how to

resolve an inherited education system designed for doubtful outcomes, with its grossly inadequate outcomes?

The above comments state the case that is incontrovertible: education in general and schools in particular deliver ideology and agendas on behalf of the dominant forces (or the government in cases where there are competing forces). Is this always a bad thing? It is easy to cast aspersions when the motives are obviously questionable and socially abusive, but what if they are not? What if the agenda is to promote the well-being of the population, as Freire suggests, or as Kadar Asmal suggested in 2000? It is probable that every vocational teacher in the world will tell you that they teach to uplift, not to oppress. What if educational policy is designed to undo previous harm? Harris (2018) quotes Jonathan Jansen as describing the approach to education revision in South Africa after 1994 as “compensatory legitimization” (p. 11).

The South African Schools Act No. 84 of 1996, was clear that a new education system was necessary and that it should serve both the individual and the society. In its preamble it states,

*WHEREAS this country requires a new national system for schools which will redress past injustices in educational provision, provide an education of progressively high quality for all learners and in so doing lay a strong foundation for the development of all our people's talents and capabilities, advance the democratic transformation of society, combat racism and sexism and all other forms of unfair discrimination and intolerance, contribute to the eradication of poverty and the economic wellbeing of society, protect and advance our diverse cultures and languages, uphold the rights of all learners, parents and educators, and promote their acceptance of responsibility for the organisation, governance and funding of schools in partnership with the State (SAGe, 1996, p. 1).*

In this Act there was a clear acceptance that schools were identified as key role-players in the reconstruction of South African society as a democratic state.

In the document entitled *Manifesto on Values, Education and Democracy*, the then Working Group on Values in Education, Values, Education and Democracy under the leadership of Kadar Asmal, attempted to rethink education for democracy, in order to give substance to the South African Schools Act. The aim of the manifesto was, “an effort to flesh out the [new] South African idea in the educational arena. It is to distil the good things of our past and give them definition, for the education of future generations of South Africans” (2001, p. 1). This group identified “six qualities the education system should actively promote: Equity, Tolerance, Multilingualism, Openness, Accountability and Social Honour” (p. 2). These six qualities were then applied to a further ten ideals that would be explicitly

guide educational policy-making and be built into the school curricula and classroom practice, “Democracy, Social Justice, Equality, Non-racism and Non-sexism, Ubuntu (Human Dignity), An Open Society, Accountability (Responsibility), The Rule of Law, Respect, and Reconciliation” (p. 2). Curriculum 2005 was based on this Manifesto. There is no coyness in this statement that articulates the agendas of the manifesto that would guide policy development in education. Asmal is clearly placing a political output onto the revised education curriculum. In those heady days of liberation from Apartheid, it did not seem at all sinister, but was even seen as critical. Why then does what Motshekga and her team want to do now seem so different?

After serious difficulties with regard to implementation, Curriculum 2005 was replaced by the National Curriculum Statement in 2002, which itself was revised and repackaged as the Curriculum and Assessment Policy Statement (CAPS) in 2011 (Noor Davids, 2016). All of these programmes retain the intention specified in the preface of the South African Schools Act, specifically committing education to contributing to the achievement of the objectives of the Constitution (CAPS, 2012), however their respective means are quite different. Noor Davids (2016) suggests that the current plan to make History compulsory is a fourth attempt to make the curriculum achieve a political objective.

The manifesto designed by Auerbach *et al* in 2000 at Asmal’s behest is the closest alignment between objectives and approach to teaching and learning. There is something of a contradiction between the ideals expressed in the South African Schools Act and the way the CAPS programme is prescribed, with a high degree of control and specification, with almost no space for creative and critical thinking. It is this trend that may be informing Noor’s “fourth attempt”. What we see here in South Africa is echoed in most, if not all, countries to one degree or another. The point is that the influence of education on society is undeniable. The question is: how is it used in different contexts, to achieve what kind of society, serving which interests, on behalf of whom?

The concerns raised by many, articulated here by Freire and Patrick, are at the heart of the question about the purpose of education. It is a question for learners, for parents, for teachers, for schools, for policy-makers. It will affect the future, of the individual and of society. In locating the proposed compulsory History policy in this context, the question becomes more relevant: How does the DBE understand the purpose of education? More than most disciplines, school History is particularly vulnerable to use and abuse. Tied as it is to communicating the stories of the past and present, it has potency different to that of, say, arithmetic, in determining how a society understands itself; and how it determines its political life through governance options, expressed through policy.

### *School History and history*

Having noted the close relationship between education and society, in this section, I will discuss the relationship between History as a school subject and history in general. Kadar Asmal tells us that the,

*Studying, writing and teaching of history [is critically important nowadays]... Part of the reason is that it is the chief business of historians to remember what others are inclined to forget, and thereby to keep alive the role of historical memory in the general culture of society. For the fact that we carry any knowledge of the past is not a matter of people constantly remembering: people remember because teachers and writers need constantly to remind them* (2001, para. 4).

School History is a key site where citizens of a country learn the stories of their immediate and international contexts. Stories of the past have existed for as long as people have lived in even the smallest groups, and may even “be indispensable for human existence” (Meretoja, 2018, p. 1). Stories (and art) have existed always to assist people to make sense of the world around them. Meretoja goes on to speak of how stories as narratives “are practices of sense-making ... that can be oppressive, empowering, or both” (p. 2). Before the ages of writing and recording, and when communities were small enough to sit in regular and frequent collective gatherings, oral stories helped communities recall, repeat and understand their own narratives, their own cultures, values and social practices, thus assisting them to develop a sense of identity, as individuals and as communities. Since the formalisation of societies, the stories have likewise become formalised, and increasingly, they have become integrated into how societies govern themselves. The public, or shared, stories have evolved into valuable assets, enabling multiple transactions of culture, of power, of commodities. In a few short decades, the stories of globalisation have resulted in mobile phones in every nook and cranny of the world, which then shares the stories even wider.

What has this to do with school History? Well, everything, it seems. The stories told in History classrooms become the official story of who we are, the truth according to the textbooks (Sheldon, 2012).

### Purpose of school History

The way in which the history of a place is recorded and presented determines how citizens understand their own history, and associated with that, their complex identities (Asmal, 2000; Bertram, 2020; Ferro, 2003; Haydn, 2012; Sheldon, 2012). This has been discussed in detail earlier in this thesis in the context of citizenship, identity and nation-building. School History can also have a more proactive impact, which is one of the primary concerns of this study, of specifically and even intentionally, affecting how

citizens on a country do, or should, view not only themselves but others. It has and can happen for good or for bad purposes. In South Africa, this notion was used by the Apartheid state to explain and justify the developing hegemony of White descendants of Europeans from the mid-19th century all the way until 1994 (Auerbach, 1964; Christie & Collins, 1982; Cross, 1994). That this has been the case both during Apartheid and post-1994 has been noted by various scholars and commentators. Our own CAPS documents are explicit in stating that History must contribute to the development of democracy in South Africa. The HMTT report speaks openly about this imperative.

Bertram (2020) defines two trends in relation to school History: the one that is designed to foster national identity and “collective memory” (p. 5) through telling factual stories drawing on and promoting memory. The other trend is one that is more concerned with building historical skills and tends to draw from a wider more globalised narrative, and is referred to as “disciplinary History. The former focuses on “commemoration, memory and heritage” (P. 5) in a way that is easily “created by those in positions of power to serve particular political and identity needs” (p. 6). The latter encourages multi-perspectivity and embraces ambiguity. The History that the HMTT is proposing for South Africa is predominantly of the former trend, but pays lip service to the latter.

The power of the influence of school History cannot be underestimated, for it defines for us who we are from the earliest age. Marc Ferro, in his book, *The Use and Abuse of History*, says in his preface,

*Our image of other peoples, or of ourselves for that matter, reflects the history we are taught as children. This history marks us for life. Its representation, which is for each one of us a discovery of the world, of the past of societies, embraces all our passing or permanent opinions, so that the traces of our first questioning, our first emotions, remain indelible* (2003, p. ix).

There is little doubt that this value of history has been used and abused countless times, in countless contexts. Ferro goes on to remind us of the power inherent in “controlling” the past:

*To control the past is to master the present, to legitimize dominion and justify legal claims. It is the dominant powers – states, churches, political parties, private interests – which own or finance the media or means of reproduction, whether it be school-books or strip-cartoons, films or television programmes”* (p. x).

Is this what the DBE is trying to do with the revision of the History curriculum? Noor Davids (2016) and others who have commented on the compulsory History proposal definitely think so. But if it was not for reasons of enabling political power, then it could be for good. Tibbits and Weldon (2017) assure us that the relevance of History teaching is its role in facilitating telling real stories and preserving collective memory to enable “public deliberation” (p. 442). McDonald (2016) tells us about the value

of using History to enable us to know and understand what “influences, values and norms” determine how we engage with the past. Done well, a study of History can “promote plurality and multi-perspectivity in the present and for the future” (p. 67). Noor Davids brings in an interesting discussion related to the purpose of school History where he references a model developed by Barton and Levstik that addresses the primary purposes of History teaching, in which they name three purposes “patriotic nationalism, academic discipline and democratic participation” (2016, p. 87). He goes on to note that, in line with these purposes, different interests (governmental and non-governmental politicians, educators and the general public) will push for teaching History in the way that serves their ends. Those who decide what gets taught are almost never those that actually do the teaching, but are, at best, often subject experts. At worst, they are politicians. In the case of social studies subjects, such as History or Life Orientation, it is not unusual for imperatives other than education to predominate. Asmal adds that teaching History is particularly important, and more so at moments of change, as it teaches people “historical awareness” and about change over time, that “no particular stage of human society can ever be permanent” (2001, para. 5). He goes on to define two key imperatives of “Good History”: that it helps,

*... to shape qualities of imagination, sensitivity, balance, accuracy and discriminating judgement [and it helps] prevent citizens from becoming captives of any crude or partisan versions of the past - it involves providing multiple perspectives on how various elements have come together to create a society or to build a nation (para. 7-8).*

In the case of South Africa, these two points are particularly salient.

Teaching History in schools is clearly not straight forward. There has been much scholarship on the subject, mainly centring on whether it is even possible to teach history to children, when history is about select stories that need to be interpreted in time and place in multiple ways. Or whether school History can be anything more than a cultural storytelling. Mario Carretero has written a whole book dedicated to exploring school History, called *Teaching History and Memories in Global Worlds. Constructing Patriotism*, in which he asserts that History teaching is organised “around a basic contradiction between those national identity building goals and the more recent need to teach history as a discipline” (2011, p. xxiv). Carretero reports on the past few decades in which politicians have used a particular telling of History for political reasons. He speaks of Putin in Russia, who ordered the revision of school History curricula and textbooks to reflect a nationalist character. In the United States (US), similar moves have happened in several states. In a number of South American countries, narratives were purposely rewritten to tell a different story to the one commonly known. In countries like Japan, Germany and the US, particular historical narratives are sanitised out of sections of history such as the World Wars.

Carretero reports on instances of storytelling about historical conflict events taught in the different countries involved in the conflict who will tell it from the perspective of that country. In this instance, he uses examples of Great Britain/India and Korea/Japan. His book investigates case studies in United States, Mexico, Estonia, Germany, and Spain, where the state has clearly influenced the nature and telling of school History for reasons of building national allegiance to one degree or another.

Sheldon (2012) describes similar trends in the UK that before the 1980s, a nationalist narrative, telling the story of the nation, dominated school History. This changed in the 1980s for a few decades in alignment with a change in general pedagogic practice which favoured a more child-centred and enquiry-based education, introducing a greater emphasis on historical skills teaching rather than a chronological UK-based storytelling. Sheldon notes that in more recent years, the government has taken to promoting the notion of revising school History back to the national narrative. She ascribes this to contextual issues,

*At the same time, riots in the cities, terrorist threats, the scale of recent immigration and the re-evaluation of multiculturalism have led politicians to revisit the potential for history in school to foster a cohesive national identity amongst future citizens and reinforce national values through a common story and heritage (2012, p. 269).*

Sheldon ascribes the change to pressure from Conservative Party politicians who bemoaned that voters did not know their own history, were consequently apathetic and stayed away from the polls. The trend is now back to telling good stories about the glories of the English past to build national pride and allegiance amongst a youth perceived to be somewhat disaffected. This is the very debate taking place in South Africa currently.

In explaining the phenomenon, Sheldon (2011; 2012) suggests that the change in History teaching in the post-Cold War period was assisted by access to technology and influenced by a less authoritarian popular culture generally, where a more child-centred approach to education was beginning to attract more and more followers. In the case of History teaching, this led to a less chronological and narrative-based telling of the past to a more topic-oriented approach. Schools that could afford to stand away from state education were typically more likely to be more innovative in their teaching practices. They disrupted the normal fare, introducing a more investigative character to the subject and using multiple sources to assist in the storytelling, such as documentaries, photographs, written and oral sources, visiting sites of historical events, including debate and point of view into discussions, and the like.

Sheldon goes on to describe how by the 1980s and the strengthening of a neoliberal approach to politics, including education, under the Thatcher government, this skills-based approach was frowned upon.

What followed was a keen debate not only about how education should be more commercialised according to the demands of the modern economy, but how History education should support the national story, bringing together neoliberalism and nationalism. Sheldon reports on the Education Reform Act of 1988 in Great Britain, according to which education became once again a national mandate, removing the right of schools to have greater say in what happened in their classrooms. In this policy, History was to become once more a national chronology of predetermined facts (2012). It is not irrelevant, suggests Sheldon (and others) that this move coincided with a wave of public unrest in Great Britain characterised by anti-immigrant sentiment, terrorist threats, and a growth in extremist right wing reaction. In this instance, as in our own South African experience, the solution is proposed based on building social cohesion through managing the stories children are exposed to in History classrooms. Sheldon (2011) quotes History teacher and academic, John D. Clare as saying,

*Many of the people who want us to teach national identity have a hidden agenda that they want to teach Englishness, which they see as being under siege from an influx of immigrants, and I think they see Englishness as something which is dying, and they want to use history to protect it, to get across a certain political agenda with the children. (p. 52).*

The example of England is transferable to many contexts. In South Africa we have had brutal experience of the use of History as a nation-building exercise during the Apartheid years (Tibbits & Weldon, 2017). There is a real concern that the same may happen again. This thrust is explicitly indicated in the submission made by SADTU to the DBE in 2014 and in the HMTT report of 2018. This concern is exacerbated by the way that this tendency appears to be trending internationally. June Bam (2000) warns that the politicisation of school History for reasons of nation-building and social cohesion run the risk of suppressing “critical consciousness and, more specifically, the suppression of historical consciousness” (p. 1).

This contestation around the purposes of teaching History, coupled with the direct and close relationship between the stories of places and people, how people identify with “their” place defining a national identity, and the concepts of citizenship, nationalism and the state, make the subject highly vulnerable to exploitation for political ends. As Haydn asks, in reference to the way school History can “cultivate” (or to use Minister Motshekga’s word, “mould”) citizens that the state wants,

*In today’s world, is it better to have citizens who are loyal, compliant and credulous, or citizens who are discerning in their ability to handle information intelligently, and who have been educated to be constructively critical in evaluating the reliability and authority of what they are told, by politicians, the media, the internet or even historians? (2012, p. 274).*



### The History curriculum

When a curriculum for schools is defined, it presupposes a rationale for how the content is selected and defined. Arithmetic is less contentious than History. Deciding what goes into a History curriculum will define what stories get told and which ones don't make the cut. Inevitably, some histories are suppressed in this way. Because curricula are largely fixed, at least for a time, this means that cohorts of learners will have their understanding of where they come from (i.e. their histories) shaped for them. This can and has been used and abused all over the world for political purposes, as I have reported in earlier parts of this thesis. Governments use the teaching of History for promoting "national pride and patriotism" at school level, where the emphasis of the History curriculum in some countries is increasingly on ensuring that "our" people know "our" history, in a broader context of the rise of neoliberal conservatism worldwide. This has been well documented as described above.

The detailed discussion in the HMTT report criticising the current CAPS curriculum and making extensive suggestions primarily advocating an Afro-centric curriculum, and bring in a gendered stories as well. They make a recommendation of how the curriculum could be defined, and this task is core to their assignment after their reappointment in 2018.

Of course, deciding on curriculum content is extremely powerful and will be how the control of History is enacted in schools in order to control history, the present, and potentially the future. The other side of the pedagogy of what is taught, is how it is taught.

### The presentation of history in History classrooms

The above brief input on the vulnerabilities of History, and how it has both overtly and covertly been used for political ends raises the question about how History is presented in the classroom. Given a long tradition of an uncritical acceptance of history as factual stories about the past, and given that this is typically the paradigm within which teacher training has happened internationally, it is not surprising that most History classrooms are typically places where students complain about the volume of dates and facts that they need to regurgitate in an uncritical retelling of what the teacher and the textbooks have presented. Haydn (2012) speaks of History typically being a 'received' subject, a story presented as fact. In a study carried out by Thorp in Sweden in 2016, he describes how History is typically presented in classrooms "The dominating use was one that presents historical narrative as something devoid of interpretational and representational practices since history is presented as something factual and certain." (p. 72) In respect of teachers, Thorp goes on to report on his findings that they generally "Encountered difficulties in engaging with the complexities of historical narratives and their own

relations to them” (p. 72). This view is supported by Tibbits and Weldon (2017) and Nussey (2018) in the South African context.

This uncritical delivery of history plays directly into the agenda of those who would use History as a patriotic, nation-building exercise, rather than for the purposes of building democracy. To counter this is to introduce historical skills into the process of teaching and learning History, and to ensure that teacher training can meet this task. These are powerful silences in the HMTT recommendations.

#### History skills: Storytelling, historical thinking and critical thinking

There is a significant case to defend school History, despite the dangers of it being a potential indoctrinating force, and despite the pressure from all sides to devalue the subject on the basis that there are few direct jobs to be had from the subject (Asmal, 2000; Mettler, 2016; Nussey, 2018; Sheldon, 2012). From the personal to the collective, it has been amply noted that an understanding of history is crucial to identity, connection, understanding the present and shaping the future (Ferro, 2003 Haydn, 2012; Keppel, 2015; Sheldon, 2012). It is possible that the case for history is even more important in places disrupted by conflict and/or transformation. However, we are back to the same questions: whose voice? Whose story? How will the stories be used, by whom? A critical additional question is, how do we present History in classrooms in ways that avoid the pitfalls of ‘single stories’ and realise the powerful opportunities for building critical engagement with the way we have lived, do and will live. Teaching historical thinking is one way to do this, so that learners can apply these skills to *any* telling of *any* story in a way that is critical, interrogative and contextualised. In this way, they not only can appreciate the plurality of historical narratives, the complexity of society but they can learn to view their lives in a critical and informed manner. They can be critical of the present, of governance, of power and control. They can become democratic thinkers, more immune to political manipulation.

History academic Ben Keppel reminds us of the importance of historical enquiry and process, that “If all you have is a pile of flash card facts ... you really don’t know anything” (2015, para. 17). On the other hand, Haydn facetiously warns, “Of course, by placing the emphasis on radical independence of mind, we run the risk of producing, for example, an intelligent traitor rather than a stupid patriot” (p. 284). More seriously, he says that critical and interrogative historical skills are especially useful “in a society that has become increasingly sophisticated in terms of manipulating and distorting information.” (p. 283).

#### The History dilemma

Van Eerden and Warnich (2018) warn that while nation-building through telling even inclusive historical narratives may seem to be useful, it can in fact lead to heightened tensions and conflict. Tibbits

and Weldon (2017) agree, referencing a number of writers who propose that a careful management of History as a school subject can rather contribute powerfully to “transitional justice processes” (p. 442). The great challenge with regard to the purposes of teaching History to impressionable young future citizens is motive. José Álvarez Junco asks us to ask, “Who speaks through the voice of texts and curriculum?” (Carretero, 2011, p. xvii). There is no getting away from the “fact” that whatever stories people hear, and how they hear them, will determine their view of themselves, others, society, and the past, present and future. Perhaps the best we can do is to ensure that learners have competent historical skills so that they can ascertain as clearly as possible whose voice is dominant, what they hope to achieve and what the learner thinks about it.

### **Concluding remarks**

In this chapter, I have attempted to provide a theoretical framing that spans the theories around critical discourse analysis and how this relates to policy making, as well as to bring in the key concepts of influence.

This chapter has outlined the theoretical framework that defines my approach to my study, and highlights some key factors including that critical discourse analysis provides a powerful tool to gain insight into understanding the dynamics underpinning socio-political phenomena. It enables a view into “group relations of power, dominance and inequality. [revealing] enacted ... strategies of dominance and resistance in social relationships of class, gender, ethnicity race, sexual orientation, language, religion, age, nationality or world religion” (van Dijk, 1995, p. 18). Understanding these relations gives insight into the “underlying ideology [in order to] uncover, reveal or disclose what is implicit, hidden or otherwise not immediately obvious” (p. 18).

The aim of my thesis is to do exactly that: to understand what may be surprising about the proposed compulsory History policy, put forward by the ANC government. To reveal what the discourse evident in a range of documents communicates, and to consider the implications for both power and resistance.

In Chapter 3 following I provide a socio-political and historical context both in respect of time and place, and relevance to my thesis.

### Chapter 3: Context and background

#### Introduction

Having provided a theoretical framing of my study in Chapter 2, here I provide an historical contextualisation, based on presenting an admittedly incomplete top-slice and abbreviated historical overview of the South African socio-political economy, with its own peculiar trajectory. I hone in on specific aspects to provide background to this thesis, including a general overview of the political economy focussing on recent history, a history of education in general and History education in particular, and an overview of policy making in South Africa. One key theme that emerges relevant to my study is that education in general and History education in particular, in South Africa have always been politicised, serving the national agenda, in one way or another, for one end or another.

Context defines how people engage – with each other; with their material realities; with their pasts. To carry out a discourse analysis of any kind, it is important to place the discourse in time and space. As discussed in Chapter 2, CDA theorists are particularly concerned with how discourse is both a product of its time and place and in turn influences the trajectory of history, thus emphasising the centrality of context (Fairclough, 2013; Filardo-Llamas & Boyd, 2017; Hook, 2001; Wodac, 2015; Wodac & Meyer, 2008). Filardo-Llamas & Boyd (2017, p. 312/3) write,

*As with most CDA investigations, we need to consider the immediate and wider contexts which define the text. This includes the co-text, situational context as well as socio-cultural and historical context, because such features, “particularly those such as socially defined role, location, timing, are pivotal in the definition of political discourse (Chilton and, 2002, p. 16).*

In this chapter I describe how the story of education in South Africa provides a key contextual framing of the research questions of this thesis, with some general input regarding education systems and policies, structures and responsibilities over time. The aim is to trace how education has been problematized by policy. This discussion is followed by a brief history of History education in South Africa, with its own unique trajectory, from the Apartheid to the present, cogent to my research focus. It includes the story of the compulsory history policy proposal and how the idea to replace the currently compulsory Life Orientation for Citizenship curriculum with compulsory History emerged, along with current debates about this proposal. I also provide a brief look at policy-making in South Africa, to add insight into how policies become law, and what makes policy-making vulnerable to manipulation by policy actors. By presenting this contextual framing, my lens is consciously focussed on a South African perspective.

## **What is happening in the South African context?**

What follows is a snapshot of the contextual factors that impact directly on my inquiry.

### *A brief look at the South African socio-political economy*

As in any location, the story is long and complex. In this abbreviated glimpse, I aim to highlight those factors that seem relevant to locate my thesis in time and place, giving some branches, albeit inadequate, upon which to hang the fruit of my research.

In 1994, the first real general election took place in South Africa to great local and international fanfare. In this powerful moment, legislated Apartheid was voted out and a new democratically elected government under the curatorship of Nelson Mandela was installed in the old Union buildings in Pretoria. Since then, we are on to our fourth President, and the fanfare both locally and abroad has become quieter and quieter, suffused with disappointment at the growing degree of incompetence and mismanagement, most of it ascribed to the period when Jacob Zuma was at the political helm. Whether we are a real democracy is hardly debatable: measured against the Constitution or the descriptions of democracy, we are not yet there (Adetiba & Asuelime; 2018; Mlaba, 2020; Swilling, 2017). While there are obvious good changes that have been instituted, mainly to the legal framework defined by a well-respected constitution, there is little that has really changed in the political economy. The wealth of the country remains largely in the hands of a minority of White-owned corporations, with a smattering of Black-owned businesses. The vast majority of the population remain excluded from the economy, and the vast majority of this majority are Black. This lack of “economic freedom” has fuelled extensive protest against the government of the African National Congress (ANC).

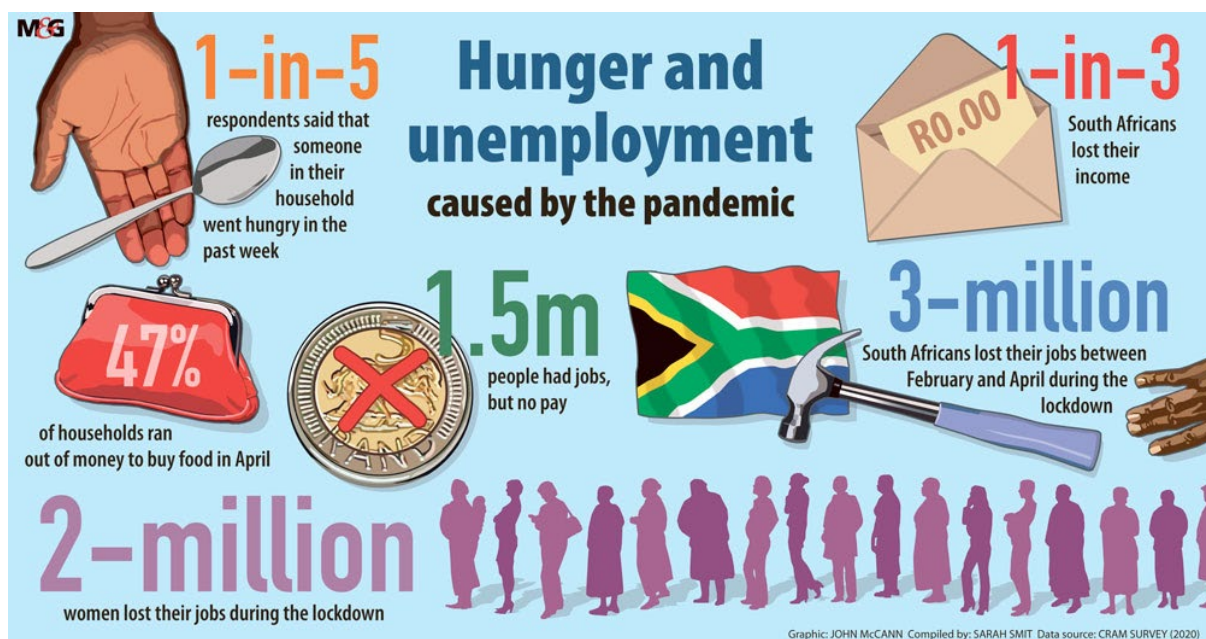
There are a wide range of socio-economic and political impacts that keep us where we currently are, both spawned by the Apartheid regime as well as by policy decisions taken after 1994 by the ANC-led government (Swilling, 2017; Suttner, 2021, 2022). These have resulted in serious challenges facing the country as a whole, the people within it, and especially all aspects of governance. Education has had a particularly rough ride, both during the Apartheid regime and in the years subsequent to 1994 (Jansen & Taylor, 2003; Matebula, 2018; Roodt, 2018; Spaull, 2019). The plan to make History a compulsory school subject to matriculation level is indelibly tied into what has been going on in the past quarter of a century.

In describing this context I draw on various texts including historical narratives and socio-political analyses, as well as primary texts such as the Constitution and Bill of Rights. The scope of this study only allows for a brief description of this complex context in broadest brush strokes. In addition to exploring a broad-based understanding of the current socioeconomic and political landscape in South

Africa, I explore how this circumstance raises serious concerns for the future, specifically in respect of the role played by education in general and History education in particular.

### *What is going on in South Africa?*

South Africa in 2021 is a confusing place. Still a country with one the highest Gini co-efficient readings in the world (Mlaba, 2020), South Africa may have voted out race-based inequality, but it has certainly not changed its economic equality by much. The World Population Review reports that in South Africa, “The richest 10% hold 71% of the wealth, while the poorest 60% hold just 7% of the wealth. Additionally, more than half of South Africa's population, about 55.5%, live in poverty, earning less than \$83 (R1238) per month” (2021). This figure is likely to be inaccurate, with a more likely amount significantly lower. In a Mail & Guardian article published in July 2020 reporting on the findings of the National Income Dynamics Coronavirus Rapid Mobile Survey (Nids-Cram), “About 3-million South Africans have lost their jobs during the country’s nationwide lockdown to curb the spread of Covid-19. An additional 1.5-million workers have lost their incomes as a result of the lockdown” (Smit, 2020). The following infographic published in the Mail & Guardian provides a snapshot summary of the lockdown the impacts, which are an escalation of a dire situation that existed pre-Covid:



has been regained, the Nids-Cram survey found. In line with findings elsewhere, poor workers, women, workers living in rural areas, and unskilled and less educated workers have experienced the largest declines in employment during the lockdown (Brown, 2020). According to the Nids-Cram survey, the percentage decline in employment between February and June was 10 times higher for the poorest 50% of workers compared to the richest 25% of workers. Informal workers faced twice the employment loss of formal workers” (Smit, 2020). While the above picture reports on Covid-19 impacts, the reality is that it describes a worsening of a circumstance that *already* existed.

In the past decade, South Africa has been destabilised by a litany of challenges from even before the time that Jacob Zuma took the president’s chair in 2009, with a steady deterioration in all aspects of life from that time until now, three years after Zuma’s ignominious exit (Swilling, 2017). This period was characterised by rising unemployment, increasing service delivery protests and social unrest, increasing inflation, foreign exchange instability and an increasingly worthless local currency, mass-scale looting of the state fiscus, cronyism whereby Zuma evicted his “enemies” and replaced them with his friends, in oftentimes embarrassing sleights of hand, destroyed watchdog organisations, and other incidents that fundamentally called into question governance competencies (Swilling, 2017). The Marikana massacre remains a shocking case in point (Naicker, 2020).

Despite the high instability and the consistent challenge to the democratic principles of the “Mandela government” and indeed the Constitution of South Africa, these years of flagrantly poor management, even mismanagement, have spawned both positive and negative political reaction. This same period saw the increase in support of more extremist politics in the land, including the formation and popularity of parties such as the Economic Freedom Fighters, who with their leader, Julius Malema, have consistently challenged both the structures of governance and the sensitivities of racial tension, in ways likened by some to fascism (du Toit, 2020). Also, a number of civil society organisations, such as Equal Education, Section 27, Right2Know and others have successfully challenged poor governance in the field of education, social and environmental justice and in the judiciary.

A highly provocative feature of post-1994 socio-political unrest in South Africa has been outbreaks of xenophobic violence. The extreme nature of this phenomenon has alarmed South Africans in powerful ways. The outbreaks have been seemingly spontaneous and uncontained, random, country-wide, extremely violent, and difficult to control. In 2020, the Human Rights Watch reported that xenophobic mob attacks are carried out by Black South Africans who are angry at the economic and living conditions they are experiencing – poverty and inequality, chronically high unemployment, high crime rates, and poor public services. They are directing this anger at African and Asian foreigners who they believe are taking jobs and livelihoods away from South Africans.

Xenophobia is definitely not restricted to South Africa, although what has happened here may be more extreme and more violent than what has been taking place in the UK for decades, for example. Solomon and Kosaka note that xenophobia is not unusual, is linked to globalisation, post-coloniality transitional societies, where “scapegoating” of foreign nationals happens in contexts “Where unfulfilled expectations of a new democracy result in the foreigner coming to embody unemployment, poverty and deprivation” (2009, p. 6). This certainly seems to apply to post 1994 South Africa. Xenophobic attacks intensified in around 2007 – 2009, and have flared up on and off since that time, always with tragic and desperate outcomes. In many instance reported in the media and by Solomon and Kosaka, xenophobia has been almost institutionalised by police and immigration officials who have been accused of victimising foreign nationals. An unusual feature of South African instances of xenophobia is the fact that it targets mainly Black nationals from other parts of Africa as well as from Asia. It is almost never committed against European American or Chinese nationals. This alarming racialised aspect of xenophobia is at the heart of the attempts by the HMTT to use an Afro-centric History education as a mechanism to build pan-African sympathies and allegiances.

Xenophobia is complex but is inextricably linked to concepts of identity, nationalism and citizenship. That these concepts remain fraught with uncertainty and confusion in South Africa may well be a contributing factor to xenophobia. On the other hand, it may be these very concepts that hold the key to addressing this horrific phenomenon. In some ways, it is clear that this is one of the imperatives implicit in the compulsory History proposal and the revised curriculum.

Economically, there has been a steady erosion of the socialist rhetoric of the pre-1994 liberation struggle, with an increasingly neo-liberal discourse displacing the language of economic freedom, land redistribution, and equal opportunity (Ansari, 2021; Mosala, Venter & Bain, 2017). In 1994 the ANC government put forward the Reconstruction and Development Programme (RDP) as its policy to ensure equality and democracy through,

*[f]ive major policy programmes [...] as follows: create a strong, dynamic and balanced economy; Develop human resource capacity of all South Africans; Ensure that no one suffers racial or gender discrimination in hiring, promotion or training situations; Develop a prosperous, balanced regional economy in Southern Africa; and Democratise the state and society. (SAHO, 2014, para. 1).*

Many positive improvements came with the RDP which did assist the most marginalised, including a range of welfare interventions such as grants and free health care and education. However, its impact was constrained by multiple factors, including legacy issues, public administration capacity and conservative taxation (SAHO, 2014). Basically the New ANC government did not have the wherewithal



to really implement the RDP. In 1996, the RDP was replaced by a macroeconomic policy framework called the Growth, Employment and Redistribution (GEAR) strategy.

GEAR “encompassed most of the social objectives of the RDP but was also aimed at reducing fiscal deficits, lowering inflation, maintaining exchange rate stability, decreasing barriers to trade and liberalizing capital flows” (SAHO, 2014, para. 4). While GEAR’s objectives were met to a degree, the direction of this economic policy fell foul of the labour movement, who criticised it for being neo-liberal, and anti-socialist, especially as it did not impact on growing levels of unemployment and consequent poverty. A new Black middle class did emerge, but so small that it could never be described as economic transformation and redress.

After nearly 10 years of GEAR, the ANC government swapped this policy for the Accelerated and Shared Growth Initiative for South Africa (ASGISA) in 2005. The aim of ASGISA was to “Reduce poverty by 2010, and halving unemployment by 2014 from the 28% in 2004 to 14% by 2012; and also recognized that the policies implemented to address these issues needed to be at the forefront of economic policy decision making” (SAHO, 2014, para. 6).

Four years later, after Jacob Zuma had replaced Thabo Mbeki as president, the government again changed the course of economic policy by declaring the New Growth Path, followed just three years later by the National Development Plan (NDP)-2030, with a somewhat longer view.

The challenge to transform the economy of South Africa from being one that supported the privilege of a small minority through the rampant exploitation of a large minority, to one that built egalitarianism and economic opportunity and basic well-being was never going to be easy. The pressure from the large population of poor people (the voters) who looked to the ANC for not only political freedom, but for the freedom from poverty was bound to result in policies full of promises. As Mosala, Venter & Bain (2017) say, the ANC had,

*two possible options: either to continue with the ‘colonialist economic system’ which was to become the neo-liberal economy of 1994 and beyond, characterised by a succession of economic policies described above, or to dismantle the prevailing ownership in the economy through radical nationalisation and redistribution (p. 338).*

They did not choose the latter. The legacy of the Apartheid economy together with the economic downturn that characterised the decade before 1994 was far too great a challenge for a new and inexperienced cohort of policy makers. The various policies passed with great rapidity all express the desire to meet the needs of the economically marginalised, but they lacked the means and the courage to fully repurpose the economy along a socialist line, as expressed so clearly in the Freedom Charter

and translated politically into the Constitution. The net result of this conundrum was a desperate attempt to grow the economy and support a welfare agenda. The discourse of the ANC since 1994, has increasingly been one of growth and development.

William Shoki describes this neo-liberal trend bluntly: “The ANC’s economic leadership has mostly brought about rapid deindustrialisation, the consolidation of an extractive and financialised minerals energy complex, and the creation of a black bourgeoisie whose poster boy and billionaire mining magnate Ramaphosa, is now president” (2020, para. 8).

This short overview of South Africa’s political economy since 1994 is overly simplistic, but my aim is to point out a trend of a steady diversion away from the discourse of the liberation struggle, towards a neo-liberal and somewhat conservative discourse, one that foregrounds the interests of the political (and economic) elite rather than the masses, on whose shoulders the ANC gained political power.

### **A brief history of education in South Africa**

Just as the country as a whole has been consistently hammered by poor governance and confused policy design and application in the past decade, so has the education sector taken a lion’s share of the beating. The quality of education in South Africa has been criticised in all quarters, and at all levels. This next section documents some of the key issues facing education in South Africa, including the DBE commitment to making Life Orientation (LO) a core compulsory subject, extolling the importance of this subject, only to change course, claiming that History was the one to consolidate and LO should be dropped.

South Africa’s education challenges are well-documented, from persistent inequalities between schools to school systems in disarray to non-existent infrastructure to being ranked amongst the least competent in the world to protest action bringing universities to a halt (Cross, 2002; Fataar, 2008; Jansen & Taylor, 2003; Matebula, 2018; Mohamed, 2020; Roodt, 2018; Spaull, 2019). The challenges are of gross proportions and will take both political will and extraordinary management decisions to remedy, none of which are likely to materialise in the near future. The disruption to education caused by the Covid pandemic and various levels of lockdown add another profoundly damaging layer to the current circumstance, the impact of which is as yet unmeasurable, but which is likely to be catastrophic (Keevy et al, 2021; Mohamed, 2021). It is also true that the explanation for our current circumstance is extraordinarily complex, and in no way can the following short input do justice to this complexity.

The main points to be made in this dissertation are that South Africa continues to have a very unequal and a poor standard of education which results in the perpetuation of structural socio-economic inequalities in South Africa. While there are overarching standards determined by qualification boards,

there are basically two vastly unequal streams of education, just as there are two economies: one that is experienced by the wealthy (largely White) citizenry, and one that is experienced by the poorer (largely Black) citizenry. This inequality spans teacher qualifications and expertise, resources, infrastructure access to additional information and more. Education in South Africa has a very long history of being politically “hijacked” in one form or another and for various reasons – from colonial times through Apartheid to the current dispensation. How education has evolved, and what different policies have been introduced since the demise of Apartheid contributes to building a picture of the context within which to analyse the proposed compulsory History policy.

Since 1994, education in South Africa has been turned on its head more than once. The profoundly repugnant and appalling impacts of Apartheid Education required a fundamental and total re-imagining that was expected to perform a remarkable act of educational redress. As has been noted elsewhere in this thesis, Apartheid education was unashamedly modelled on promoting and sustaining inequalities based on race (Christie & Collins, 1982; Cross, 2002; Jansen & Taylor, 2003). By the time that the writing was on the wall for Apartheid in the early 1990s, White learners were being funded by the state to a tune of ten times more than Black learners (Fataar, 2008).

#### Education in South Africa under Apartheid

The central policies of Apartheid education were Bantu Education (BE) for Black learners, implemented in 1953, followed a decade later by Christian National Education (CNE) for White learners introduced in 1962. The former policy was formulated in the Eiselen Commission in 1951 (Christie & Collins, 1982). They report, that for the most part, education was seen to “be an integral part of a carefully planned policy of segregated socio-economic development for the people. Above all, it emphasised the functional value of the school as an institution for the transmission and development of cultural heritage” (p. 59)

The Bantu Education Act defined the kind of education that was provided to learners based on providing only sufficient education to train young South Africans to be labourers – in factories, on farms and in domestic service. It promoted racial stereotyping, and was basically an indoctrinating force based on the idea that Black people were naturally inferior to White peoples (and a bit inferior to Indian and Coloured people.) It limited the career and job options that were available to Black adults, ensuring that job reservation for White adults was protected, and the position of disempowered servitude was the lot of Black South Africans.

Christian National Education was the parallel policy of Bantu Education as formulated for education provided in White schools. It promoted the notion of White superiority, was essentially a mechanism

for indoctrination against Black people, communism and other forces that undermined White privilege in South Africa. It was resourced more than four times that of Bantu Education, ensuring that White adults were well prepared for tertiary education, skilled jobs and a life of privilege (Christie & Collins, 1982; Cross, 1994; Hofmeyer, 1982; van Heyningin, 1960).

Van Heyningin writes about the infamous Christian National Education [for White learners] and Bantu Education [for learners] policies of the Apartheid government as being explicitly used to promote cultural hegemony. The policy, “Aims at establishing the Nationalists in power forever by indoctrinating all children in Nationalist ideology from the nursery school right through beyond the university or technical college” (1960, pg 1). Hofmeyer quotes Shingler describing CNE as follows:

*A doctrine of state education based upon the doctrinal infusion and transformation of the public realm. The Christian-Nationalism of the 1948 manifesto is a doctrine predicated on the acquisition of office by the National Party and the pre-eminence of the Afrikaner “volk” in the state (1982, p. 19).*

Both policies had an explicit political agenda, and, according to Professor Nkomo, “... inflicted profound psychological disfigurement, whose symptoms we witness today” (2021, para 11). He references Verwoed’s infamous statement which encapsulates bluntly the political imperatives that underpinned education for the majority under Apartheid:

*There is no place for [the Bantu] in the European community above the level of certain forms of labour ... What is the use of teaching the Bantu child mathematics when it cannot use it in practice? That is quite absurd. Education must train people in accordance with their opportunities in life, according to the sphere in which they live. (Boddy-Evans, 2020, para 3).*

Over 40 years of this systematic de-education was bound to pose an enormous, possibly insurmountable, redress challenge, certainly one that would take more than a generation to address to any real extent.

It is unsurprising that the revolt against Apartheid that picked up momentum in the 1970s was led by school-going youth, who powerfully and inspirationally refused to continue with Bantu Education, and its language of instruction, namely Afrikaans. The post-1994 government was painfully aware of its responsibility with regard to education. It has, however, been criticised for not meeting this responsibility, despite providing relatively high budget allocations to the task.

#### Education policies post-1994

It is a statement of the obvious that 1994 represented an extraordinary moment for South Africa. The enormity of the task that fell to the governors of the new South Africa is difficult even now to imagine.

To take a country that had been managed along the lines of colonialism and neo-fascism for a century or more and to wholly transform it into a democracy must have been a frightening awesome mandate. Every aspect of life would need to be reimagined. Every law would need to be revised. Every organ of governance would need to be repurposed. Needless to say, education was one one massive area, being the means not only of enabling the people of the future but also for undoing a way of thinking, and redoing a new way. According to Chisholm (2003), between 1994 and 2002, education went through three phases, namely:

*The 'cleansing' of the curriculum of its racist and sexist elements in the immediate aftermath of the election. The second involved the implementation of outcomes-based education through C2005. And the third involved the review and revision of C2005 in the light of recommendations made by a Ministerial Review Committee appointed in 2000 (p. 1).*

The third wave resulted in the development and implementation of the Revised National Curriculum Statements (RNCS) in 2002. Since 2003, the RNCS have been revised again also due the difficulties encountered by teachers to implement. Overall, education policy since 1994 has been one of significant gains balanced against compromise, contradiction, impracticality and even incompetence. Decisions have been made for reasons other than educational, and some foundational aspects have still not been addressed. The net result is that education is still in a parlous state, and millions of South Africans are insufficiently educated to empower them to engage successfully in the political economy of the land. The following discussion skims the surface of the complexities of education at the nexus of the old and new South Africas.

For a number of reasons, the initial financing of education in the first years after 1994 was relatively conservative despite the massive change that it entailed, and could not possibly meet the needs of any fundamental redress. (Fataar, 2008). It was not only the curriculum that needed addressing at the dawn of the New South Africa. The gross inequalities in the provisioning of education in South Africa meant that any redress was going to be complex and spectacularly expensive, almost an impossible task. Millions of children needed to be placed in schools that needed to be built, and staffed by trained teachers and resourced with lavatories and libraries. This project remains incomplete in 2021. The links between education and the economy also needed to be addressed, especially in a globalised world economy in which the New South Africa had to integrate itself (Fataar, 2008).

In the first five years, the focus of government was on,

*... three inter-related tasks: dismantling apartheid structures and creating a unified education system, creating a more equitable system of financing in a context of huge demands on our*

*limited financial resources, and creating a policy framework which gave concrete expression to the values that underpinned the post-apartheid state* (Department of Education,, 2001, p. 6).

The policy framework entailed a number of policies and laws including the South African Qualifications Authority (SAQA) Act in 1995, the National Education Policy Act (NEPA) of 1996, the South African Schools Act (SASA) in the same year, the Higher Education Act of 1997, the Further Education and Training Act and the Employment of Educators Act in 1998, the Adult Basic Education and Training Act 2000. These and more were designed to completely reconfigure what was a fundamentally unsuitable system inherited from the previous dispensation.

By 2001, there were measurable positive impacts from these changes, including a massive increase in the numbers of children attending schools, especially secondary schooling; teacher qualifications improved, teacher distribution to rural schools improved, and there was significant improvement in school infrastructure (Department of Education, 2001). While these gains were significant, they did not meet the demands of the population, and inequality in school provision, access and sustainability has never yet been resolved.

Outcomes-Based Education (OBE), while defined by noble intention and redress, and a desire to build a more skilled and technologically competent school leaver, was a resounding failure, which had a wide-ranging impact upon the country, but especially on the first cohort of youth that emerged from the ten-year cycle of its implementation. (Asmal *et al*, 2000; Chisholm, 2003; Fataar, 2008; Jansen, 1998; Jansen & Taylor, 2003). OBE was a reaction to and was designed to overcome the effects of Bantu Education and Christian National Education, as well be a quick-fix way of building a more skills-based approach to learning, in line with the desire to build a more critical and child-centred pedagogy, and the National Qualifications Framework (NQF), which sought to align education more closely with the demands of workplace fielded by both labour and capital (Chisholm, 2003). It aimed to free young people from indoctrination and build a practice of critical thinking and appropriate education, emphasising skills development. It focussed on liberation education – critical thinking, democracy education, need to teach children skills to learn (and unlearn), and individual empowerment. (Asmal *et al*, 2000; Department of Education, 2001).

The contextual pressures of the first five years under the Government of National Unity (GNU) defined the initial policy formulations which they say were characterised by compromise, and resulted in a somewhat contradictory mix (Chisholm, 2004; Jansen, 1998; 2003). On the one hand there was a strong content emphasis on science and technology, while on the other a more child-centric less authoritarian pedagogy. OBE was the policy. It was full of the kind of symbolism that Jansen (1998) referred to, presenting itself as an education-for-liberation curriculum. Jansen says of OBE, that it “Is primarily an

attempt to push forward something innovative into the schools at all costs in order to reclaim political credibility for a Ministry of Education” (p. 9). It contained an implicit promise of development, but it was completely under-considered in respect of the implementation plan. With the new OBE approach, individual subjects were reorganised into eight learning areas, with general outcomes specified at Grade 9 level. Outcomes were prioritised above content (Jansen, 1998).

Jansen (1998) is scathing about OBE, and presented a tight set of ten reasons why it was a disastrous plan, which he then substantiated by referencing failures in other countries where the notion had been debated. His main point was that OBE just was neither practical nor possible, especially without extensive preparation and especially on the footprint of such profound dysfunctionality which characterised the South African education sector.

A number of other education policy decisions indirectly contributed to retaining inequalities within the sector. Even the provincializing of some core decision-making functions meant that some provinces landed up being advantaged while others not due to provincial inequalities. Chisholm (2003), Fataar (2008) and others identify a range of complexities that the former describes as contributing to competing interests that undermined a coherent and constitutionally aligned set of policies introduced in the immediate years of the post-Apartheid South Africa. These ranged from keeping old bureaucracies, neutralising the influence of the radical education-based activist movement of the 1990s, and the formulation of new advisory structures such as the NQF and the National Education and Training Forum (NETF), both of which organisations were driven by the needs of a neoliberal economy rather than the redress of socio-economic injustice as bequeathed by Apartheid.

In respect of implementing OBE, teachers in the system were totally unable to cope with demands, lack of resourcing, lack of time, lack of management support, assessment challenges, lack of baseline knowledge and skills among teachers - and learners - to handle the complete shift to OBE. The legacy crisis in education was far too great to accommodate this new approach in every respect. The result was a dramatic reduction in the quality of education. Basically teachers felt, and indeed were, abandoned, unsupported by the demands of the OBE curriculum. They had neither the training, the resources nor, most importantly, the experience themselves of a skills-based, critical thinking education. They were still faced with massive classes, in classrooms with broken windows, few textbooks, no libraries, no photo-copiers, no computers, no time – basically no access to the means to deliver OBE. Learners were profoundly disadvantaged, being left with huge gaps in skills and knowledge. OBE basically backfired on itself, but it took a full cohort of school goers to prove the disaster. Critics of the policy came from all quarters – from the Christian right to the academics, like Jonathan Jansen who were concerned with the impracticalities to the critics of its neoliberal character. A review was carried out in 2000, which led

to the approval of the revised curriculum in 2002 and its implementation in 2004, to be replaced in 2011 by Curriculum Assessment Policy Statements (CAPS) curricula.

Although the principles of being outcomes based and aligned to the development of a democratic social order that underpinned OBE were largely retained in the description of the RNCS revision, the curriculum was effectively a retreat back into a more conventional teacher-centred approach to education. It was described by the DOE as a curriculum that “aims to ensure that children acquire and apply knowledge and skills in ways that are meaningful to their own lives. In this regard, the curriculum promotes knowledge in local contexts, while being sensitive to global imperatives” (Department of Education, n.d., para. 1). The policy references “knowledge, skills and values necessary for self-fulfilment, and meaningful participation in society as citizens of a free country” (para. 1).

The big difference between OBE and RNCS is that the latter (and its later revision into CAPS), was based on the recognition that there was a profound mismatch between the ideals of education as “a rights-oriented, outcomes-based curriculum” (Chisholm, 2003, p. 2) for independent critical thinking and intellectual deep learning and basic requirements for literacy and numeracy, and that teacher training was wholly inadequate leaving teachers not remotely equal to the task. This was both an old legacy issue in multiple ways and a time issue – the legacy of Apartheid education could never ever be transformed by the idealistic recipe encapsulated in the OBE policy. Teacher capacity development both of existing teachers and prospective teachers would have to be addressed. The system as a whole required overhauling in a chicken-and-egg situation from teacher training to early childhood education, from foundational education to matriculation, from university education to teacher training, all within a dedicated system of resourcing, implementation, review and gradual highly managed transformation.

Ironically, although teachers themselves bore the brunt of the challenges of OBE, the most vociferous teachers’ union, the South African Democratic Teachers’ Union (SADTU) were fiercely vocal against changing OBE (Chisholm, 2003). A confrontational standoff between SADTU and the Ministry of Education ensued. The result of the highly politicised conflict was that the symbolic gains as represented by the expression “outcomes-based education” was that this element remained in the phrasing of policy defining RNCS. Chisholm makes an important observation regarding the way the decision-making that resulted in the revised RNCS policy prevailed. She notes the distinction within the structures of government between political and bureaucratic authority, noting that it was the former that prevailed in finalising the RNCS policy review. Chisholm describes the serious process of mobilising a large 150-person strong committee to review the process, made up of a range of stakeholders was implemented. In itself this represented a massive shift from the Apartheid approach to top-down policy development. The committee was made up of half departmental staff and half stakeholders from the education sector.



So, with RNCS and CAPS, content was once again given space above skills, and subject specialisation once again replaced the integrated approach of OBE – History and Geography were separated although they remained collated as Social Studies.

However, RNCS still left teachers (and other stakeholders such as education officials, parents and learners) feeling somewhat unsupported. This was likely the result of the same factors that bedevilled OBE - that they themselves did not have a good enough education for the increased demands of the new curriculum, which though still flawed, demanded much more quality than the pre-1994 years in all schools. In a review of the RNCS curriculum carried out in 2009 under the uMalusi banner, the findings suggested that while there was general support for the curriculum standards, there were still serious challenges, which included “teacher overload, confusion and stress and widespread learner underperformance in international and local assessments” (Dada et al, 2009, p. 5).

The report identified the need to communicate better to all education stakeholders what the overarching education vision was. Also, the need to streamline policy documents at all levels was identified, to ensure that teachers were able to identify exactly what was required of them in all learning areas both in respect of content and assessment requirements. The role of subject advisors was not clearly understood, especially in relation to what schools and teachers could expect from these experts. A major problem that was identified was the huge administrative burden that was required of teachers, who were already struggling to meet their teaching obligations. The review found that assessment was a major challenge that had not actually been resolved in the shift from OBE to RNCS, and this was an area that teachers, learners and parents were most confused by. Teachers were ill-trained to manage complicated continuous, formative assessment approaches, so progression became fraught with uncertainty. Reducing the number of subjects in the early years to try and improve performance was another recommendation, as was the official and formal reintroduction of textbooks into the classroom. Teacher training was the final area of review and the finding was that not only did teachers require better preparation for managing curriculum delivery in the classroom, but so too do support roleplayers such as school heads, subject advisors and district officials. The overall conclusion derived by the uMalusi review team was that the net result of an “underspecified” curriculum was that the advantaged were fine, but that the disadvantaged became even further undermined and that what was necessary was “Certainty and specificity about what to teach and how to teach [as] it will help to restore confidence and stability in the system, and enhance the learning opportunities we provide for our students” (2009, p. 61). The recommendations were largely implemented into the CAPS programme, which was introduced into the system in 2011 and still defines how schools deliver on their mandate currently.

CAPS provided much greater curriculum planning support to teachers, by specifying exactly what should be taught in each subject, in each term and in each year, with the provision of basic teaching resources easily accessible on the DBE website portals. In 2014, uMalusi commissioned a further study that compared the RNCS and CAPS curriculum. This quite comprehensive exercise was carried out with the collaboration of over 70 subject experts against a set of criteria that had been defined to examine the appropriateness of the CAPS curriculum in the South African context (Grussendorff, Booyse & Burroughs, 2014). One of the key findings was that there had been a systematic retreat into a much more traditional approach to education, significantly different to the OBE vision, “the shift has been towards a much more technical and traditional approach toward teaching and learning, in which the more far-reaching aims of education for a living democracy have taken a back seat” (p. 15). An overall finding of the review, was that while many of the shortcomings of the previous RNCS had been addressed, it was important for education reform to “slow down” and allow stakeholders to consolidate gains without facing any further systemic changes. An old concern was also tabled again: how to translate the policies and guidelines and ideas into under-resourced classrooms.

From a policy perspective, the curricular shifts from OBE to RNCS to CAPS has been a curious ride from the radical socialist idealism and excitement at the overthrow of a draconian and grossly inhumane political system that defined all life including education, to the sober reality of maintaining a political economy that was integrated into a globalised capitalist world economy. There has been a clear capitulation of liberation education to one geared at feeding the needs of a neoliberal political economy.

#### Other factors pertinent to understanding education in South Africa between 1994 and 2021

One other policy that is relevant to the discussion of education in South Africa, specifically with regard to the potential impact that making History compulsory may have on South African school leavers, relates to access to tertiary education.

#### University admission points

All tertiary learning institutions in South Africa admit students on the basis of their performance in their secondary school exit assessments (DHET, n.d). Admission Point Scores (APS) are awarded against marks received for core subjects studied, the higher the mark the higher the point value. Points are awarded for six out of seven of the range of recognised National Senior Certificate subjects. Currently Life Orientation is a fundamental (compulsory) subject for FET but does not render points to the APS, as it is defined as a 10-credit subject. All other subjects have a total credit value of 20. The score received in the exit examination will determine how many points out of 20 the learner will receive per subject. To achieve a provisional university entrance, or bachelor’s pass, matriculants must achieve a minimum

of 23 points. Any score lower than this will enable learners to enrol at Universities of Technology (19 points) or Training and Vocational Education and Training colleges (15 points) (DHET, n.d.; Petersen, 2020). While the level pass will gain you a provisional entrance, it remains the prerogative of the different tertiary institutions award different access points per discipline. For instance, many courses require a certain number of points for mathematics to gain acceptance.

The relevance of this regulation to this enquiry is the fact that if History were to be made compulsory, it could very well impact negatively of the capacity of matriculants to gain the points needed for their choice of study, and therefore for their career paths, impacting on economic freedom and contribution of citizens to the national economy.

#### Teacher Unions after 1994

Chisholm (2003) points out that teachers' unions play an important role in South Africa. The biggest of these unions, SADTU, has exercised its power on many occasions since 1994 by bringing education to a standstill. The union has attracted controversy over the years, and remains a powerful lobby group. In the context of this thesis it bears noting that the compulsory History proposal began with an approach made by SADTU to the Minister of Education in 2014. Ironically, teacher unions in South Africa are still in 2021, largely racially representative. SADTU is the biggest union by far, followed by National Professional Teachers' Organisation of South Africa (Naptosa), with the Suid Afrikaanse Onderwysers Unie (SAOU) coming in third.

Formed in 1990, by 2014, SADTU had over 260 000 members (Kumalo & Skosana, 2014). This number has remained more or less constant. The union is extremely influential, even powerful, in the education sector. While its focus has always been generally on workplace issues, it is a highly politicised organisation that has historically taken a stand on multiple issues to do with anti-oppression and the furtherance of the ANC-led democratic movement. It has historically had a close association with government, and "defined itself in opposition to the existing racially-based professional associations as being concerned with issues wider than the narrow workplace and salary concerns of these associations" (Chisholm, 2003, p. 7). In a history of the organisation written in 2014 by Kumalo & Skosana, they write "In this booklet, the compilers seek to highlight the role that teachers and SADTU have played in the struggle for equal education, as well as in the political liberation of the nation" (p. 10).

In its early years, SADTU used tactics of strikes, stayaways and other forms of mass action to assert its position (Amoako-Gyampah, 2014). This pattern gave them considerable power, and they used it increasingly over the next decade or so, to gain more and more benefits for the membership from salaries, to working conditions to influencing educational policy. By 2013, they had become quite a

formidable force, and was by then in as much dispute with the ANC government as they had been with the last throes of the Nationalist party government. Munsamy (2013) reports on an imminent “showdown” between SADTU and Minister Motshekga in mid-2013 which was essentially focussed on an assertion of their right to strike by challenging the government’s attempt to proclaim teachers essential workers. The conflict had arisen due to the extensive strike action in previous years and the national concern from multiple quarters that this threatened an already fragile education crisis in the country. SADTU appeared not to be taking heed of the concern. Basically, won this battle, giving more flex to their muscle. By 2017, Davis opens an opinion piece on SADTU saying, “No trade union in the democratic history of South Africa has attracted as much criticism as SADTU” (para. 1). The article goes on to quote the Volmink Report, commissioned by the government that noted, “Six and possibly more of the nine provinces are where SADTU is in de facto charge of the management, administration and priorities of education there ... “undue influence” is endemic to greater and lesser degrees in the entire education system” (para. 12). Masondo (2016) writes about the hold that SADTU has on government, noting that this partly comes from the fact that SADTU has widespread membership and its members sit in almost every ANC branch. He notes that paid up members of SADTU occupy positions in the DBE. It is clear that SADTU’s influence on South African education – from policy to positions – cannot be underestimated.

#### A snapshot of the current picture of education in South Africa

Education remains a site of gross inequality in South Africa. Pinar describes education even in post-Apartheid South Africa as, “A black aspiration and a white reality” (2010, p. 9). Aside from this representing a failure of the post-1994 government to address this systematic inequality through rigorous policy design and implementation, it has the knock-on impact of replicating and sustaining socio-economic and political inequalities that characterise South Africa today. This is unlikely to change any time soon, although new ways of understanding problems may yield policies that are more likely to improve rather than compound an already complex and challenging political economy. It follows that a country that educates its children properly provides them with at least the potential to enter the economy, to escape the traps of intergenerational poverty and dependency.

In a study published in May 2018, the Institute for Race Relations provides a snapshot insight into the state of education in South Africa. Covid aside, the picture is not likely to be significantly different in 2020. (Roodt, 2018). Roodt records that most children entering Grade 1 will not complete their matriculation year. He reports on an Organisation for Economic Co-operation and Development (OECD) study that ranked South Africa 75th out of 76 countries for the worst education system, compounded by that fact that South Africa came in last out of 39 participating countries in the 2015

Trends in International Mathematics and Science Study. In respect of reading and literacy the picture is equally bad. He notes that approximately 78% of South African grade four learners could not read for meaning, compared to 4% internationally. Roodt makes the point that although national scores are very poor overall, there are regional differences and massive differences depending on the type of school that pupils attend. Performance is directly linked to resourcing. This is a direct hangover from the Apartheid years. Roodt notes that it is still true that academic achievement is largely the preserve of affluent families whose children go to quintile five (well-resourced) schools. The majority of these are White learners living in suburbs that are still mainly White.

Under-resourced schools still want hopelessly for basic services. The tragic scandals of South African learners attending schools with no sanitation facilities continues into 2021, even in a time of Covid. Essentially, the status quo in the education sector has not really changed all that much since the Apartheid days, where these inequalities were legislated as part of the Christian National Education and Bantu Education Policies. Now they continue because policy and implementation have still not caught up with the profound underdevelopment that was implemented by design under Nationalist Party decree.

In a study carried out by Amnesty International (AI) in 2020, the gross inequalities within this sector across socio-economic classes and quintiles, across provinces and across the urban-rural divide. As well as the factors named above, AI indicates that overpopulated classrooms, poorly trained teachers, inadequate learning resources and reduced actual teaching time are compounded by grossly inadequate infrastructure provision as well as safety and security and transport are major challenges that fundamentally undermine the quality of education in South Africa.

The Covid-19 pandemic has massively exacerbated the scenario. In an article published by the Human Sciences Research Council (HSRC) in December 2020, “School closures affect students, teachers and families and have far-reaching economic and social effects. This is especially so for fragile education systems and the negative effects will be more severe for disadvantaged learners and their families.” (Reddy, Soudien & Winnaar, 2020, para. 3). They go on to detail how much easier it is for children of resourced homes to access the internet and therefore online learning platforms, and how this is impossible for children of the poor and economically or geographically marginalised. This applies from the youngest pre-school child to the university student.

The reasons for the failure in addressing the education crisis in South Africa are as complex as the subject itself, with its peculiar history. Cameron and Naidoo (2016) put forward the following points to explain how what looked good in policy has not delivered in practice. Firstly, they say, there is a deep disconnect between political imperatives (expressed in policy) and the institutional base at the

operational level. Policy was too idealised for it to be possible to implement it, i.e. policy was not practicable. They go on to report that the strength of the labour movement in education undermined the achievement of identified goals, as the government was drawn to focus much energy on resolving working conditions of teachers, rather than focussing on delivery of education outputs in the classroom. Associated with the previous point, Cameron and Naidoo describe a top-down approach to implementation, i.e. national government imposing policies on provincial government who require that districts implement them, is unrealistic and will inevitably result in a patchy and unequal implementation. More efficient lower levels (provincial and district) will implement better than less effective areas. This means the whole delivery success is undermined.

Adding to these challenges, Jansen and Taylor (2003) draw somewhat similar conclusions, although they acknowledge the important gains that have been made. They focus on education finance reform, curriculum reform, and the teacher rationalization process, pointing out that despite the prevailing inequality in education, there have been significant improvements since 1994. These include a massive increase in enrolment across the grades and better, more equal provisioning for less resourced schools in respect of infrastructure and teachers. They note that major challenges remain in the area of implementation of policy at the level of the classroom, and that three focus areas will be required to address ongoing challenges. These include an integrated approach to the system of education provision; the review and redesign of management systems that are tasked with implementation; and consistent monitoring and evaluation of what is working and what still undermines success. Jansen and Taylor propose that management systems must not be passive implementers of orders from on high, but must be active agents of change; and that a system-wide approach to reform would allow the monitoring of what actually happens in different areas in relation to reform initiatives, and enable a responsive management of different factors as they emerge. Finally, they say that it is critical to ensure that change is felt at the coal-face, specifically in the classroom.

The consequences for socio-economic and political development of the education crisis in South Africa is not directly the subject of this thesis, however it forms a critical context within which to examine current educational policy. It enables me to deeply consider the question: What does a critical examination of the proposed compulsory History policy process of the past six years reveal about how the current government understands the issues facing South Africa as illustrated by its policy choices?

With a broad-strokes picture of what is happening in South Africa currently in general and within the education sector, it is useful to bring the lens specifically on to how History education in schools has occurred. It is a statement of the obvious to point out that the path of History education has been directly aligned to the path of education in general – both under Apartheid and after 1994.

## History Education in South Africa

As a subject, History is presently being hammered from all sides all over the world, buffeted by forces that want it to become national litanies and others that say it is irrelevant to the demands of a 4IR modern economy, while a much smaller band of people call for the necessity of historical literacy for the protection of democracy (Daley, 2018; Kohn, 1989; Martin, 2019). In South Africa we are having it twice as hard, as the state debates whether this subject should be compulsory, in a context of extreme budget constraints and a failing education system. The compulsory history proposal has been sporadically deliberated in a Ministerial task team for nearly five years. They have submitted a recommendation that History should be compulsory from 2023. It is unclear what the team is doing presently, although they remain in place with a terms of reference to revise the History curriculum in line with their 2018 recommendations. While the proposal is being already looking at implementation, it is yet to be formalised as policy. History teachers (and teacher training institutions) must be awaiting in awe of the significant burden of responsibility that appears to be looming on the horizon.

### *History education under Apartheid*

Bantu Education and Christian National Education have been discussed earlier in this thesis. As a reminder, a key purpose of these policies was to persuade Black and White South Africans that the order of Apartheid under a free market economy was legitimate and desirable. Through these policies all subjects were organised to bolster White hegemony and control of the economy and Black servitude and provision of cheap labour. History was a crucial subject in this plot and played a pivotal role in the reproduction of a set of norms aligned to the Apartheid strategy. It is important to examine both the syllabi and the supporting textbooks that articulated the detail. It is in the syllabi that the voice of power is at its bluntest.

The History syllabuses of the Apartheid era were thin, focussing largely on national history and key world events and referred teachers to textbooks (Rehman, 2008). There were different syllabi for Black and White learners, framed as part of either BE or CNE. The syllabi required that History teachers present the official story as per the textbooks and they even highlighted the need to explain policies of the day, such as the new policies after 1948. Rehman's research presents clear evidence that the CNE syllabus highlighted the superiority of Whites, and the BE syllabus emphasised obedience in general and especially to figures of authority.

The stories told and the textbooks published told a "whitewashed" tale of European Saviours and the Primitive Natives. Great chunks of the southern African story were disappeared, effectively silenced.

History basically began in 1652<sup>9</sup> with the arrival of Jan van Riebeeck. Black History was described in cultural terms, where Black people belonged to scattered and warring tribes lead by fierce warriors. No descriptions were made of the complexities of the different communities living all of the territory: no political systems, no social systems, no economic systems, no shifts and changes in interactions. Rather, they were presented as people who needed to be civilised by the Europeans (Rehman, 2008). White people on the other hand, were described in detail: from Europe, to the establishment of the Cape of Good Hope, the great Great Trek, the establishment of the independent republics after the subduing of Native Tribes, the Anglo-Boer War, the Union of South Africa, the Republic of South Africa, the economic hub of the continent. With this narrow, select completely uncritical narrative, BE and CNE were able to persuade generations of learners of their destined place in the South African society under the Apartheid government. In this way, a kind of historical consciousness was constructed to justify the present, and reproduce a view for the future. Rehman quotes Staffen Selander when he says pedagogy:

*...is not only a tool for teaching, it is also a bank for communication and knowledge. The pedagogic text serves as a tool for learning, as sources of information but also as social memory. Textbooks constitutes the place where we have placed such facts, explanations and examples which we see as fundamental, valid, objective and necessary for our common social and cultural orientation.* (2008, p. 11).

Manipulating pedagogy and textbooks especially, allows the state to reproduce its own agenda at a popular level. The content of History textbooks is illuminating in this regard. Again, using Rehman's research, we see that a popular History textbook of the time, *Legacy of the Past*, describes the work of Sir George Grey as follows,

To remove ignorance he had schools built, e.g. an industrial school at Lovedale where young Xhosa could be taught trades and better methods in agriculture. To discourage idleness and to teach them the dignity of labour the Xhosa were used in the construction of roads and public works. To combat superstition a hospital was built at King Williams's Town where it was hoped the tribesmen would learn the benefits of the white man's medicine. This would help to destroy the power of the witchdoctor and superstition. Missionary work was also encouraged. To assist in his policy of civilizing the Bantu he encouraged immigration into British Kaffraria. He hoped the Xhosa would learn industrious habits from the European settlers. (2008, p. 18).

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<sup>9</sup> Rehman (2008) reports on a common South African Textbook used extensively in schools during Apartheid, where the first mention of Black people was in the context of Sir George Grey in 1854, implying by omission that there was no long history of Black people in South Africa before then.



This extract is typical, but it is likely that the textbook would have been used in White schools<sup>10</sup> rather than Black schools, which likely had no textbook at all, only teachers who themselves would have had a deficient access to knowledge and information during their training, or who would have read texts such as *Legacy of the Past*.

In his research, Rehman describes the general approach in a number of other textbooks of the apartheid era, basically noting that the trend reproduces the same stories, emphasising the absence of any Black history at all, the civilising influence of Europeans (later Afrikaners), especially men, the unsophisticated unintelligent Blacks who need the civilising influence of wage labour and the God-given duty imposed on the Nationalist Party to lead South Africa to greatness.

By the 1980s, after the unavoidable influences of the June 1976 uprising and subsequent decade of resistance inside and outside of South Africa, changes became apparent in all areas of South African life. The state became more vicious in its repressive practices, but the cracks by then were too great, and growing. Opposition forces both inside the country across the political spectrum, from teenage protestors making schools ungovernable to trade unions to the faith-based community, and outside the country, including the sanctions movement, rapidly eroded the mythology of Apartheid. Even new textbooks squeezed their way into the education system. Obviously international trends also added to a new pedagogic influence that saw debate and a broader view of education start taking hold in universities and schools, albeit the more privileged schools. School History in South Africa too was affected by these changes.

Rehman references Peter Kalloway's History textbook series, called *History Alive* that consciously brought in a wider narrative, away from the Great Man in Africa trend. Rehman quotes Kalloway who says in his introduction that the new series is "a move away from a parochial view of historical events and processes and examine them against a background of social, economic and political change on a global scale" (p. 22) criticising earlier text books for having "largely neglected the rich tradition of African and revisionist history that has informed and enriched the understanding of our history in the past two decades" (p. 22). In addition to Kalloway's contribution to a new type of History textbook, there were also others presenting similarly alternative resources. Siebörger (2000) describes the work of historians writing alternative texts about South Africa, and the work of the "National Education Crisis Committee [NECC], which had in 1987 published a 'People's history' for use in schools... Not only was their content different [to that of Afrikaner Nationalist texts], but they also espoused a skills-based,

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<sup>10</sup> This is the textbook I was given as a learner in South Africa during the Apartheid years.

discipline-led pedagogy” (p.1). Of course, these alternative texts were seen by relatively few learners, but it was a start on which to build after 1994.

The engineering of the historical narrative by the organs of state to serve the interests of the Apartheid government is incontrovertible. Of course, this is not the only narrative that people were exposed to. There is a wealth of information that tells an altogether different story. The literature, music, visual art, performance art that thrived in the Apartheid years in South Africa had a powerful impact on communities and upon the trajectory of history. This body of history is not the subject of my thesis, but it should mitigate the notion that *the state has total power* over the “hearts and minds” of the people. To avoid a simplistic analysis requires that we be reminded from time to time of the complexity of the human experience. The above discussion about History education in South Africa during Apartheid aims only to make one point: the Apartheid state had a powerful impact on how South Africans saw themselves and others through its manipulation of education and specifically History education through what stories were told and what stories were not told.

This was not entirely different in the post-Apartheid era, although the imperatives and the stories were.

#### *History education since 1994*

There can be no doubt that, more than any other school subject, History was a good place to try and achieve the objectives of the ANC’s Manifesto on Values, Education and Democracy. Even in the few years before 1994, with the winds of change clearly blowing, the growth in popular anti-Apartheid politics inside the country was impacting on all aspects of life, including formal and informal education. Siebörger (2000) notes in particular the convening of History conferences and colloquia – such as the three of each held in 1992 and 1993 - as an important influence on the likely trajectory of curriculum development in this subject, including with regard to both content and skills. Siebörger notes that there was common cause at these exchanges of History professionals that whatever content the proposed History curriculum contained, it should align with the new constitution and the Bill of Human rights, that it should be inclusive and promote democracy. There seems to have been an open and enthusiastic agreement between politicians, academics, teachers and other commentators on the subject that with the end of Apartheid a new History could and should be told; and that this History would contribute to the development of democracy and Human Rights in the new South Africa. In many ways the onus was put on History to do a great all-encompassing task of creating a new identity for South Africans by telling different stories. The irony regarding the politicisation of school History was not a common conversation topic at the time.

Bertram, in her analysis of the “shifting discourses in the South African school history curriculum” (2020, p.1), usefully identifies the following basic trends in the period 1990 to 2019):

- During the Apartheid era, the focus of state-mandated History was on the fact-based narrative of places, dates and names that told a Eurocentric and Afrikaner-centric tale of human (mainly white) development.
- In the years just before and after 1994, in accordance with the Interim Core Syllabus, there was a shift to actively removing racist and sexist inferences in the whole education curriculum. The History curriculum expanded the reach to be inclusive of African and Black South African stories, but traditional narrative approach remained more or less the same. Given the past narrow curriculum, there was an urgency for revision, and a great deal of discussion and debate during this time in academic and NGO circles, in an effort to tell a different story.
- Curriculum 2005 and OBE unexpectedly disappeared History altogether by combining it with Geography into a learning area called Human and Social Sciences. In the outcomes identified to guide teachers, there was almost no content indicated, but a significant emphasis on abstract concepts, as Bertram says, there was a strong “desire for learners to understand inequality, struggles for land, resources, for decolonisation and liberation” (2020, p. 9).
- In 1999, a review of OBE (and its failure) championed by the new Minister of Education, Kader Asmal, led to major changes across the sector, and for History this meant resurfacing it as a subject. Once again History was made distinct and content was prescribed along with historical skills development. Clear themes to address issues such as Human Rights were defined. This was packaged in the RNCS and presented to schools in 2002. Bertram (2020) notes that while there was change from the OBE curriculum, it remained outcomes based, which was the organising principle of the curriculum reconceptualisation.
- In 2009, RNCS was reviewed under the eye of the current Minister of Basic Education, Angie Motshekga. The limitations of RNCS have been discussed earlier, noting that the RNCS were found to be too unstructured and provided inadequate support for teachers. The review culminated in the CAPS. What this meant for History was that it resulted in a reversion back to an instructional, narrative-based, chronological approach to History education. Historical skills are still very present, albeit in a highly prescribed manner, and there is still a stated objective of contributing to the building of a national narrative.

The above summary of the “phases” of the History curriculum show a trend that gets closer and closer to building more nationalism (or at least a national African identity) than building critical skills implicit in education for democracy. What follows is a more detailed examination of the “phases”.

Rehman (2008) uses a new History textbook published in 1992 to make the point that the “official” narrative changed completely from the one messaged in the Apartheid textbooks. In this telling, the White people from Europe arrived in Southern Africa and systematically over three centuries appropriated the land previously owned by Black local people. Power struggles between different groups of people are a big part of the story, be they over land, resources or political control, or all three. Aside from the texts mentioned by Rehman, there were a number of new textbooks that became available to History teachers. Not only did they tell a much bigger and more inclusive story, but they also introduced a range of historical skills into the pedagogy of the subject. Primary sources were presented along with multiple perspectives. Source analysis became an important part of the classroom practice. Bringing in specific histories was also introduced – women’s stories, resistance stories, social histories that brought the arts into the History classroom. In theory, History just became a lot more interesting for teachers and learners. In practice, this ideal was likely only applicable to a small minority of usually well-resourced schools serving the usually white population.

The expectation placed on education in general and History education in particular was grossly unrealistic in post-Apartheid SA. There was simply not the capacity and infrastructure and leadership and time to execute the task. In a sense it was easier for the Apartheid government – their target group was relatively small and relatively homogenous – the effort was in CNE schools. BE just had to not educate to achieve its aims. That was easy to do through neglect. The post 1994 government had a massive and an altogether more complex task, with hundreds x the numbers, limited resources (financial and human), and a grand and idealistic plan – not only to do but to undo. Almost all education had to be done differently, immediately.

Added to this was the conundrum of exactly how to tell the South African past, with all its trauma. Maluleka Paul quotes Cole and Barsalou, “In societies recovering from violent conflict, questions of how to deal with the past are acute, especially when the past involves memories of victimisation, death, and destruction so widespread that a high percentage of the population is affected”. (2015, para. 1) Tibbits and Weldon (2017) raise the concerns that teachers were (and are) not trained to deal with trauma in the post-Apartheid classroom. Doing History critically may have sounded much easier than it actually was in practice. It is no wonder then, that the first years after 1994, History teaching in South Africa was confused into oblivion.

With the new OBE approach, individual subjects were reorganised into eight learning areas, with general outcomes specified at Grade 9 level. One of these learning areas was Social Studies, made up of History and Geography. According to one commentator, History was “merged into a conglomerate

with Geography as a Human and Social Science learning area and thus essentially vanished from the curriculum” (Harris, 2018, p. 11).

In August 2001, Kader Asmal, Minister of Education at the time, welcomed people to the launch of the South African History Project (SAHP). This structure was in line with the review of education taking place at the time. In his address, he noted the importance of History as a school subject, but also reported on the findings of a group appointed to examine the state of History teaching in 2000. These findings were alarming (and are still relevant in 2021). In summary the six points shared include that History teaching was largely of a very poor standard, delivered as an uncritical chronology of dates and facts. Teachers were typically using old, Apartheid era textbooks and resources. Content and pedagogy were reminiscent of Apartheid era History classrooms. Teacher skills were extremely limited. The post-1994 decision to combine History & Geography into one subject – Social Studies – had effectively rendered History invisible, ineffective and parochial. Finally, History was deemed unimportant – by pupils, parents, schools, administrators – and having no vocational value.

In the rationalisation of the school curriculum according to OBE, ironically History had been side-lined. Some, like Paul (2015), claim that this diminishment of History was because it was too difficult to think how to present History at that juncture. The irony lies in the notion that if historical skills are introduced into History classrooms, this could very well result in the empowering of learners to deconstruct the chronological narratives of traditional History teaching. He quotes Weldon as saying that “avoiding the past in the curriculum allowed for the expression of new values and a national identity located in a vision of an economically prosperous nation” (para. 17). The review of OBE that happened in the early 2000s recognised the weaknesses including the profound human resource deficits.

The Revised National Curriculum Statements (RNCS) was the result of this review. History was rescued from oblivion and reintegrated into the curriculum, although it was retained as part of the Social Studies Learning area (Harris, 2018). The prescribed RNCS for History published in 2003 was openly political in its commitment, and stated as the purpose of History, “A study of History builds the capacity of people to make informed choices in order to contribute constructively to society and to advance democracy” (DOE, p. 9). The document commits to foregrounding historical skills, and being inclusive of especially historical narratives that had previously been marginalised, in an effort to build democracy and promote a culture of Human Rights. Paul quotes Chisholm as saying that what now happened was that a History curriculum was created that “was an official history which aimed “at permitting the unofficial, the hidden, to become visible” (2015, para. 23). Harris reports that a National History Commission was also established to strengthen History teaching in schools. Bertram (2020) notes that the History curriculum for the FET band was organised around a historical awareness and the

engagement with key concepts to address questions such as, “How do we understand our world today? What legacies of the past shape the present? In understanding our world today and legacies that shaped our present, the broad themes of power alignments, human rights issues, of civil society and globalisation” (p. 16). With the RNCS review and the implementation of CAPS, the History curriculum, according to Wasserman quoted by Bertram, had become “a new official master narrative and hence a new official memory, based on an imagined new nationalism and identities” (2020, p. 18). Tibbitts & Weldon (2017) claim that despite History being brought back into “service”, and being accorded a particular role in contributing to the development of democracy, it was “compromised” by various factors, including unequal schools, variable teacher capacity and limited classroom time allocation and lack of any kind of support for teachers to carry out the “new” curriculum, both the content and the skills. Teachers were thus ill-prepared to take on such a heavy responsibility. No associated training was provided for existing and prospective teachers. Nor were the inequalities between different schools factored into the implementation plan of the new history curriculum. What Tibbitts and Weldon do not say explicitly, is that the project was doomed to failure.

In respect of content and methodology, History teachers had to rely on what was available. A number of new textbooks were published that responded to the new curriculum, and the various commissions and other academic initiatives that merged generated new material, but these seldom found their way into the less resourced schools. The DBE provided some resources via their website. The internet was also there for those with access and skills. However, in the main, History teachers simply had to use what they had, to the best of their abilities. This often meant defaulting back to what they knew from their own education and using old textbooks from the previous era, thus uncritically delivering a confused and confusing historical message.

The new content was (and is) difficult. The new skills approach encouraged discussion and debate. History teachers have had to struggle with the management of difficult, often traumatic, stories in their classrooms. Most teachers are not suitably skilled. Tibbitts and Weldon speak of the need for teachers to have specialised skills in managing classrooms in a post-conflict, and still tender, society. Siebörger (1993) tells of the experiences of teachers who are faced with having to manage rage and confusion from learners who are horrified by the Apartheid narrative, or who still “live in shacks, but they don’t know why” (p. 5). Nussey (2018) speaks of the need for History teachers to be exposed to ways of integrating issues such as *ubuntu* and reconciliation pedagogy along with empathy, critical thinking and multi-perspectivity, none of which are part of general teacher training.

The challenges facing History teachers after 1994 resulted, according to Masooa and Twala (2014), in History becoming increasingly side-lined, even discontinued, in many schools, seen increasingly as

“irrelevant for the job market” (p. 2308). This despite it being mandated by government to carry the lion’s share of social transformation. In 1995 Kalloway had warned that History teachers were likely to lose heart because of the “Magnitude of the task and the multiple challenges to be confronted” (p. 64).

In 2014, after seven years of social discontent and public protest, the idea of making History compulsory was tabled, to ensure that it did carry out its mandate.

*The proposal to introduce History as a compulsory school subject.*

As described earlier, the post-1994 period was challenging even if it was exciting. The end of political Apartheid did not bring economic freedom, not then and not now. By 2007-8 the country was beleaguered by service delivery protests, strikes, and outbreaks of gruesome xenophobic violence in various parts of South Africa. After 2010, anti-government sentiment flared, and radicalised. Julius Malema, expelled by the ANC, formed the EFF in 2013, and rallied large numbers with his racially inflammatory and aggressive rhetoric, which found much support amongst youth and those who were disillusioned with the ANC. In 2013-14 xenophobic violence flared again. In 2015, the decolonisation movement coupled with the anti-colonial #Rhodesmustfall, and with it, the #feesmustfall movement, became extremely vocal. The atmosphere was charged – Wasserman (2017) quoted Foster saying that the rise in anti-government sentiment “Was rooted in pan-African rhetoric” (p. 67). This has continued on and off in varying levels of intensity since. In the face of their inability to deliver on the socialist promises of the anti-Apartheid struggle, the government of the day must have been alarmed, and needed to consider tactics to contain the spread of these revolutionary and radical ideas.

At the time, the teacher trade union, SADTU, petitioned the DBE to take steps to make History compulsory. As reported by TimeLive in June 2014, SADTU deputy general secretary Nkosana Dolopi said “[the youth] “have to understand the past to build a stronger future”. He said history was prioritised in most developing countries such as Cuba. The current curriculum, he said, placed too much emphasis on European history instead of “local heroes and heroines and their struggles” (Louw & Davids, para. 6). Soon after this, SADTU published a paper on their website that speaks to the importance of History as a vehicle to teach values, identity, heritage, national pride, emphasising the need for the content to be specifically South African, especially focussing on national heroes and heroines. The document ends,

*SADTU believes that the South African history should be made compulsory in our basic education curriculum, told by the lions themselves about the stories [they] witnessed in the forest of the past South Africa, not through research of settlers to glorify their own. This history should be taught in conjunction with our democratic Constitution that seeks to build a South Africa inclusive of everyone who lives in it, Black and White. This history should be taught to*

*advance nation-building, the healing of the wounds, bridging the gap of the South African rich and South African poor, so as to realise a developmental state, able to compete in a globalised world.* (n.d. p. 7)

In addition to the petitioning of SADTU, the Ministerial Task Team Report on the National Senior Certificate was presented to the DBE May 2014. Wasserman (2017) sees this report as a “catalyst” for the process that unfolded to propose History as a compulsory subject. He suggests that the report made recommendations about the role that History could play in building citizenship. Wasserman quotes a number of other politicians making the same kinds of inputs, such as Minister Lindiwe Sisulu and Judge Thami Makhanya, both of whom made pronouncements about poor social behaviour and a lack of historical knowledge. The latter is quoted as saying, “The problem is that the youth of today do not know where they come from ... Nelson Mandela is fresh in his grave yet some ignorant youth say the past of this country did not affect them so they do not care what happened then” (Wasserman, 2017, p. 65), the solution to which he says is compulsory History from Grade 8 to Grade 12.

A month later in July 2014, Minister of the DBE, Angie Motshekga, presented to parliament the plan to investigate the idea of making History compulsory. In her presentation she indicated that she had already had experts looking into the matter and that, “Research so far had shown that as a subject, history has a number of positive effects such as contributing to nation building, national pride, patriotism, social cohesion and cultural heritage” (M&G Staff reporter, 2014, para. 3). This statement sets the scene for what the priority aims are of the plan.

Since the first public notice about the DBE proposal to investigate introducing compulsory History at FET level schools, there has been reaction, mostly questioning and critical. Criticism ranges from the sheer logistical challenge to fears of indoctrination to concerns regarding a nationalist trend implicit in the subtext of the recommendations. Despite the volume of criticism, according to the HMTT, in their consultation process there was support for the idea from teachers in some areas. What follows is a summary of some of the different perspectives.

As mentioned above, SADTU wrote an impassioned document strongly articulating a case for making History compulsory. They tied their reasoning to the need to build patriotism, to ensure that History content was revised to reflect African History (especially to counter the waves of xenophobia sweeping the land), to tell the stories of great struggle heroes and make sure the South African youth know “our real story” (n.d. p. 5).

Linda Chisholm (2018) raises serious concerns about the capacity of the universities to meet the demand for teacher training that will be required should the proposal become policy. She notes that universities



and training institutions have had their budgets cut over the past decade at the same time there has been a significant increase in student numbers. She is also worried about the quality of prospective History teachers, noting that most Education faculties do not require that those taking History education courses as part of their teacher training to have studied History previously. This point aligns closely with other critics such as Bailey who lament the profound lack of History content knowledge amongst History teachers.

Noor Davids (2016) suggests that the reason for the proposed policy is largely political, put forward to manage a growing lack of patriotism amongst the youth especially, against a backdrop of xenophobic violence, and public protest such as the #must fall movement and service delivery strikes. He makes the connection bluntly, “After twenty one years of democracy, South African society lacks social cohesion, a sense of nationhood and is experiencing occurrences of xenophobia. To address these concerns, the Department of Basic Education (DBE) established the History Ministerial Task Team (HMTT) to oversee the implementation of compulsory History in the Further Education and Training (FET) phase” (p. 84). He raises a concern about the process that resulted in the compulsory History proposal, agreeing with others who have questioned the validity of the process. Noor Davids is critical of the MTTT that due diligence has not been carried out in their work to validate the proposal, and suggests that the scale of the proposal needs to be measured properly by gathering appropriate data at a nation-wide level such as numbers of History teachers, number of schools offering History, learners signing up for History, as well as an assessment of the Life Orientation citizenship programme. Noor Davids also reminds us that there is a common view that the purposes of History have often been defined as political, academic and educational.

Within Parliament, the Democratic Alliance has been vocal in its concern that the proposal runs the danger of being used for ideological indoctrination (Noor Davids, 2016; M&G, 2014; Monama, 2015).

Mumsy Malinga, a high school History teacher, acknowledges the high value of the subject given how it provides people with a sense of their own heritage and critical insight into the present, but she makes a strong case against making the subject compulsory on the grounds that it contradicts the individual’s right to freedom of choice, a key principle of democracy. She challenges the notion that nation-building should be the responsibility of History teachers saying that it would force teachers to have to tell a particular narrative (Ndlovu, Malinga & Bailey, 2019).

Maryke Bailey is a History academic, a school History teacher and an education journalist. She has presented strong views against making History compulsory on several platforms (Bailey, 2018a; Bailey, 2018b; Ndlovu, Malinga & Bailey, 2019). While highly vocal about the high value of History, Bailey claims there are insufficient compelling reasons presented to extend the compulsoriness of the subject

to the FET level. She claims that different and/or less costly alternatives to achieve the same results have not been explored, although she is troubled that there is insufficient clarity as to what those results actually are. Bailey is very concerned that learners, already struggling with serious educational and learning deficits, will find the struggle even harder with the burden of an extra compulsory subject. Bailey questions the logic of putting money, time and effort into a new subject, rather than enhancing the existing suite of subjects, especially in a context of high educational deficits.

In another article (2019), Bailey contends that there could well be unintended consequences flowing from such a policy should it be promulgated. For example, even if it was not intended, History classes would likely be sites of propaganda dissemination. She raises a serious disquiet about the functionality of the education system as a whole, claiming that adding a new compulsory subject would over-burden the ailing system even more. She notes three aspects of teacher performance in the History classroom that demonstrate this – lack of content and concept knowledge, lack of teaching skills and lack of time to improve the former two that would only be worsened by making the subject compulsory. Bailey adds that most teachers themselves do not have critical thinking skills, making it impossible for them to impart the same to their learners.

Bailey also notes serious inconsistencies in the process of investigating the desirability of a compulsory History policy, with two main objections. Firstly, that the overall recommendation to make History compulsory does not in fact flow from the HMTT report findings in respect of international trends, “the task team actually misrepresents its own findings” (2018, p. 1). Secondly, that the HMTT did not investigate whether making History compulsory was a necessity, or even desirable, but rather how this could be implemented, assuming the decision to have been already made<sup>11</sup>. She concludes that the whole investigation that took so long did not get around to explaining the necessity for compulsory History.

Van Eerden and Warnich (2018) do a detailed critique of the HMTT report, noting the keen expectations of the research from the fraternity of History educators. In a step-by-step examination of the report, van Eerden and Warnich find it wanting, and not sufficient to be used as evidence or reliable data to conclude that History should indeed be made compulsory. Like Bailey, van Eerden and Warnich feel that the case made by the HMTT is not compelling at all and makes a limited case for the need for compulsory History. They are highly critical regarding the exclusion of History teaching expertise in the HMTT panel, and the exclusion of the youth and parent body from the consultation process. They

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<sup>11</sup> While the HMTT could have responded differently, that they made this assumption could be ascribed to the Terms of Reference that defined the ambit of their task.

conclude that much more specific research needs to be done before such a momentous decision is arrived at.

Mduduzi Mbiza (2019) is described by the South African, as a writer, speaker, researcher, consultant, and philosopher. He complains that the plan to make History compulsory is a non-starter because it came out of the blue and was not an outcome of the DBE planning processes in the first place. He expresses the concern that the concomitant costs make the notion too time consuming and too costly.

The History academic, Karen Harris (2018), also comments on the compulsory History saga, reminding us that it is nothing new, nor is it a bad idea for historians to influence policy. She quotes the British Historian, David Armitage who said, that historians need to “step up to ‘shape public policy’” (quoted in Harris, p. 4). Drawing from a range of historians, history teachers and commentators, Harris also reminds us that History internationally and in South Africa has been in service of contributing to the political realities of the day, from one perspective or another. It is in the nature of the subject, that the political present is shaped by history.

Harris reports on the public reaction to the proposed compulsory History by referencing the social media posts at the time of the 2018 HMTT report announcement and press coverage. Included in these are comments such as that instead of History, “students should focus on STEM (Science, Technology, Engineering and Maths) if they wanted to escape poverty” (p. 8) and “We don’t need a nation of historians – we need a nation of mathematicians, scientists, artisans, accountants and computer coders” (p. 8). Harris pits this public view against a prevailing view that highlights the need in the modern political economy for “critical thinking, reading comprehension, active listening and speaking” (p. 8) rather than the more easily learned technical skills parents see as being so valuable in the job market.

Johan Wasserman (2017) is blunt in his assessment, saying that the call for compulsory History is a reactionary move by government to introduce patriotic History. He says of the discourse implicit in the voices of government represent a kind of History that is blindly patriotic and uncritical and which is about, “Big men, a contemporary political history foregrounding the struggle, and a one-dimensional nationalistic history with a single official narrative ... that one-sidedly spoke to the struggle against colonialism and Apartheid, and to ANC triumphalism” (p. 65-66). Wasserman’s contribution to the debate is that he cuts to the chase, with a dire warning that the motivations of the state may be much more reactionary than constructive.

Nussey (2018) speaks about the challenges faced by History teachers in the classroom even before it becomes compulsory. She takes a position that there are positives that could be garnered from the HMTT report including that the proposals made regarding the value of “multi-perspectives in history,

while favouring an approach that uses an African nationalist paradigm, informed by Ubuntu, [could] assist with nation-building” (p. 1). However, like Wasserman (2017), she warns that such an approach is unlikely to solve South Africa’s social woes. Nussey’s contribution to the debate centres on raising awareness about how a reconceptualised Ubuntu, if combined carefully with “reconciliation pedagogy” could assist teachers to more effectively manage and facilitate meaningful engagements in the History classroom that could contribute to a wider social cohesion project in a country where stories of the past are implicitly constructed around difficult social relationships.

Although Tibbitts & Weldon (2017) do not specifically reference the compulsory History proposal in their article, *History curriculum and teacher training: shaping a democratic future in post-apartheid South Africa?*, they do address the failure of the government to deliver on its own RNCS mandate with regard to delivering a History curriculum that contributes to a democratic future. It could be justifiably extrapolated that this failure to do this even when the subject is not compulsory in a country with resource limitations at all levels of education from teacher training to classroom resourcing, would be exacerbated by placing an additional burden of expanding to all schools. Like Nussey (2018) and Wasserman (2017), they reference the deep complexity, difficulty and emotionally charged nature of History as a school subject in a country born out of conflict and trauma.

The motivation of the DBE, through Minister Angie Motshekga, and the findings of the HMTT are the subject of this dissertation and their positions are discussed in detail in Chapter 5. However, in summary, there is a clear position taken by Minister Motshekga that a key reason for the social unrest in South Africa, from xenophobia to the decolonisation movement, is the fact that citizens in South Africa do not know their history. Both the Minister and the HMTT are clear in their proposal that History should be made compulsory at school throughout the schooling years and that its content should be Afro-centric rather than Euro-centric, encompassing South African and pan-African history, amongst other topics. As the Minister says, "Research so far had shown that as a subject, history has a number of positive effects such as contributing to nation building, national pride, patriotism, social cohesion and cultural heritage” (M&G Staff reporter, 2014, para. 3).

### **Policy and policy making in SA**

A final piece of the contextual puzzle is to have some insight into how policy making happens in South Africa in the post-1994 period. Given the fundamental changes in South Africa at the point of transition from the Apartheid government to the democratic government led by the ANC under Mandela, almost every policy and law needed to be changed or at least amended. The highest law of the land, the Constitution of South Africa, promulgated in 1996, embodied the required changes to policy and legislation. As the primary policy framework, the Constitution is the standard against which all other

policies and laws must be measured. Much of the pre-1994 regulatory framework could no longer apply, being basically discordant with the democratic precepts built into the Constitution. The mammoth and time-consuming task of rewriting all policies and laws was, and is still, enormous, and it remains incomplete for this reason. Every sphere of public (and even personal) life is prescribed and proscribed by legislation. All legislation is framed by policy. In a democracy, policy- and law-making is more complex and more time-consuming in that public consultation is designed to be a part of the process.

What follows is the most simplistic description possible, and aims only to frame the kinds of processes that policy-making in post-Apartheid South Africa must follow, in order that the proposed compulsory History policy can be appropriately contextualised.

It is useful to use a definition of policy that the following discussion in particular, and my dissertation in general can reference. Roux (2002) quotes Anderson's definition: "a proposed course of action of a person, group, or government within a given environment providing obstacles and opportunities which the policy was proposed to utilize and overcome in an effort to reach a goal or realize an objective" (p. 425). According to the Education & Training Unit for Democracy & Development (EDU), the definition of policy in South Africa refers us to the goals that a government or its departments wish to achieve in a particular sphere of life, which includes guiding principles and methods designed to achieve the goals (n.d.). Roux (2002) agrees that, "No administrative action can take place if specific goals and objectives have not been set" (p. 420). The difference between these definitions is one of emphasis, but they both agree that policies are designed to achieve goals.

The EDU explains that laws, as distinct from policies, are specific regulations that are designed in order that policy can be achieved, regulated and monitored, and are subject to the management of mandated courts of law. Laws are therefore the legal enactments of policies. This important distinction indicates the time lapse and procedural pathway that should take place before a policy finds expression in law, and is implemented. It is also important to note that policy-making is driven by the ruling party, specifically the executive branch of government, who develops policy. The legislative branch approves the policy and passes laws pertaining to the policy.

In South Africa there are five stages in policy- and law-making<sup>12</sup>, each of which has protocols and timeframes to follow. Stage one is when the ruling party convenes a conference at which a policy is presented to parliament to debate the vision, goals and direction of policy. In Stage 2, the relevant

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<sup>12</sup> This information is drawn from the Education & Training Unit for Democracy & Development website <https://www.etu.org.za/toolbox/docs/govern/policy.html>

Ministry drives the policy into some formalised shape, by developing a Green Paper, or discussion document, which is then used for debate and public comment. These engagements happen in different parliamentary and select committees in national Parliament and in the National Council of Provinces, including ministry-specific portfolio committees in provincial legislatures. Policy is finalised in Stage 3 of the process, during which the amended Green Paper is re-presented as a White Paper. At this stage it is still not legislation (Roux, 2002). This is once again debated in parliament and only then sent to Cabinet for approval. Stage 4 is where the White Papers are translated into laws, firstly by the development and debating of Draft Bills.

At this stage there are a number of steps that must be followed before the Draft Bill is even tabled for debate by Parliament. It has to be approved by a Cabinet committee, then taken into the public domain for comment, after which changes are made. It then goes to Cabinet to check that the goals and objectives are congruent with the Constitution and do not contradict any other policies and laws. After it has been checked by state legal advisors, the Minister will then table the Draft Bill in Parliament. Another set of steps takes over at this point. It goes to the National Assembly who will then send to the relevant Portfolio Committee, who reviews it and again seeks public comment. When the Portfolio Committee is satisfied, it sends the reviewed Draft Bill with a report back to the National Assembly. The National Assembly takes a vote and then passes it on to National Council of Provinces where it is again considered by the relevant select committee. This can take time if the Draft Bill has provincial application. As the NCOP is made up of party representatives, they generally vote according to their party. Still part of this stage, once the two houses of parliament have voted on the Draft Bill it gets sent to the President to be signed into the body of national law.

The Sixth and final stage is when it is published and subordinate legislation is drawn up. Only then are it collectively implemented at a national, provincial and local government level.

In theory, this complex process is obviously critical to ensure that no human rights are violated by the passing of laws that have not gone through a rigorous process of scrutiny. It is also indicative of how hard it can be to effect policy and law change, again in theory. Procedurally, there is room for public comment, but this depends on the government officials responsible for stakeholder consultation doing their task diligently. This, for example, was one area in which the HMTT was criticised in its stakeholder consultation process, both for the limited number and range of consultations, for the questions asked, and as indicated by the fact that their proposals did not reflect the substance of reaction to the proposal, especially by interested stakeholders (Bailey, 2017; Bailey, 2018a; 2018b; Noor Davids, 2016; Van Eerden & Warnich, 2018).

Roux (2002) makes an important point that policies should and do change with the times, and should be responsive to a wide range of influences, from the political to the environmental to the technological to public demand. However, change must follow due process. It is evident from the prescribed procedure that policy-making in South Africa has sound grounding in democratic principles. What is less clear is the extent to which all the procedures are actually followed, every time.

Policy-makers are largely drawn from legislative institutions at the various tiers of government (EDU, n.d.; Roux, 2002). Policy actors at all levels have a responsibility to ensure that they are informed about all aspects of policy implementation and impact, as any changes must be in response to the need to change, the fact that policies are not in fact contributing to the goals that they purport to. In many respects this is an Achilles' heel of policy, making it vulnerable to the capacity (time and resources), commitment and diligence and even the manipulation by policy actors for particular ends. Roux (2002) speaks of the need for skilled, consultative and participatory policy analysis (or assessment) to ensure that policies are indeed responsive.

The above brief insight into the procedures of policy making in South Africa can shed light on to the complexities of processes that result, on the ground, in the translation of policies into law. The complexity of the process is both its strength and its vulnerability. It makes it easier to understand, at worst, how unscrupulous manipulation can take place at any stage of policy making, and at best, how long it can take for policies and laws to be changed. It also throws a challenge out to citizens of a country to ensure that they both understand how this aspect of governance works and that they are vigilant in their communication through the hierarchy of policy actors in the event of protecting democracy and human rights, especially in a country where the highest law of the land is defined by these two principles. The decades since 1994 have been especially challenging for South Africa, from the plethora of policy change that has been required to transform governance from a dictatorship to a democracy, to the unscrupulous abuse of the governance vulnerabilities especially under the Zuma-led government, the impacts of which continue to undermine the whole country. Again, this underlines the importance of vigilance in respect of all policy: does it serve the *demos*? Does it contribute positively to democracy? This is the main reason behind this policy analysis, and I propose that Bacchi's WPR methodology is highly useful for this purpose.

## **Conclusion**

In this long chapter, I have attempted to provide a detailed framing for my thesis development, by providing a round contextualisation of those aspects that I believe to be relevant to understanding what factors influenced the DBE problematisation that led to their proposal to introduce compulsory school History. My research interest is in how a CPA could assist in understanding how one policy proposal

could demonstrate how the ANC government is executing its governance mandate currently, where it appears that the last 15 years or so have seen the democratic ideals of the post-1994 South Africa systematically compromised. To be able to apply the CPA in a way that revealed sufficient 'data', I felt it necessary to provide a reasonably holistic picture of the context, historically and politically.



## Chapter 4. Methodology: Approach and Tools

### Introduction

In this chapter the overall approach that informs the analysis, and the methodological toolkit devised by Bacchi used to analyse the selected primary data source documents are described. This approach and set of steps is defined by a process developed by Carol Bacchi known as *What's the Problem Represented to be* (WPR). The selected documents represent a policy proposal championed by the Department of Basic Education (DBE) to make school History a compulsory subject in South Africa at the Further Education and Training (FET) level, effectively making it compulsory throughout schooling.

Using the theoretical framework of Critical Discourse Analysis (CDA) and Critical Policy Analysis (CPA), specifically Carol Bacchi's WPR toolkit of six questions and one further step, I explore the discourse implicit in the three texts to examine what they reveal about how the government has problematized the issues that have led them to this particular policy proposal, as a solution to a problem.

Part of the analysis is the contextualisation of the policy proposal into a period when the African National Congress (ANC) is facing powerful challenges to its position and its governance practices. This contextualisation is discussed in Chapter 2 of this thesis. As a political tool, the WPR analysis uses a series of questions to open up how a particular issue has been problematized, what assumptions and presuppositions are drawn from, what has influenced the problematisation, what is excluded from consideration, who and where are the champions and what the implications of all of this may be for the practice of governance. In my thesis I will extrapolate this impact factor to explore the implications for democracy in South Africa as the aspect of governance that I wish to understand.

The primary data sources for the analysis will be:

1. A key statement made by Angie Motshekga, Minister of the Department of Basic Education (DBE) in 2015, in relation to the proposed policy, after which the History Ministerial Task Team (HMTT) was appointed against a specified Terms of Reference to investigate issues related to the making History compulsory as a matriculation subject.
2. The Terms of Reference for the formulation of the HMTT.
3. The recommendations proposed to the Education Ministry by the HMTT.

The three texts are to be seen as complementary, three sides of the same coin so to speak. Text 1 (Motshekga's speech), is the initial text. By virtue of Text 1, Text 2 (HMTT Terms of Reference) is introduced. Text 3 (HMTT report) is the summary output of the work carried out by the HMTT based on Text 2. By analysing the three texts, and then aligning the findings, it will be possible to extrapolate

what and how the problematisation has occurred, whose interests are served, and what the potential impacts may be for South Africa going forward.

To maintain the focus of my thesis, I will use three research questions:

The primary framing question is:

1. Drawing from the Critical Policy Analysis theory, what does a Critical Policy Analysis examining the discourse of the proposed compulsory History policy of 2018 reveal about how the current government is or is not promoting democracy in post-1994 South Africa through its policy decisions?

To answer the above, I will respond to the following two questions by applying the WPR process to the selected documents (and to myself):

1. What does the WPR analysis of the three selected documents reveal about the proposed compulsory History policy, in the contemporary (and historical) context?
2. What are the possible implications of this finding for the case of promoting democracy in South Africa?

### **The WPR approach and method**

As described in Chapter 2, the WPR approach is defined by the principles and interpretations of CDA and CPA, notably those aspects that define discourse as being social, contextual, and political (Fairclough, 2013; van Dijk, 2010). The WPR method constitutes the six questions and additional step, as formulated by Carol Bacchi.

#### *WPR approach*

The usefulness of the WPR approach lies in the way it works with revealing the underlying dynamics that result in particular policy formulations. It acknowledges that policy is not “any government’s best effort to solve ‘problems’; rather, policies produce ‘problems’ with particular meanings that affect what gets done or not done, and how people live their lives” (Bacchi, 2012, p. 22). In this view, according to Bacchi, the ‘public’, of which we are members, is governed, not through policies, but through problematisations, that is to say, how ‘problems’ are constituted in policies (Bacchi, 2017). This affects how the public must live, and by extension, must affect how the public does, or at least can, respond. So, for Bacchi, WPR is essentially a political tool.

Bacchi (2012; 2015; 2017; 2018) reminds us that typically there is an understanding that policy exists to solve problems (as per conventional problem-solving thinking). CPA posits a more careful look at the assumptions around problems. She tells us that problems are constructed as particular kinds of

problems within policy proposals (Bacchi, 2017), and how they are produced has important political implications. Hence it is important to make a shift from focussing on problems - understood as objective, innocent phenomena - that need to be rectified by equally objective, innocent solutions, to problematisation - which engages with how problems are understood/produced (Bacchi, 2017). In this way, we have a more honest insight into what policy enactment may result in, and whether it is progressive or regressive, even repressive. At the least, we will understand better how policies are formed and on what presuppositions they are based, and what they exclude or do not consider, enabling us to be aware of the implications of policy formulations.

The focus is not on intentional issue manipulation or strategic framing, particularly. Instead, the aim is to understand policy better than policy makers themselves by probing the unexamined assumptions and deep-seated conceptual logics within implicit problem representations (Bacchi, 2017). It follows therefore, that the intention is not to solve what may appear to be problematic policy, but to openly debate, to become aware of the various, including possibly unintended, consequences, to factor underlying presuppositions into our understanding of what may result from particular policy formulations. In short, to be critical. And political.

#### *Why use this approach?*

The WPR approach is a relatively simple tool in that it enables a systematic examination of policy to inform a closer understanding of what lies behind it. This understanding provides a better insight into how we are governed. From understanding how we are governed, we can make inferences about the interests that are ultimately being promoted (and not promoted). This provides us with choices as to how to respond. Policy is a political enactment, or at the least, provides the justification for a political enactment. As critical citizens, it is an act of political responsibility to be aware of what and how governance happens, and to hold government accountable.

The value in being so interrogative is that it enables us, as citizens, to challenge the notion that problems are innocent and immutable givens, and that they exist outside of the forces that constitute them. Focusing on problems can produce, and then reproduce, dangerous realities, naming them as ills that can be removed by simple solutions, that deny the complex political dynamics that are part of their constitution (Bacchi, 2015; 2017). It also helps us to understand how the way issues are constituted determines the practice that follows, and the practice that follows either reproduces or transforms, and even provides opportunities for challenging ways of being governed (Bacchi, 2017). Finally, it is a conscious act of political awareness for us to examine, lay bare, and understand the practices of governing that affect us.

Having identified the value of this approach, it is important that we do this with integrity and ethics. We need to as rigorously apply the same problematisation to how *we* think about what we critique – self problematisation, bringing us to the awareness of our own limitations. We need to be in a state of perpetual alertness, constant problematisation and re-problematisation (Foucault cited in Bacchi, 2017) of other and self, self and other. This builds empowered political awareness and responsibility. What the WPR approach offers is a way of interrogating phenomena – any phenomena – to see what meaning is embedded in it – what thinking constructs the proposal and what thinking it will contribute to constructing. In short, WPR is a ‘dissection’ tool useful to reveal what assumptions, ideologies, social constructs lie embedded, even hidden. Without some form of critical analysis, we run the risk of being fooled, as Bacchi says, policies unquestioned are presented as being real, as if they are wholly legitimate, as if the problems they propose to address are immutable, and that the policy is a clear simple solution. Bacchi says that understanding the problem *representation* is how a ‘problem’ is “*constituted in the real*” (2018a, para. 3), that is to say how it is defined based on a number of aspects, all of which the six questions of the WPR seek to uncover.

### *Problems and problematisation*

Central to WPR is the distinction between problems and problematisation. Most policy (in fact, most of our lives) are determined by focussing on problems and problem-solving. This approach presupposes that problems are real, and have objective conditions that have tangible solutions that can resolve them. In this way, problems are seen as standing away from any forces within which they exist – they are not contextual; they are not social; they are not political, and they are essentially soluble based on dealing with them on their own objective terms. It follows that how the problem is conceptualised will determine how the solution is conceptualised. This interpretive approach places the onus on problem solvers, including policy makers. In contrast to that the post-structuralists focus less on the policy actors and more on how issues are problematized, or understood, as problems within policy. It is the way that they are problematized that constructs the problem of a certain shape (Bacchi, 2017). In respect of policy, this then leads to a determination about how citizens are governed.

The useful work, then, is to interrogate and rethink how problematisation happens, constantly. In this way a political ethic can be claimed, and a more appropriately informed and responsive practice can be achieved (which is likely to change as contextual factors change), through a “through a process of continuous questioning and critique” (Bacchi & Goodwin, 2016, p. 40). It is also concomitant that such an approach allows for multiple voices, rather than being fixed on a problem-solution continuum.

### *WPR method*

In actually carrying out the CPA, I will utilise Carol Bacchi's tools of critical policy analysis, using her WPR questions, which seek to enable a systematic and rigorous process of policy analysis by subjecting policy discourse to six questions (Bacchi, 2017). I will apply these questions to the proposed policy for implementing compulsory History at FET level.

1. What's the 'problem' represented to be in a specific policy or policy proposal? This first question assists in clarifying the implicit problem representation within a specific policy or policy proposal, i.e. how and what issue has been identified, conceptualised and the framed as the basis upon which the remedial intervention, or proposal, (making History compulsory) is formulated. In relation to my inquiry, this will be paraphrased in reference to the selected texts to be analysed as: What is the problem identified by the DBE/HMTT that they believe making History compulsory will resolve?
2. What "presuppositions or assumptions underpin this representation of the 'problem'" (Bacchi, 2009; 2013; 2017)? Where have they come from? The second provides the opportunity to reflect on the underlying premises underpinning this representation of the 'problem'. This enables me to consider the trajectory of logic that joins the solution (proposed policy) to the problem representation to the presuppositions or assumptions that are embedded in the representations.
3. How has this representation of the 'problem' come about? The third question enables consideration of the "contingent practices and processes" (Bletsas & Beasley, 2012, p. 22) through which this understanding of the 'problem' has emerged. For the purposes of my study, I will paraphrase as follows: What are the forces/events/concerns that have led to the particular problematisation for which making History compulsory is the best "solution"? In this way context is brought to bear on the process.
4. What is left unproblematic in this problem representation? The fourth question probes what is excluded from the problem representation - that which Bacchi refers to as the "silences". What is in is as important as what is not. Looking for the gaps indicates the limitations of the problem representation. It also allows for rethinking and reimagining alternative representations and solutions. For the purposes of my thesis it will be paraphrased as: What issues and factors are not included by the way the "problem" has been considered and conceptualised? What are the likely or possible implications of these silences?
5. What effects are produced by this representation of the 'problem'? The fifth question allows an assessment of what the effects, the impact, may be of the particular problematisation. The

representation defines what is deemed to be relevant, and what is not. This “selection” of relevance will have a profound effect on people’s lives including shaping how they understand themselves and the issues at hand, and importantly will shape how they are governed. In many ways, this question lies at the heart of the analysis, speaking to the purpose of doing a WPR exercise on policy in the first place. For my thesis, the focus is on what the likely implications of this particular problematisation for how we are governed, especially in relation to the democratic ideal as embedded in the South African Constitution? Of course, looking at one policy only provides indicative inferences, rather than a comprehensive picture.

6. The sixth question asks how and where (and even by whom) this representation of the ‘problem’ has been produced, disseminated and defended? This question enables me to dive deeper into the ‘construction’ of the proposed policy by examining how, where and even by whom the representation of the need for compulsory History education and the resultant policy has been “produced, disseminated and defended” (Bacchi, 2017, para. 6). It is in this question that the gross interests of the policy actors are laid bare.

By extrapolation, this question provides a further opportunity to ask how a policy has been (or could be) questioned, disrupted and replaced. In this way it fosters critical engagement, including contesting the way in which the problematisation has been put together, the policy-making process itself.

In addition to the above six questions, Bacchi has more recently added a seventh step, applied to the researcher herself. This step involves the researcher self-problematising her own position, by applying the WPR questions to the way she engages with the matter at hand (Bacchi, 2017). This undertaking signals a commitment to include oneself and one’s thinking as part of the ‘material’ to be analysed. The importance of self-problematisation is precisely in line with the assumption that no one is neutral, neither the policy actor, the policy output nor the researcher. Therefore, at the outset, I will own up to my position in relation to the WPR process. The argument here is that the ways in which ‘problems’ are constituted elicit particular forms of subjectivity, influencing how we see ourselves and others, and how we understand the world. Hence, self-problematisation (or ‘self-reflexivity’ – although Bacchi chooses not to use this term) forms a crucial part of the analysis.

In this step, I acknowledge that the limitations of this Master’s thesis does not allow for me to do a detailed self-problematisation in the line of a typical WPR analysis. Instead, I will draw from Bacchi’s reason for including this step, i.e. that the researcher is never neutral, and her positionality is relevant to, and will affect, the process of the WPR analysis. In the simplest way, I will own up to my positionality, including briefly identifying my own problematisation, assumptions, silences with some

degree of tabling possible effects. In addition to this, I will take the opportunity to reflect on the research process, what I learnt, what I struggled with, and what I did not get to, and would see value in for future research.

### **How will the WPR be applied in this inquiry?**

In summary, in respect of my inquiry, I will seek to understand what the DBE has identified as the problem, how they have problematized this and what the implications of this may be. To do this, I will subject the public statement from Ministry of Basic Education, the terms of reference for the HMTT, and proposal made by the HMTT, *as a group of documents*, to the WPR questions.

The findings from the WPR exercise will assist me to structure the discussion and formulate conclusions in respect of my main question.

The analysis will draw from the findings after applying Bacchi's questions to the three documents, in relation to an understanding of democracy. The thesis is not strictly a WPR exercise, because the subject of the analysis is not a legislated policy, however, as Bacchi said more recently at a CDP conference in 2017, we can use the approach as a "way of thinking critically" to interrogate and understand "the full range of governmental and knowledge practices", how any form of proposal problematizes within the construction of its proposal – from laws to cultural ceremonies to marketing texts to theoretical propositions and concepts even to buildings such as schools.

In this case, I am using the main WPR question: If this (making History compulsory) is put forward as the *proposal*, the recommendation, as the consequent action, the *way forward*, then what has been identified as needing to change, i.e. what has been pinpointed as being problematic and how is this "problem" represented, or problematized? How is it characterised and conceptualised? By interrogating the problematisation, I am interested to see what assumptions & presuppositions inform this problematisation, and what this indicates about the ideologies, and power differentials of current governance practices. Finally, and most importantly, I will explore what the net product (i.e. the assumptions, the problematisation and the proposal) means for the tender state of democracy here in SA at this time.

What is also interesting is that this exact trend of making History compulsory at school level, is not occurring in SA alone, but is being noted in various and disparate locations from the UK to Zimbabwe to Rwanda to Brazil and elsewhere.

This investigation is a desktop study. In carrying out this research exercise, I will be using three main data sources, unpacking them using the WPR toolkit. The validity of the findings are backed by the process itself, given that each question has its own set of stated assumptions and limitations.

The selection of the three documents is in itself a limitation in that there are a number of additional documents, statements, and political forces that undoubtedly affected the determination of the DBE to champion the proposal for compulsory History. Two of the documents selected as data sources were chosen specifically because they represent directly the *instruction* of the DBE in relation to the matter at hand. The third document is a response to the first two. Together these three documents address how a policy to make History compulsory is a response to a particular problem, as it is understood by the DBE.

As I will be only applying the WPR method to the identified three documents, and not to any specific determination of democracy, I will need to take extra care to develop a legitimate representation of this concept, against which to measure the findings of the WPR exercise, in order to legitimise any conclusions drawn. The definition of democracy will draw specifically from how this concept is defined in the South African Constitution, but will also reference current theories, as discussed in Chapter 2.

While it is tempting to ascribe evil intent to this problematisation, I am aware that this is neither legitimate nor purposeful. What is interesting is how this problematisation adds to our understanding of the politics of education in South Africa at this time, and how it may reveal the interests that are served, and provide insights into how we choose to respond.

So theoretically, at the heart of the WPR approach is the focus on problematisation (and Bacchi draws directly from Foucault in this). She goes on to quote Nicolas Rose who says:

*... If policies, arguments, analyses and prescriptions purport to provide answers, they do so only in relation to a set of questions. Their very status as answers is dependent on the existence of questions. If, for example, imprisonment, marketization, community care are seen as answers, to what are they answers? And in reconstructing the problematisations which accord them intelligibility as answers, these grounds become visible, their limits and presuppositions are opened for investigation in new ways. (Rose, 2000, p. 58, cited in Bacchi, 2017)*

### **Description of data sources: Three documents representing the proposed compulsory History proposal**

For the purposes of this thesis, I selected three key documents<sup>13</sup> that illustrate the way in which the DBE presented their position in regard to the notion to make History a compulsory school subject at the FET phase in South Africa, based on my assumptions as a politically active critical citizen of SA. The

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<sup>13</sup> Links to the documents are attached as Appendix 1



first document is a statement made by DBE Minister Angie Motshekga in 2015, in which she explains the rationale behind commissioning an investigation into the plan to make History compulsory. The second document is the government gazette dated 09 October 2015 that legislated the appointment of the HMTT and specified the Terms of Reference for their investigative assignment. The third document is the recommendations presented to the DBE by the HMTT in 2018.

*Minister Motshekga's keynote speech at the 1st History Round Table Discussion held at the DBE Conference Centre, Pretoria, 03 December 2015*

The speech, published on the South African Government website, was entitled, "A country that does not know its History has no future" (Motshekga, 2015). It could be described as an impassioned rationale for why History should be made compulsory at schools. The audience included senior ministers and government officials, as well as senior representatives from universities, organised labour, the Non-governmental Organisation (NGO) sector and other key stakeholders.

The following are some key extracts that signify how the Minister thinks about history as a phenomenon and as an academic discipline<sup>14</sup>.

- She posits at the outset that "we have not made a determination about the status of History as a compulsory subject as yet. [The matter is] still under discussion, that *no decision has been taken*" (para. 3).
- She notes that the exercise is not being done for "the *sole* purpose of achieving short-term political expediency.", or for the "benefit of the new ruling elites" (para. 3).
- She claims two key reasons for the proposed idea: firstly that, quoting Burke, "*Those who don't know History are destined to repeat it*" (para. 4)." The second being a "*last bid attempt* at the decolonisation of the African mind" (para. 5).
- She says that the History curriculum must present a "*nuanced approach*" "without airbrushing the actual story and multiple interpretations of the apartheid past - neither must we glorify the story of the liberation movements presenting them as an equivalent of moral virtue" (para. 5).
- She wants learners to be "able to engage critically with the horrendous stories of colonialism, apartheid, and the liberation struggle" (para. 7).
- Having made the above statements by way of introduction, Motshekga then says "As the basic education sector, we have come to a deliberate determination that is it the schooling system that must play a key role in the preservation and remodelling of our History. In this regard, the

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<sup>14</sup> All italicised emphasis is mine.

teaching of History must empower young people with the ethos of the new South Africa as enshrined in our constitution thus cementing the project of nation building, social cohesion and reconciliation. These values must form the bedrock of a new person we seek to mould” (para. 9).

- She claims, as if it is a given, that, “Educationists believe that the study of History serves a range of important functions such as *enriching social, and political lives*. History *encourages civic responsibility and critical thinking* – these are *key values needed in a democratic society*” (para. 11).
- Another categorical claim of truth: “It is indeed, a *universal truth* that historical perspective fosters a proper understanding of the growth of *multiple and overlapping human identities*” (para. 11).
- “History as a subject asks uncomfortable truths about what we think we know” (para. 11).
- The speech is full of a language of certainty, “It is *only* through History as a subject that we can *promote the principles of non-racialism, non-sexism and the supremacy of democracy over anarchy*” (para. 12).

*Government Gazette appointing HMTT with Terms of Reference, published 09 October 2015*

The key feature for the purposes of my thesis is the terms of reference of the Ministerial Task Team, defined as follows:

- i. conduct a research study on how best to implement the introduction of compulsory History in FET schools as part of citizenship located within Life Orientation;*
- ii. Strengthen the content of History in the FET band;*
- iii. Review content in the GET band;*
- iv. Proposal regarding Teacher Development in the area of Initial Professional Education and Training (IPET) and Continuous Professional Teacher Development (CPTD); arrange public hearings on the findings and compile a report; draft the implementation and management plan with clear time frames including;*
  - > Alignment of the History textbooks according to the reviewed curriculum;*
  - > Make recommendations on the key concerns relating to the introduction of compulsory History in the FET band, and the implications of these recommendations if implemented; and*
  - > Make proposals for gazetting policy and regulations amendments emanating from this process.*

*v. Compile a final report and present to the Minister and Senior Management” (SAG, 2015, p. 1).*

The appointed team is an interesting selection of History stakeholders. There is a notable absence of teacher training professionals, teachers, and parents.

- Professor Albert Grundlingh, History lecturer at Stellenbosch University.
- Professor Peter S Lekgoathi, History lecturer at Witwatersrand.
- Dr Sifiso Ndlovu, South African Democracy Education Trust and UNISA.
- Dr Jabulani Sithole, History Lecturer at University of KwaZulu Natal.
- Luli Callinicos, Heritage and History Consultant, Robben Island Museum Councilor & Board member of the National Institute for Humanities and Social Sciences.
- Dr Gail Weldon Retired History Senior Curriculum Planner from Western Cape Education Department & Education Consultant
- Dr Nomalanga Mkhize, History lecturer at Rhodes University

*Report of the History Ministerial Task Team, 2018*

The recommendations of the HMTT after a three year research process, presented to the Minister, and the public, in 2018 is a long document of 157 pages. They also presented an executive summary, which contained the following main recommendations:

- *Introduce History as a compulsory subject in the FET (Grades 10 – 12) Phase.*
- *Life Orientation to remain a compulsory subject until Grade 9 (GET Phase).*
- *At FET Phase, compulsory History to replace Life Orientation as one of the Fundamental subjects.*
- *At the GET phase, Life Orientation to be maintained as a compulsory subject and the content should be strengthened.*
- *Life Orientation should be phased-out incrementally from the FET curriculum from 2023 (Grade 10) to 2025 (Grade 12).*
- *The notional time in Grades 10-12 should be increased from 27.5 hours to 29.5 hours per week.*
- *Compulsory History to be phased in incrementally from 2023 (Grade 10) to 2025 (Grade 12).*
- *CAPS curriculum has serious limitations and a complete overhaul of CAPS is required. Africa-centeredness should become a principle in revising the History content.*
- *The 6-7 years towards the phasing-out of Life Orientation in the FET band be used to prepare the system for compulsory History in the FET band.*
- *The notional time of 4 hours per week for teaching History in the FET band must be maintained.*

- *History Teacher Development should be strengthened by institutionalising the DBE's Continued Professional Teacher Development (CPTD) programmes.*
- *Two final year examination paper at Grade 12 with Paper 1 focussing on African History and Paper 2 focussing on History of the wider world including Europe or vice-versa" (HMTT, 2018, p. 4).*

The three texts will be analysed together using the WPR methodology in the next chapter.

## **Chapter 5. WPR analysis of the key source documents**

### **Introduction**

In this chapter I will apply the WPR methodology to the three selected documents in order to explore what factors led to the commitment by the DBE to champion the proposal to make school History a compulsory subject in the first place. The WPR questions enable not only the close examination of the proposed policy, but also will enable me to identify what factors were not included in the policy-making process. From this I will draw inferences regarding what the overall implications of this proposed policy may be in general, but also specifically, exploring what such a proposal represents for the (fragile) state of democracy in South Africa.

I start by analysing the discourse in the three DBE documents to reveal the ‘problem representations’, in the proposal. I then analyse what underpins this problematisation by using Bacchi’s next three questions: What are the underlying assumptions revealed in the problematisation? How has this representation come about? What are the possible silences in this problematisation? These questions will generate findings that I will then analyse in chapter 5, in which I will ask what the implications of this particular problematisation are, with its assumptions and silences. Part of this analysis will be asking how and where, and by whom this representation of the ‘problem’ been produced, disseminated and defended. In the course of the analysis, I make reference both to relevant contextual factors (described in Chapter 3) and to the concepts used in the proposal as discussed in my literature review in Chapter 2.

The objective of the exercise is threefold: Firstly to understand how the DBE has constructed this problematisation. Secondly, by shining a light on the assumptions and limitations in the way DBE has constructed the problem to reveal the potential implications of the proposal in respect of governance practices, I hope to open space for debate about the proposed compulsory History proposal in the context of contemporary South Africa. Thirdly to examine the implications of this policy formulation for the current trajectory of democracy in South Africa.

### **Background**

The policy process to introduce compulsory History began in earnest in 2014 at a time when South Africa was embattled by anti-government political unrest in the form of service delivery protests, land disputes, xenophobic violence, and student unrest at many of the universities. This socio-political protest had been going on in earnest since 2007. In 2014, the teacher trade union, SADTU, petitioned the DBE to take steps to make History compulsory so that all South Africans knew the what they called the “real story”, i.e. one where the content focussed on African history in general and South African

history in particular, especially that of the liberation struggle, highlighting the role of struggle heroes and heroines, with less European history (Louw & Davids, 2014). In a document they presented to the DBE on the subject, SADTU insisted that such a move would “advance nation-building” (SADTU, n.d., p. 7). A month later in July 2014, the DBE Minister, Angie Motshekga, presented to parliament the plan to investigate the idea of making History compulsory. In her presentation, she indicated that she had already had experts looking into the matter and that, “Research so far had shown that as a subject, history has a number of positive effects such as contributing to nation building, national pride, patriotism, social cohesion and cultural heritage” (M&G Staff reporter, 2014, para. 3). In 2015 the HMTT was appointed to investigate the idea of making History compulsory. They delivered their findings to the DBE in 2018, in which they concurred with the idea of making History compulsory, with some recommendations. Later that year, the same team was reappointed to look deeper into some of the issues identified in the first report, primarily focussing on developing an appropriate curriculum. Minister Motshekga’s statement about the link between school History and, “nation building, national pride, patriotism, social cohesion and cultural heritage” appears to set the scene for what the priority aims of the proposed policy are. The same issues are represented in the three documents that are part of this analysis.

### **Data Analysis: What’s the Problem Represented to be?**

Bacchi posits that in order to understand what really lies within a policy, we need to work backwards from the proposal to see how the proposal defines and frames the problem (Bacchi, 2017). In respect of the proposal to make History a compulsory school subject, I will explore how, through the WPR analysis, that this solution is designed in such a way as to address the *particular construction of a problem*, i.e. the problem representation. The problem is therefore not the focus of attention, but it is a starting point.

There are basically two key but interrelated problems that have been identified by examining the DBE policy that they believe would be solved by the implementation of compulsory History at FET level. The first is the need for a more compliant and engaged citizenry that buys into the “democracy project” managed by the ANC-led government that spearheaded the liberation struggle. This would result in less public protest. The second is the need for South Africans to identify as Africans who share a common experience of colonisation from which they must be freed, bringing them into relationship with other Africans to halt xenophobic violence.

These problems have variously been described in the three texts as basically:

- A lack of political support at a time of country-wide protest against the ANC government.

- A lack of public awareness about the history of colonialism, apartheid and the liberation struggle.
- The “the project of nation building, social cohesion and reconciliation” (Motshekga, 2015, para. 10) is under threat.
- A lack of a clear African identity, including “multiple and overlapping human identities” (Motshekga, 2015, para. 13)
- A growing public rhetoric of racism and sexism (possibly gender-based violence).
- Limitations in an education that both serves the market place and the decolonisation of the mind.

My analysis of the three documents selected for this study, reveals a discourse in which a number of key terms<sup>15</sup> are used to explain the DBE’s position on their perceived need for compulsory History. These include concepts such as “citizenship” (Motshekga uses the word six times in her speech; the HMTT report uses it 27 times in their report); “civic responsibility” (used once by Motshekga and twice by the HMTT); “nation-building” (used once by Motshekga and three times by the HMTT); “social cohesion” (used once by Motshekga and six times by the HMTT); “reconciliation” (used once by Motshekga and four times by the HMTT); “democracy” (used twice by Motshekga and thirty five times by the HMTT); “ethos of the new South Africa”, “remodelling of our History”, and “new person we seek to mould” (all used by Motshekga); “Africa centeredness” (used by the HMTT). All of these terms are indicative of the discourse that frames the DBE rationale, and produces the problem (Bacchi, 2017; 2018) for their proposal. In analysing how these terms are used in relation to context and theory, I seek to analyse how the DBE would answer the following questions in relation to how they have represented the problem: What is citizenship? What is identity? What is nation-building? How are these concepts interrelated and how do they intersect with democracy, which means exactly what? What do the expressions “ethos of the new South Africa”, “remodelling of our History”, and “new person we seek to mould”, suggest about the agency that DBE is claiming in respect to how South Africans should think about themselves and their country, including their history? What do they say about democracy? What exactly does “African-centred” mean in words and practice, as discourse? Thinking about these key questions gives me clearer insight into what the DBE understands by these concepts, and how they have

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<sup>15</sup> These terms are drawn from a speech made by the Minister of DBE to the first History Roundtable in which she presents the proposal and the plan to appoint the HMTT, the TORs for the appointment of an HMTT, and the Report of the HMTT.

built their practice, or policy, around their determinations and concerns (or agendas), for it is this that they are problematizing.

### *Thinking about citizenship*

The notions of citizenship and civic responsibility are infused throughout all three documents, although they are never explained anywhere. Citizenship is mentioned six times in Minister Motshekga's speech, including where she says, "In fact, the teaching of History in schools should be regarded as an excellent example of promoting good citizenship" (2015, para. 16). It is specified twice at the outset in the Terms of Reference (TORs) "The Ministerial Task Team will be responsible for the following: i. Conduct research on how other countries have dealt with the introduction of compulsory History as part of citizenship in their schooling system;" (Government Gazette, 2015, p. 1) and again as being a key outcome of the proposed compulsory History curriculum: "The terms of reference of the Ministerial Task Team will be as follows: i. conduct a research study on how best to implement the introduction of compulsory History in FET schools as part of citizenship located within Life Orientation" (p. 1). In the HMTT report, citizenship is mentioned 27 times, including under a heading "Main aims and objectives of History teaching" where it says "Other aims include evoking patriotism; encouraging active and responsible citizenship, values, attitudes and behaviours, as well as fostering skills conducive to learning how to live together" (2018, p. 13).

Citizenship is presented as a desirable outcome, as if it is an end in itself. The way in which Minister Motshekga speaks and the way the HMTT appointment TORs are written shows that the decision to introduce compulsory History has already been made, and that all that is needed are guidelines on how to implement the plan. In her speech Motshekga assures her audience that the decision has not yet been made, only to later in the same speech say, "The Task Team will conduct continental and international research in order to be able to properly advise us on how best we can move towards the implementation of compulsory History in the FET band" (2015, para. 25). In the Government Gazette, it states that part of the task includes conducting research on the "best way to implement compulsory History in FET schools as part of citizenship" (2015, p. 1). These statements speak both to the urgency with which Motshekga (as a mandated ANC government spokesperson) seeks to implement the decision of introducing compulsory History as a solution to the need for a clear sense of citizenship within the South African population. The proposal directly relates the solution (compulsory History) to citizenship education in schools and to a population that demonstrates citizenship, which apparently does not include challenging the government using public protest.

In her speech to the History Roundtable, Minister Motshekga states, "... educationists believe that the study of History serves a range of important functions such as enriching social, and political lives.



History encourages civic responsibility and critical thinking – these are key values needed in a democratic society” (2015, para. 12). In this statement, the Minister ascribes to History the task of building civic responsibility in service of democracy. By associating civic responsibility with critical thinking, she suggests that the combination of these “values” will *ensure* democracy. It is unclear how this should be demonstrated. Embedded in the discourse used is the notion that civic responsibility is a component of citizenship, and that citizenship is necessary for democracy. It is not exactly clear what the DBE sees as constituting citizenship for democracy, as the discourse here does not necessarily line up with other parts of her explanations and actions, such as wanting to force all learners to study a particular History, that fosters, “values [that] must form the bedrock of a new person we seek to mould” (para. 12).

It is likely that in this instance, the DBE is using the “rights and responsibilities” inference of citizenship, i.e. that citizenship means that citizens can expect certain rights in the governance of a nation state, but this is accompanied by responsibilities to act in a certain way to support the functionality of the state (Council of Europe, 1996).

The HMTT is also infused with references linking education in general and History education in particular to citizenship. It reports, “As educators/teachers, our main aim is to teach learners, through their life experiences, how to use intellectual and social skills to become more effective learners and *responsible citizens*<sup>16</sup>” (2018, p.64). These links are made multiple times throughout the report.

In most of the theory written about citizenship, there is an implicit relationship between citizens and the state, where citizens enjoy the protection of the state, but in return, participate in the functioning of the state by honouring their civic responsibilities (paying taxes, obeying laws, contributing to the economy and so on)<sup>17</sup>. How to build citizenship presupposes a determination of what this is. Given the context of socio-political discord at the time, between 2007 and 2016 and even later, that the term was being bandied about frequently by policy-makers, unions and others in South Africa, we can assume that part of the understanding of citizenship was that citizens had a part to play in contributing to the stability of the state, through obeying laws.

How citizenship education has been defined in DBE guidelines, specifically for Life Orientation and History, leans into the suggestion that the good citizen of the democratic South Africa is one that:

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<sup>16</sup> My emphasis

<sup>17</sup> This has been discussed at length in Chapter 2 of my thesis.

Upholds the values of the South African Constitution...[encourages] civic responsibility and responsible leadership, including ... current social and environmental concerns; [promotes] human rights and peace by challenging prejudices that involve race, class, gender, ethnicity and xenophobia. [Is aware of] local, regional, national, continental and global responsibility” (DBE, History CAPS Guideline p. 13). The Life Orientation CAPS Guideline for Grade 12 says a good citizenship involves being able to, “Evaluate own position when dealing with discrimination and human rights violations, taking into account the Bill of Rights: participation in discussions, projects, campaigns and events which address discrimination and human rights violations” (DBE, p. 22).

These indicators are aligned to the Minister’s reference to citizenship being about contributing to democracy. It also speaks to what theorists such as Lister (1998) call participatory citizenship, what Seroto calls critical citizenship (2012), or what the Council of Europe (1996) calls democratic citizenship. However, for the DBE, clearly what was implicit in the Life Orientation curriculum was not sufficient, hence the plan to export the responsibility of citizenship education to the subject of History.

In their discourse, the DBE has clearly represented a key aspect of the problem as being an issue of citizenship.

Two factors bring into question the veracity of the notion that introducing citizenship is really tied to building democracy in South Africa. The first is the assumption that the DBE believes that citizenship is something that can be learnt, like a set of rules, without actually specifying what is meant by the term. At this point there is no prescription as to how citizenship education will be implemented, other than what already exists in the LO and History CAPS Guideline documents. However, the way it is explicitly tied to identity, belonging, nationalism and nation-building in the DBE documents should raise a few questions. According to Motshekga’s speech, the HMTT TORs and the HMTT Report, it is linked to a kind of History education that is to be explicitly aligned to African nationalism (HMTT Report, 2018), and in the way that SADTU suggested to DBE, where the emphasis is on telling stories about African achievements and African heroes and emphasising the role of the ANC in the liberation struggle (SADTU, n.d.). This link between these concepts is not unnatural in that they are by their very nature linked (Sicakkan, 2005), but it is the contextual issues, the socio-political unrest, that begs the question as to whether the kind of citizenship that is being considered is what Sicakkan calls “civic nationalism” (2005), or what Lister calls “patriotism” (1998) education.

The powerful role of education in socialisation, specifically citizenship, is referenced by the HMTT when they speak of the “main aim” of educators being to develop “responsible citizens” (2018, p.64). This is echoed by Motshekga when she says, “As the basic education sector, we have come to a

*deliberate determination that it is the schooling system*<sup>18</sup> that must play a key role” (2015, para. 10). Throughout the world and throughout history, education has been tasked with contributing to building citizenship. Veugelers and de Groot (2019) and others have mentioned that this is standard practice and as an institution of society, this is not in itself sinister in any way. According to Bronfenbrenner’s bioecological systems model (Bronfenbrenner & Morris, 2006), schools, churches and other social institutions are central to the process of socialisation, where socialisation refers to how individuals learn the cultural codes and norms required to live in and navigate their particular societies. How citizenship education in school systems is *constituted* and what *purpose* it is put to is where the conundrum arises, and it is insight into this that this WPR analysis seeks to uncover about how the DBE has problematized these phenomena.

That the DBE sees the function of schools (i.e. their own mandate) to *create* a certain kind of person, or citizen, raises some concern. Motshekga says, “These values must form the bedrock of a *new person we seek to mould*.<sup>19</sup>” (2015, para. 10). In a socio-political context of high levels of anti-government/anti-ANC sentiment and protest, this phrase triggers associations with social engineering and indoctrination at worst, or Sicakkan’s “civic nationalism” at best. It stands in contradiction to Motshekga’s assertion that the purpose of the exercise is to build the kind of democracy “... as enshrined in our constitution” (2015, para. 10).

Within education, History is clearly identified as the location for this citizen “moulding”. Again, there is international precedent for the way History is used in citizenship building, precisely because the way in which the history of a place is recorded and presented has a powerful influence on how citizens understand their own history, and associated with that, their complex identities (Auerbach, 1964; Christie & Collins, 1982; Cross, 1994; Ferro, 2003; Haydn, 2012). The way in which the Nationalist Party used History to justify their race-based policies, and secure white dominance in South Africa is a case in point, and has been well documented (Auerbach, 1964; Christie & Collins, 1982; Cross, 1994; Hofmeyr, 1982; Rehman, 2008; Van Heyningen, 1960). Albeit not embedded as the only story in the History curriculum, nor in History textbooks, a different telling of history has made up the narrative espoused and disseminated by the various liberation movements to justify the struggle against colonial and Afrikaner hegemony (Bertram & Wasserman, 2015; Calinicos, 1986; Cross, Carpentierb, and Ait-

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<sup>18</sup> my emphasis

<sup>19</sup> my emphasis

Mehdib, 2008; Ferro, 2003; Masooa & Twala, 2014; Siebörger, 1993). It appears to be what SADTU is seeking in its submission to the DBE in 2014, and is echoed explicitly in the HMTT Report.

The language used by the DBE about the History curriculum is telling. Motshekga speaks of “the *remodelling of our History*<sup>20</sup>” (2015, para. 10). This indicates that the DBE believes that the school History curriculum can be modelled in such a way as to both change and protect the country’s history and that the telling of this remodelled story can change how citizens behave. “In this regard, the teaching of History must empower young people with the ethos of the new South Africa” (para. 10). Haydn has strong views about how History can be used as propaganda. He says, “The desired nature and form of school history depends on what sort of citizens the state wants to cultivate. In today’s world, is it better to have citizens who are loyal, compliant and credulous, or citizens who are discerning in their ability to handle information intelligently, and who have been educated to be constructively critical in evaluating the reliability and authority of what they are told, by politicians, the media, the internet or even historians?” (2012, p. 274). It would be revealing to ask Minister Motshekga which citizen she would like to “mould” with the proposed curriculum.

The extracts related to citizenship and education examined above are aligned, and reveal that the DBE has represented the lack of citizenship as a problem, and have defined it as an essential outcome of education and that the school subject History would be an appropriate location in the curriculum for teaching this, and that the best way to achieve it will be through making the subject compulsory.

#### *How does identity (and African nationalism) fit into the picture?*

Tying the concepts of citizenship, identity and nationalism together is the notion of belonging, what Sicakkan refers to as “belonging modes and identity politics” (2005, p. 199). He speaks of the centrality of place, uniformity and time, or history, to these notions. Citizenship and identity tie one to a place and a community with which one identifies, even if the criteria of identity are imagined rather than material. This identification, or sense of belonging, is often created by stories (histories), sometimes socially presented (as in oral tradition and culture), sometimes told for political gain. Sicakkan notes that for nationalists, identity related to past history is of high significance. Lister (1998) speaks of republican identity building which is often constructed in terms of the future. In her speech, Motshekga brings the focus of this identity politics to South Africa, when she says, “In this regard, the teaching of History must empower young people with the ethos of the new South Africa as enshrined in our constitution

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<sup>20</sup> my emphasis

thus cementing the project of nation building, social cohesion and reconciliation” (2015, para. 10). She implies that through the way history is presented, young South Africans will automatically buy into supporting the country. The HMTT (2018) expands the notion of identity politics to Pan-Africanism, with an extensive discussion on the importance of telling the kind of stories of the African past that fosters human solidarity across the continent.

This melding of identity politics, a sense of belonging with what it means to be a citizen of a nation (or a Pan-African nation) provides the basis for building a narrative of nationalism which can be translated into a plan of action around nation-building. The discourse of the DBE around making History compulsory is articulated in these terms.

In representing the problem of identity, the DBE implies that there is a threat to “the project of nation building, social cohesion and reconciliation” (Motshekga, 2015, para. 10) that must be remediated by all History teachers in all schools. The speech continues, “It is indeed, a universal truth that historical perspective fosters a proper understanding of the growth of multiple and overlapping human identities.” Motshekga’s lens is on South Africa. The HMTT report takes the identity politics into the continent. They describe at length how the African identity is diminished in the current History curriculum, and they speak enthusiastically about the kind of citizenship that could build “African nationalism”, through encouraging the development of an African identity in the school classroom. Central to their problem representation is the notion that the absence of substantial African content (pre-colonial and post-colonial) and the nature of “liberal historiography” (2018, p. 47) in the higher phases of schooling has resulted in a lack of a sense of “African identity”. It is this liberal historiography that they hold responsible for misrepresenting African nationalism. “The content on nationalisms reads like the Truth and Reconciliation Commission (TRC) findings, it gives the impression that African nationalism is as flawed as Afrikaner nationalism” (p. 46). The report goes on to imply that a more natural and appropriate reading of African nationalism would be that framed by the philosophy of Ubuntu, which highlights “human sympathy, human rights, social justice, love, willingness to share, and forgiveness. On this basis we learn to establish humane, respectful relations with them, and that as humans we are linked to a wider universe and spiritual world.” (p. 47). The HMTT discussion about African nationalism is detailed, and concludes,

The other racial groups in South Africa have no reason to fear or oppose African nationalism precisely because the freedom of the black majority will also be their greater freedom ... African nationalism will bring about the necessary psychological condition that will contribute towards the building of a non-racial, democratic South Africa (p. 47).

This statement is not explained at all. The emphasis in the report on the way in which the History curriculum should promote African nationalism within the framework of an Ubuntu philosophical historiographical tradition is for the HMTT a way of linking citizenship with identity, specifically African identity and with African nationalism.

Sicakkan's (2015) notion that nationalism depends on past stories to build its narrative is implicit in the DBE proposal. The DBE wants to call on past stories to promote citizenship and an African identity, as it encourages History teachers to tell hero stories about the liberation struggle, and to bring in the long history of the African continent. The DBE documents are clear in their recommendation that African nationalism is a good thing, informed as it is by the Ubuntu philosophy (HMTT, 2018). It also closely aligns to the SADTU document that was presented to the DBE in 2014. At the same time, however, the DBE is promoting the new story of a democratic South Africa, and thus draws from what Sicakkan refers to as "republican modes of belonging" that focuses on the future rather than the past (2005), what Lister (1998) says converges with patriotism. It is likely that the current ANC governing party in South Africa is more attuned to this republican view of citizenship and nation-building, as they explicitly design policy in an attempt to overcome the racially riven past and build some kind of social cohesion. This is the discourse that is apparent in the DBE's urgency to use a nationalist Afrocentric telling of history to a captive audience of youngsters in South African schools.

Whether or not one agrees with the interpretations around nationalism presented, especially by the HMTT, what is key is the way that they have represented the problem of social discord as being one of a lack of identification with African nationalism, which would be remedied by a combination of increasing content about pre- and post-colonial Africa, including highlighting the story of the Pan Africanist Movement, presented in a way that actively promotes human solidarity across the continent. The HMTT report elaborates,

*The CAPS content has been organised in such a way that South Africa has been separated from the African continent and the world. This is unfortunate considering the deep-seated misconception of South African exceptionalism and the growing problem of xenophobia" (p. 48).*

The way in which the DBE has linked citizenship into the way that they have represented the problem of (African) identity and (African) nationalism, can, according to their proposal contribute to social change by developing a particular kind of citizen with a strong sense of African identity that will be instrumental in "cementing the project of nation building, social cohesion and reconciliation" in South Africa. The best place for this to happen is in schools, in the History classroom.

### *Nation-building*

The link between the above clan of notions - citizenship, identity and nationalism - translate into action through nation-building. Mylonas defines this as "... the process through which the boundaries of the modern state and those of the national community become congruent. The desired outcome is to achieve national integration" (2020, para. 1). This is what the Motshekga refers to as "project of nation building, social cohesion and reconciliation" (2015, para.10).

Minister Motshekga stated in her speech to the History Roundtable, to justify the plan to make History compulsory, "It is only through History as a subject that we can promote the principles of non-racialism, non-sexism and the supremacy of democracy over anarchy" (2015, para. 15). She has constructed the problem in a way that makes the key interventions to be about race and gender, two issues that were highly visible in the news of the day: race-based and identity-based violence and gender-based violence. Coming together in an active show of nation-building becomes the solution. Pushing for compulsory History, she says that the objective can "*only*<sup>21</sup> be achieved through History" (2015, para. 15). Embedded in this is the discourse around the power of education, the power of the selective story, the assumption that learners are easily moulded in the classroom. Nation-building as an action is a political construct, deriving from how the idea of nation is constructed. Whether it is an imaginary nation (envisaged in the Constitution) or one built by the past (through the inclusion of African stories) is less important than the fact that it is the present that the DBE seeks to rescue.

*So, what is the problem represented to be?*

The above discussions present a discourse articulated by the DBE through public speeches and policy proposals that clearly represents the problem as one that is characterised by the urgent need for citizenship, identity, nation and nation-building, and Afro-centric nationalism as a means of countering socio-political unrest and challenge to the ANC-led government. The DBE's solution to ensure that this succeeds is to enact a policy of compulsory exposure to a specific kind of History that will "mould" citizens that are soldiers of "nation building, social cohesion and reconciliation". The intention to make this a policy shows that the DBE finds this to be a necessary precondition of a successful future for the country. The discourse is inconsistent: at once speaking the language of liberation and critical thinking for democracy, while expressing the need to mould, and enforce and control, to push for allegiance to the ANC. That *enforcing* these "imaginary" concepts on the *demos* is by definition anti-democratic

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<sup>21</sup> my emphasis

aligns with the lack of transparency inherent in the policy making process, and the predetermined discourse exposed in the TORs for the appointment of the HMTT. It is also notable that the policy-making process also exhibits the same tendencies. On the one hand, there is a veneer of democratic consultation, but in truth, the decision was made even before the HMTT was appointed (despite what Motshekga said), as evidenced in the way the HMTT terms of reference were formulated.

In the next part of this analysis, I will look at how the way in which the proposed compulsory History proposal has been problematized indicates a number of basic presuppositions and assumptions. The problematisation together with the presuppositions and assumptions will result in focussing attention on some contributory factors while excluding others. Bacchi refers us to the significant silences, or gaps that come from particular problem representations. Together these baseline factors lead to effects.

### **Presuppositions, Assumptions, Influences and Silences**

In her WPR tool, Bacchi developed three questions that follow directly from having defined the problematisation, or representation of the “problem”. These follow-up questions probe the presuppositions and assumptions, the contextual influences as well as the silences implicit in particular representation of the problem. Question 2 is phrased as follows: “What presuppositions or assumptions underpin this representation of the ‘problem’?” (Bletsas & Beasley, 2012, p. 21) She speaks of this question as serving to enable a “reflection on the underlying premises in this representation of the ‘problem’” (Bletsas & Beasley, 2012, p. 22). Question 3 asks that we examine how the particular “Representation of the ‘problem’ come about” (p. 22). I will do this by referencing the contextual factors, including salient forces/events/concerns that have led to the particular problematisation for which making History compulsory is the best “solution”? The fourth question directs out attention to “What is left unproblematic” (p. 21) in the particular representation. In other words, what is the problematisation silent about? What is in and what is out are consequent to the problem representation, and equally important in unpacking how the DBE understands the need for their proposal. By grouping these three questions together, I aim to lay the basis for a subsequent analysis, which I will do in Chapter 5 of this thesis.

A range of associated themes based on apparent presumptions and assumptions embedded in the DBE proposal emerged from my analysis of the three selected texts. Some of these themes relate to the proposed policy itself and some to the process of policy making. The most obvious theme is that which tasks school History with transforming socio-political behaviour in respect of nation-building and identification with an Afro-centric heritage. Other major themes that emerge include the way in which broad systemic issues are approached, how teacher development is understood, the nature of what the History programme is and should be, and the policy-making process itself.



### *School History's Herculean task*

In chapter 2, I discussed a range of contextual and conceptual factors that impact directly on the overall topic of this dissertation, namely the massive, possibly impossible, task of loading school History and History teachers with the responsibility of transforming socio-political behaviour in South Africa in respect of nation-building and identification with an Afro-centric heritage. Key aspects discussed included developing an understanding of concepts such as identity, citizenship, nation and nation-building, including how these concepts intersect with each other. I also discussed education in general, education as pertaining to South Africa, History education in general and History education as pertaining to South Africa. Finally, I discussed the broader economic and socio-political context, with an emphasis on the period after 1994, particularly after 2007. In this contextual profiling, it emerged to me that a key reason for the DBE's enthusiasm for making History compulsory was to contribute to a national government effort to halt a growing disillusionment with the ANC-led government. This disillusionment was expressing itself increasingly loudly and aggressively as public protest in the streets, at schools, at universities, and violent xenophobic attacks, as well as uncontained, opportunistic criminality parading as public protest. In the section above, I have shown how these factors are central to how the DBE has represented the problem. They have identified the need for a more compliant and engaged citizenry that buys into the "democracy project" managed by the ANC-led government, and the need for South Africans to identify as Africans who share a common experience of colonisation from which they must be freed. To solve this set of problems, compulsory History as the solution. That this problematisation has defined the rationale expressed by Minister Motshekga and the HMTT is clear.

There are massive presuppositions and assumptions built into this idea that History teachers in our marginally functional schools with all their challenges could or even should be lumbered with the task which by rights belongs with our democratically elected governors. The assumptions are detailed in the discussions that follow regarding the governance system as a whole, teacher development, the History curriculum and delivery, policy-making as a whole, and even international trends. However, over and above these aspects, is the outsize presumption that History teachers and the schools within which they work should carry this heavy responsibility, this mammoth task. Then there is the presupposition that it is even possible to expect this and to align this task with the kind of democracy that is enshrined in the Constitution. An additional presupposition is that the DBE will be up to the task of making it all happen, as per plan. Finally, there is the assumption that teachers and teacher trainers will be able to do this intricate task in this particular context, with all its complexities and limitations.

Minister Motshekga's 2015 speech (and her subsequent statements) and the HMTT Report is big on rhetoric, but absolutely silent on how the details of this task can possibly deliver on its own expectations.

### *Systemic issues*

At the systemic level, a plan as far-reaching and with the kind of strategic objectives as the compulsory History plan, can only succeed if its implementation is considered within the bigger system within which it is located. Some key factors include whether the budgetary implications have been evaluated, whether the education system in place in South Africa is sufficiently robust and flexible to accommodate the proposed change, and whether the range of schools within the system are able to embrace the change in a way that adds value to the learning experience.

In examining the three documents it is clear that the biggest assumption that was made was that the system could embrace the proposed change. A few constraints were identified by the HMTT, “capacity, teacher training, content, textbook alignment, planning, as well as budgetary and cost implications” (2018, p. 130).

### Budgetary implications and prioritisation

With regard to budgets, the HMTT Report notes that budgetary implication will need to be considered carefully, and that a phased approach would be recommended, so that teacher training could be addressed. Their timeline is surprisingly short: “Compulsory History to be phased in incrementally from 2023 (Grade 10) to 2025 (Grade 12)” (HMTTa, 2018, p. 3). This is hardly long enough to secure the finance for the implementation plan, not to mention the actual implementation.

Implicit in the recommendations is the assumption that the national fiscus can and will meet the costs associated with the DBE training and employing thousands of new teachers, providing additional support through subject advisors, managing the assessments, as well as the providing the range resources needed to perform the task, from classroom space to textbooks. Added to this are a range of other unspecified costs from examination costs to departmental administration costs and the like. In short, the costs are likely to be significant.

It is not clear why this calculation was not specified as a key deliverable of the Terms of Reference of the HMTT assignment. Being able to secure the finances is a critical success factor. A further critical success factor (aligned to securing finance) is the support of other government mandates and departments. It is possible that there was limited consultation across departments at the outset of this planning process. The unavoidable and avoidable processes of consultation that happen in the administration of government is worth noting. It is likely that the decision to consider the plan in the initial stages should have been prefaced by a consultation with the National Treasury. I have found no evidence that this happened. As pointed out by Thornhill (2005), in a representative democracy, the mechanisms of political administration are highly complex and particularly cumbersome, making full

and ongoing consultation difficult. This has often resulted in high levels of silo-isation in practice, where different government departments and mandates do not confer adequately, or at all, even though we have Cabinet and portfolio committees for that express purpose.

Thornhill also reminds us that prioritisation is a major determinant of what gets support in the decision-making process. While we are aware that Motshekga briefed the legislature and received sufficient support for a government gazette to be signed off on the appointment of the HMTT, it is not clear what discussions happened regarding the possible implications of the plan prior to the appointment, or in response to the submission of the Report by the Minister in 2018. We know that the Minister was empowered to re-appoint the HMTT in late 2018 to investigate how the proposal could be implemented. It is not clear where that process is currently in respect of completing the task.

Added to the administrative aspects, are the political pressures that pertain all the time, and they were certainly evident in and around 2014. In Chapter 2, the socio-political context was described in some detail. There is no doubt that these factors, including the pressures from SADTU to make History compulsory, influenced the haste with which the task was initiated, with the lack of due diligence in respect of financial factors.

What the HMTT and Minister Motshekga are silent about is what exactly the financial implications could be, and where exactly the government would find the money for this significant change, including how funds would necessarily have to compete with other mandates, and how this would be handled, and what the impact of this will be.

#### Flexibility and adaptability of the current education system in South Africa

The discourse inherent in Minister Motshekga's speech tends towards being populist, full of references to (ironically western) philosophers emphasising the dangers of not knowing one's history, which she extrapolates into compulsory school History. Nowhere in her impassioned speech is any acknowledgement of the massive task she is talking about with all its ramifications. The state of education is described in some detail in Chapter 2. Our education system is barely functional as it is. There are fundamental challenges at even a fundamental level from totally inadequate infrastructure in multiple schools to extremely poor grading of the standards of our foundation phase learners in the basic skills of literacy and numeracy. Minister Motshekga over-simplifies the proposal, as if it is relatively simple. The proposal made by the HMTT, while it acknowledges that the task is difficult, nevertheless recommends that it should be done and that it can be done phased over a few years. This assumption is that such a proposal is not only essential, but is also doable.

The Minister and the HMTT are silent about the inherent weaknesses of the DBE to manage the multiple and profound challenges within this sector. Consequent on this are questions about how the DBE will adjust itself to accommodate the kinds of changes that the compulsory History proposal anticipates. This includes not only the rapid development of an appropriately capacitated cohort of History teachers, to be deployed at all schools across the land, the development and distribution of new and revised learning materials, but also whether the department at a systemic level is able to take one learning area and repurpose it for objectives that are not clearly spelt out. Aspects of this gap in the proposal are addressed in different ways later in this analysis under specific headings such as teacher development and History programme revision. Systemic challenges have real implications for the success potential of this proposal.

### Unequal quality of schools

Implicit in the DBE proposals is the assumption that the compulsory History plan can be delivered with equal results throughout the country. Another critical systemic issue that is relevant to the discussion of the compulsory History plan relates to the profound disparities in education facilities in South Africa, especially at a school level, but also at a tertiary level. While the post-1994 government has always had as a core objective written into the Constitution and the National Education Policy Act of 1996, the aim to eliminate these disparities, on the basis of basic human rights as well as on the basis of economic development (McLaren, 2017), this is yet to happen (Mohamed, 2020; Spaull, 2019). The range of quality from quintile 1 to quintile 5 schools is enormous. Essentially schools located in resourced areas are likely to offer a reasonably good standard of education, delivered by qualified and capacitated teachers, while those located in marginalised areas are likely to offer a highly compromised product (Mohamed, 2020; Spaull, 2012; Vally, 2019).

This gaping silence regarding the significant disparities in quality of schools is not addressed at all. Nor is how the proposal to make History compulsory can fit into this compromised system.

Also related to quality issues, the investigation and recommendations regarding compulsory History delivers no comment on how learners will be impacted in relation to their matriculation results should the plan go ahead. If History is compulsory, it is likely that many (maybe most) pupils will not be taking this subject because it aligns with their interests or aptitudes. The drop in popularity of History has been well-researched, showing increasingly that the subject is neither favoured nor deemed useful by learners and parents (Asmal et al, 2000; Bam, 1993; Fataar, 2000; Kalloway, 2000; van Eerden, 2012; Wasserman, Maposa & Mhlono, 2018). This means that it is realistic to say that assessment results that are achieved by learners are likely to be compromised. As a 20-credit subject, poor performance in

the exit examinations will impact on learner APS totals in a way that does not currently happen with Life Orientation.

### *Teacher development*

Teachers will be the delivery agents on the coalface of the compulsory History plan should it be implemented. This places thinking through how to ensure that there are sufficient appropriately capacitated teachers at the front of the planning process. After finance, this factor is the biggest potential threat to the proposed plan.

Given the scale of the proposal, that History should be compulsory in all schools across the country, the need for an extensive teacher development programme will be massive, with teachers needed for all phases. In addition to making it compulsory in the FET phase, the HMTT Report (2018) recommended that the Social Studies in the General Education and Training (GET) Phase should be disaggregated into History and Geography to ensure that specialist teachers are teaching History. To address the requirements for more teachers and appropriately skilled teachers, the HMTT makes three initial suggestions: Firstly, all “Prospective teachers should study History as one of their majors at undergraduate level” (2018, p. 131). Secondly, that the Department of Basic Education should provide bursaries for trainee History teachers to “address the challenge of human resources in the subject through the Funza Lushaka scheme”. (2018, p. 132). Thirdly, that teachers need to be appropriately trained to deal with the rigours of the subject that embraces content knowledge and historical thinking skills. These suggestions grossly underplay the extent of the challenge in this aspect<sup>22</sup>. By its own counting the HMTT estimated that there were 6484 who qualified as teachers in 2016 with History in their degrees (2018, p. 122). For the same year, the DBE published that there were 25 574 schools in South Africa (2018, p. 3).

The Minister and the HMTT Report are silent about how the *scale* of this project will be executed in respect of building a large cohort of teachers by the time they wish to introduce this in 2023. There are no clear guidelines to address just how to get the required numbers of teachers in place, never mind have them skilled to deliver the kind of curriculum that the HMTT dreams of.

The HMTT describe in detail how prospective teachers must be appropriately skilled to teach not only the extensive content suggested, including archaeology and oral traditions, but also a complex set of

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<sup>22</sup> The same HMTT has been reappointed and one of the expectations is that they will, “propose History Teacher development programmes for both Initial Teacher Education (ITE) and In-service Teacher Education.” (SAG, 2018)

historical and critical thinking skills, such as multi-perspectivity, judgement, analysis, synthesis and the like. Beyond the general content factors, there are a number of aspects related to teacher development that are not addressed, that could undermine the plan fundamentally.

#### Existing History teachers

The DBE has assumed that the Continuing Professional Teacher Development programmes could be used to upskill existing teachers. What it does not say is how this will happen, where the resources will come from, how teacher training service providers will be impacted, how this programme will develop the capacity to deliver on the demand, in terms of human resources, content material, skills development, and the like. It also does not address how teachers will respond to this requirement. In a study carried out in the Western Cape, the following finding was tabled, “The study highlighted the lack of participation of teachers in CPTD due to human, material and financial constraints. Urgent consideration needs to be given to eradicating these barriers for continuous professional development of teachers” (Mettler, 2016, p. 49). Teachers in Mettler’s study also spoke of the stress of attending teacher development programmes “after a long day’s work at school, having to deal with overcrowded classrooms, and with learners who lack discipline, too much administrative work, no free periods and not enough resources to use in the classroom” (p. 50). It is no secret that teachers, especially in lower quintile schools are often forced to operate in survivalist mode. The success of any change depends on how the participants engage with it.

#### Additional History teachers

The only mention made in the HMTT Report regarding recruiting new teachers relates to the provision of state bursaries, and the recommendation that *all* prospective teachers should take History as a Major subject (i.e. to third year level). No mention is made of how the requisite high numbers of trainee History teachers will be mobilised, especially as History has never had a high profile either at schools or at universities. Learner numbers for History teaching have never been particularly high especially in state schools. Every History teacher will tell stories of how difficult it is to persuade Grade 9 learners to take History as a matriculation subject. More often than not their reasons are that it is about learning reams of facts and dates that it won’t help to get a job, that it is boring, that the teacher is boring.

History has for some decades been seen as a dying subject. There are many schools in South Africa (and internationally) where History is not even offered. The HMTT reports that in the course of their consultation process they found numbers of schools where History was not offered (2018, p. 114). Research carried out by Wasserman, Maposa and Mhlongo in 2018, revealed that rural learners saw no value in taking History,

*... the data revealed ... that mathematics, physical science, and commercial subjects, rather than history were favoured. The reasons for this centred on taking subjects that were viewed as leading potentially to decent jobs or funding to study and therefore being advantageous to the future prospects of the learners in an urban setting. This mind-set was reinforced by teachers, parents, older siblings, the state, and the formal economy (p. 55).*

Van Eerden notes that in 1973, approximately 46% of matriculants took History which number dropped to about 24% in 1992 (2012, p. 34)<sup>23</sup>. The commercialisation of education is such that learners (and teachers and school principals) struggle to see the value of History. The few career paths that can directly be associated with History are on the lower end of the interest spectrum of the average school leaver. Even the HMTT report is lukewarm in its attempts to make it sound exciting when they say that it is,

*possible for [learners] to become policy analyst enrolled in Development Studies at university; a bright future also beckons for these learners to follow careers as economic historians, sociologists, social anthropologists, economists, archaeologists, diplomats and political scientists. Furthermore, History learners have a future in the fields of arts, culture and heritage (2018, p. 58).*

This is hardly likely to result in a stampede of school-leavers wanting to become History teachers.

These statistics are indicative but they are not peculiar to South Africa<sup>24</sup>. In recent years, the status of History has diminished in an education system that pushes neoliberal interests, in which (Science, Technology, Engineering, Mathematics (STEM) subjects are valued far higher than those within the humanities. This suggests that mobilising History teachers will be no easy task.

With the proposed revisions to the History curriculum, the quality of teaching will need to be higher than normal, given the inherent and sensitive challenges involved in teaching nation-building and

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<sup>23</sup> Van Eerden notes that there is very little research done on these statistics regarding learner interest in History as a school subject.

<sup>24</sup> In 2009, the Guardian reported “Secondary schools study warns the subject could disappear from the syllabus” (<https://www.theguardian.com/education/2009/sep/13/secondary-pupils-drop-history>). In 2014, The independent asked “Why are fewer pupils studying history, and what can be done about it?” (<https://www.independent.co.uk/news/education/education-news/the-big-question-why-are-fewer-pupils-studying-history-and-what-can-be-done-about-it-1691115.html>). Kohn reports on the situation in America, in an article entitled, *The future of the historical profession*, “There is much evidence to support the interpretation that history has declined,” (1989).

identity-based conflict narratives in a heterogeneous and traumatised school classroom. The selection of appropriately able teachers will likely become an issue.

### History teacher training programmes

The proposal assumes there is sufficient capacity at existing teacher training facilities to train teachers equal to the task. The HMTT in its Executive Summary speaks of “universities and colleges [producing] History educators with sympathetic and informed understanding of humanity and the human condition” (2018, p. 4). They are silent about the specifics of what this means in practice, both logistically and pedagogically. The documents are silent about whether institutions of higher learning have the capacity to absorb the numbers of trainee teachers required, especially if the HMTT suggestion that all prospective teachers be required to “take History as a Major” (2018, p. 131). Some universities no longer even have History faculties. In many cases History has been absorbed into other faculties. Teacher training colleges at the different institutions of higher learning have likewise reduced History faculties including staff.

It will be difficult and will take time to reverse the trend. Linda Chisholm (2018), reacting to the HMTT Report, points out the challenge in this regard. Positing that the HMTT has “underestimated” the task at hand, she points to the dramatic funding cuts in recent years to universities, pointing out that these cuts have affected teacher training programmes particularly badly due to internal prioritisation that did not favour teacher education. She reports on research she carried out in 20 universities that found that the existing teacher training schools would *not* be able to rise to the demand. The challenges of not being able to source requisite staff would result in lower grade teacher development. In addition to staff, curricular at these training institutions will have to be amended and appropriate courses will need to be developed in line with the proposed changes.

Tibbitts and Weldon offer this into the discussion,

*We suggest that it has meant that the burden of making the promise of a new South Africa happen through education has fallen largely on teachers, who have not been adequately supported in carrying out their role as the intended mediators of transitional justice processes in the classroom. We argue that in South Africa’s transitional justice environment at least three dimensions of teacher support were necessary for implementing the new history curriculum: training on new content and pedagogy; upskilling for teachers poorly prepared as consequence of the apartheid-era credentialing system (combined with a deep transformation of the segregated schooling system); and opportunities for teachers to consider their personal legacies from the apartheid era (2017, p. 444).*



### *A revised History programme*

This discussion of a revised programme includes different aspects, including the curriculum development (curriculum design – content and skills, learning resources, assessment) and curriculum delivery (pedagogical factors, including skills development within the History classroom – critical thinking skills, historical thinking skills, historical writing and communication skills). It applies to syllabi across the grades.

The Minister and the HMTT Report both speak of the need to build a curriculum that achieves multiple benefits including to “empower young people with the ethos of the new South Africa as enshrined in our constitution thus cementing the project of nation building, social cohesion and reconciliation...” (Motshekga, 2018 para. 14). The Minister goes on to state that the curriculum must, “promote the principles of non-racialism, non-sexism and the supremacy of democracy over anarchy” (para. 15) and that it must be “relevant not only for the market place but also for the decolonisation of the mind” (para. 34). Adding to this list of requirements for the revised History programme, the HMTT (2018) refers to the fact that the CAPS syllabus must be totally overhauled so that “Africa centeredness becomes a principle in revisiting the content, and in particular bringing both ancient history and pre-colonial African history into the FET curriculum.” (p. 132), criticising current syllabi for “marked depletion and fragmentation of credible content, concepts and methods which are foundational to African history” (p.72). The HMTT puts forward that “Archaeology be included in the curriculum as a way of deepening the understanding of African history” (p. 63). Aside from these content issues, the HMTT report goes into extensive detail about what historical and critical thinking skills must be embedded in the History curriculum.

There are a number of assumptions in the proposals made by the DBE and the HMTT in relation to the curriculum, but primary amongst these is the notion that changing the curriculum by including more African content will achieve decolonisation of the curriculum, and what Motshekga describes as “decolonisation of the African mind” (para. 34). The HMTT suggests that this can be done through increasing African content, by reversing the “marginalisation [of the] 100 000 years of human biological, social and cultural History that unfolded on the African continent” (2018, p. 72), reducing the European History and the Western perspective and bias that the HMTT claims that the current CAPS programme is infused with, as well as by teaching critical historical thinking skills.

What is silent in their proposal is how exactly a revision of the African content and the approaches or paradigms used to teach African history would transform the outcome of the curriculum. Bailey (who is a seasoned History teacher and teacher trainer) has done a comparative analysis of the CAPS syllabi

for Grades 4-9, representing the current phase in which History is already compulsory. As a comparative, she reports on research that she has done that demonstrates that

More than half the topics focus on South African and African history exclusively. Where South African history focuses on colonialism and apartheid, it tends to look at the impact colonialism had on indigenous societies, slaves and indentured labour, as well as case studies of resistance to colonialism and apartheid. It certainly does not approach it from a white supremacist stance. Where European events or global themes are studied, these are directly related to the impact these developments had on South Africa or draw on South African examples in the case of broader themes. Exceptions are the last four themes: the World Wars, Cold War and Transatlantic Slave Trade. (2017, para. 6).

Bailey also points out that there are practical reasons why the syllabus is, in real terms, at best a guideline for what actually happens in classrooms. She points out that many teachers do not cover the whole syllabus because of many reasons including the sheer volume of the syllabus. The HMTT suggestions add volume to the existing curriculum, in content and then a whole lot of new skills. How then, will teachers cope? Which parts will they leave out? What then of Minister Motshekga's objectives?

In the meantime, the HMTT has been reappointed to develop a new History curriculum. It is not clear how they will go about this other than the requirement in the TORs for this new task to "i. conduct a research study on how best to implement the introduction of compulsory History in FET schools as part of citizenship located within Life Orientation; ii. Strengthen the content of History in the FET band;" (SAG, 2018, para. 3).

Both the Minister and the HMTT refer to the need for critical thinking skills and historical thinking skills. Implicit in this are the skills (mentioned by both) of how to think about the past, critical thinking and judgement, reading, selection, comparison and synthesis of facts and opinions into coherent and informed argumentation, of composition and communication, of independent thinking. These are skills that are implicit in *how* teaching takes place. The HMTT Report provides no insight into how historical thinking skills can be infused into the programme, just that they are essential. History teaching in overcrowded classrooms with limited access to resources has never really got this right. Unless these conditions change, it is unlikely to change.

Revising the programme requires both examining the curriculum development (curriculum design – content and skills, learning resources, assessment) and curriculum delivery (pedagogical factors, including skills development within the History classroom

### Curriculum development and resource development

The way in which the DBE has indicated the need for the “complete overhaul” of the curriculum of both the GET and FET phases, assumes that it is possible to do this to a quality standard in the timeframe they have indicated – beginning in the next two years. The reappointment of the HMTT in December 2018 is designed to address this matter. According to the South African Government website, the same team has been reappointed to:

- *To develop a new History curriculum from Grade 4 to 12;*
- *To conduct provincial consultation in the education sector and obtain inputs into the new history curriculum;*
- *To screen textbooks to ensure alignments with the new curriculum; and*
- *To propose History Teacher development programmes for both Initial Teacher Education (ITE) and In-service Teacher Education. (SAG, 2018)*

The most obvious gap in the HMTT report recommendation relates to how exactly this change would be implemented, especially in the short time frame, other than the fact that the same task team that prepared the 2018 report have been reappointed to develop the curriculum. It is not clear what criteria will be used in developing the curriculum, other than the generalised comments discussed above, or who will carry it out. It is not clear how citizenship education will be integrated into the curriculum, nor how nation-building will translate into the programme. It is not clear whether or how historical skills will be integrated into the curriculum. It is not clear how resource material will be developed nor by whom. It is also not clear how teachers in schools will receive the revised curriculum and associated materials, including textbooks. The DBE has a tragic history of not delivering textbooks and other learning resources to schools, especially those in outlying areas, which are the very schools that need it the most. Year in and year out, there are debacles related to textbook delivery.

The timeframe that is put forward by the HMTT (2018, p. 133-134) is totally unrealistic. They suggest the following:

- 18 months to redevelop the curriculum framework with specified outcomes of the history curriculum for GET & FET in consultation with “archaeologists, historians, educationists and history teachers ... universities and training centres” (p. 133).
- 12 months to present the curriculum including content and aligned skills, as well as to “establish whether facilities can provide training” (p. 134).

- 12 months to “Assess and test the curriculum” through convened workshops with “teachers ... subject advisors, trade unions, and textbook writers, universities and other training facilities” (p. 134).
- 12 months to commission, write and publish learning materials, including textbooks.
- 24 months concurrent to above two activities to commission, develop and deliver in-service training to existing teachers.
- 12 months (after above five activities) for new teachers to be trained along with provision of “In-service training for Grade 7 teachers”
- After the above approximately five years the full programme will be implemented following the Grade 7 introduction in year five.

There is no precedent in South African education delivery of this kind of speed of delivery. The HMTT provides no indication as to how this proposed delivery plan for compulsory History will be managed.

#### Curriculum delivery

Closely associated with teacher development and curriculum development, are factors related to how the curriculum will be delivered in the classroom, i.e. what the most appropriate pedagogy for this revised approach would be.

Assuming that History is widely taught is misleading. As mentioned previously, there are many schools in South Africa that do not even offer History as a subject, either because learners choose other subjects, or because specialist teachers are not available, or because the School Governing Bodies (SGBs) have approved different subject choices. In many other schools, History is currently taught by non-experts.

The DBE has so far assumed that both existing and new teachers will be able to embrace and deliver a completely different pedagogic approach appropriate for teaching critical thinking, practical citizenship for democracy along with maintaining a content focus. In making this assumption, the DBE is silent on some of the implications of wanting to repurpose the teaching of History for social cohesion and democratic practice in a way that has never happened before. There is no indication in the HMTT report that the pedagogy of teaching for democracy has been considered. Any classroom teacher will report on the difficulties in teaching cognitive skills such as critical thinking, both because they are abstract and because they take practice time, and time is a teacher’s scarcest resource.

If the purpose is to use History to assist build the kind of citizenship that results in nation-building for the purposes of deepening democracy, then it follows that the pedagogy used should reflect this objective. Most existing teachers have neither learned in this way nor do they teach in this way currently. Most prospective teachers have never experienced this approach to learning. Most teacher training

institutions do not deliver their learning programmes in a “democratic” way that encourages active participation (like active citizenship). Rather, the approach is typically teacher-centred, and non-participatory<sup>25</sup>.

The kind of pedagogy that is premised on "critical thinking" and "democracy" is unfamiliar and assumes a change in teacher training and teacher practice. Teaching History for purposes of building “social cohesion, nation-building and reconciliation” (Motshekga, 2015, para. 14) in a country riven by identity-based conflict in socially heterogeneous classrooms will require particular skills and sensitivities. The expectation that History teachers should take on the full burden of rescuing the democracy project and building social cohesion is unfair, especially if teachers are not appropriately skilled.

Tibbitts & Weldon talk about the challenges of modelling and teaching “transitional justice” (2017, p. 442). Nussey (2018) writes that History teachers will need to reflect on and address her own sense of identity, socialised norms and prejudices. According to Tibbitts & Weldon, teachers will need trauma management skills; and the skills and confidence to manage such issues of emotional reactions from learners (and even parents). They will need to skilfully facilitate multi-perspectivity, self-reflexivity, mutual respect, reflection and synthesis of highly sensitive and emotive interactions in their classrooms, without fear or favour. These are high-level, complex psycho-social skills, and are not the skills provided to teachers in their teacher training programmes.

While the themes discussed above all relate to how the proposed policy might be implemented, it is also worth examining the policy-making process itself to see what it reveals about the assumptions, influences and silences of the proposal.

#### *Policy making process*

Earlier in this report, I have presented a descriptive narrative of how the proposed compulsory History proposal came into being, with some additional discussion about how policy-making in South Africa happens. What is clear from that narrative is that there was a degree of urgency in the initiation of the process on the part of the DBE. This may be responsible for some of the glaring gaps and missteps in the process and the product.

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<sup>25</sup> Of course, there are pockets of difference, but these are typically in private schools and uncommon instances in tertiary institutions.

### Urgency is not democratic

We know that the broader context within which the compulsory History idea was hatched was one of extensive socio-political unrest, with considerable pressure from various quarters including the influential teachers' union, SADTU, on the government to address the issues. The DBE made what appears to be a very quick decision to take on the idea that revising the History curriculum to make it Afrocentric and to make it a compulsory school subject from the Intermediate Phase to the FET Phase would address the problems. Within a month, the matter was presented at the First History Roundtable, discussed in parliament and three months later a History Ministerial Task Team was officially appointed to "oversee the implementation of compulsory History in the Further Education and Training (FET) schools" (SAG, 2015, p. 1). We should ask what was so urgent.

The problem representation implicit in all three texts that span the policy making process, is that the problem was one that demonstrated the *urgent* need for citizenship, identity and nation-building, which would be best done in schools, so that all citizens would be subject to it at an early age, before they became voters. In this way they would not challenge the government, as their loyalties would be shaped by understanding the heroic struggle of the ANC to secure the freedom enjoyed by the public.

The assumption in the urgency is that the government knows best what is good for the citizens, therefore it has no need to consult, to check in, but rather that it should think for citizens especially when the pressure is on. We know that the context was indeed pressurising, and that there were citizen actors (such as SADTU) who were pushing the idea with the government. Is this an acceptable justification to compromise the democratic process?

### Urgency can be careless

Associated with the haste with which this process was initiated, is a further assumption that bears consideration, being that the idea to make History compulsory will be popular and doable, and therefore does not need extensive consultation and debate. A further assumption is that the work of the HMTT was sufficient to guide the development of an appropriate policy and implementation plan addressing all possible implications of the proposal, and that no preparatory consultation was necessary. The lack of attention to detail is likely the cause of the extensive criticism that the policy proposal has attracted from a wide range of especially professional circles.

### Consultation

How the consultation process was conceptualised is the next significant silence in the policy process. The HMTT held nine provincial stakeholder meetings (2018). It is not clear how these were convened, who was invited, whether all the attendees were representative of the sector, or how the meetings were

facilitated, recorded or analysed. The HMTT Report provides a collation of comments harvested from each meeting. It is not clear how these comments were selected for inclusion into the report nor how they were factored into the findings. It is not clear what happened to all the other comments. Since the publication of the report there have been many critiques published by stakeholders from the education sector, many of whom have raised key issues and questions about the proposal and the process. Given the scope and scale of the proposal, the many insights could for the least enhance the implementation strategy, or even challenge it constructively. There is no evidence to show how these professional, invested critiques impacted on the second phase of the HMTT work after their appointment in 2018.

There is also little evidence that describes how the HMTT report was fed back to even those that were consulted as part of the first HMTT assignment. Sharing the findings at carefully orchestrated report back sessions might have yielded even more powerful data to support a rational, practicable and desirable finding. That the consultation process was flawed in its design is a key problem undermining the veracity and reliability of the HMTT process, and raises questions about the integrity of the intention, the process and the findings.

#### Policy-making as a process

There are multiple assumptions and silences in the policy-making process, in respect of the compulsory History proposal. These include how the process was actually initiated and designed; who was involved, and who were the influencers; and how the process unfolded; how the timeframes were arrived at, and also, critically, how the DBE would actually achieve the desired outcomes of citizenship, nation-building and reconciliation through the proposed plan. All of these factors are underpinned by the assumption that examining all of these aspects *before* the development of the HMTT terms of reference was not in fact necessary, that it was the prerogative of the Minister and a few others to decide that this was a viable and desirable idea.

The first silence refers to how the idea came to pass in the first place. I have been unable to track the process exactly from information that is in the public domain<sup>26</sup>, especially in relation to the early part of the process. The lack of transparency raises questions about the legitimacy of the process, and represents an inherent contradiction in the stated objective that the proposal seeks to deepen democracy

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<sup>26</sup>Disclaimer: I conducted no interviews in the course of this inquiry. I would have liked to have interviewed the Minister of DBE and the members of the HMTT to trace the history of how the idea was first mooted, and how it went from idea to the development of TORs to appoint the HMTT

in South Africa (Motshekga, 2018). There is an unproven notion that the decision followed directly from the significant influence of SADTU (Bailey, 2018; Bertram, 2020)

The second silence is around how the TORs for the HMTT were conceptualised, and who was involved in drafting them. The TORs of the HMTT were designed in such a way as to encourage the HMTT to assume that the decision had been taken already, and to investigate how best it could be implemented, by looking at precedent, getting ideas from education stakeholders, and overhauling the curriculum. The HMTT faithfully delivered on the TOR. They did not focus their investigation on whether the idea was in fact viable, but rather on what would need to be addressed in order to implement it<sup>27</sup>.

The next silence in relation to the process is how and on what criteria the members of the HMTT were selected. Only one member of the team had direct experience in curriculum planning. One is described as a Heritage and History Consultant. The remaining five are academics from History faculties at various universities. There were no teachers, no teacher trainers, no financial modellers, no publishers, no curriculum designers, not even any citizenship education experts.

#### *Alternatives to the proposed solution*

The DBE is silent on the subject of alternatives to locating citizenship education and nation-building in the History learning area. It is not clear whether any attempt was made to critically examine the way in which citizenship education was conceptualised in the Life Orientation curriculum and whether there was any way that this could be remedied in a way that met the concerns that ignited the idea to use History. There is a broad scholarship and practice of citizenship education to draw from. Many countries have these programmes in place. The United Nations champions a well-resourced programme. For reasons that are not clear the DBE has apparently not engaged with these, nor was the task to investigate this part of the HMTT terms of reference. It is possible that the reason why History was selected was because of how the problem was represented in the first place. The proposal was presented as being a solution to a problem of a lack of social cohesion, of a lack of civic obedience that could be addressed by a programme of managed nation-building because the citizenry were not sufficiently cognisant of their own history, which the HMTT blamed on a Eurocentric curriculum (HMTT, 2018). The solution to teach an Afrocentric narrative is seen as the counter to this, a way to build a strong public

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<sup>27</sup> It is outside of the scope of this investigation, but it is worth noting that the TORs for the reappointment of the HMTT after the submission of the first report, are similarly restricted. Suffice it to say that these TORs appoint the same task team, despite criticism that the team did not include any teachers, or financial experts. In addition, the tasks are an extension of the tasks described in the first set of TORs.



identification with Africa in general and South Africa in particular. Thus History is seen as a mechanism for identity building, citizenship for nation-building.

### *Repeating the same mistake*

It is difficult to understand why the DBE went ahead and reappointed the HMTT to continue with the process of exploring how to implement compulsory History despite the feedback that came back at them after the presentation of the first report, unless it was strategic to support a different agenda. With no due regard for the feedback, the HMTT was reappointed in 2018 to consider how to implement the plan and how to revise the curriculum accordingly. It is significant to note that in the phrasing of the Terms of Reference for the re-appointment assumes that the recommendations of the first process are accepted. It is also indicated in the press that with no lead-up, there is due to be an announcement in the coming week (after June 16) in which the revised History programme designed as part of the HMTT second appointment assignment (Businesstech, 2021)<sup>28</sup>.

### **Conclusion**

In this chapter, I have used Bacchi's first four questions to explore the problematisation that resulted in the proposal to make History a compulsory school subject. I have established that the discourse in the three documents is indicative of a problem representation that ties the proposed compulsory History proposal to a need for social cohesion, nation-building and an identification with an Afro-centric understanding of the past. It is highly likely that the influences and forces which framed this problematisation came from a context of political upheaval during which time the ANC-led government was being challenged from multiple fronts, with a narrative that basically was accusing the government of not delivering on the promises of the 1994 "revolution". People in communities demanded jobs, food, shelter, security. Unions called for higher wages and job security. At least one new political party emerged, espousing radical economic transformation to significant applause. Students in universities and schools demanded free education and a decolonised curriculum. Desperate and criminal elements in townships around the country turned on their African neighbours in violent and tragic xenophobic attacks. All this in a time of world recession. The ANC had hardly had time to catch its breath after the victory of 1994, and their task was impossibly huge. No doubt they were deeply worried. No doubt they needed to try and stabilise the shifting sands any which way possible. The discourse of the compulsory

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<sup>28</sup> <https://businesstech.co.za/news/government/497819/here-are-the-changes-announced-for-schools-in-south-africa-this-week/>

History drive echoed all of the contextual issues – Pan-Africanism, nationalism, decoloniality, education for growth development, and stories of the heroic struggles of the ANC liberators.

In examining the selected texts more closely, I identified a number of key themes that both indicate what was included in the problematisation, as well as what was excluded, and which de facto constructed the proposal in the way it was presented to the public in 2018. The key themes identified the following silences (with their attendant presuppositions and assumptions), all of which merit significant public debate:

- The actual viability of compulsory Afro-centric History resulting in active citizenship, social cohesion and nation-building, and a peaceful, orderly society.
- Issues at a systemic, or government, level, including budgetary implications, the degree to which the current education system in South Africa has inherent flexibility and adaptability to meet the proposed changes; the wide inequality of schools in all respects which will impact massively on the outcome of the proposed change; and issues to do with access to tertiary education based on admission points.
- Teacher development is probably the single biggest factor that will be affected by the proposal. This will include existing History teachers and the mobilisation and training of new teachers, which will affect training providers in multiple ways.
- The question of how History curricular will be revise, and by whom in what way will need to be debated, as will how this affects curriculum development and curriculum delivery, or appropriate pedagogies.
- The policy making process for generating the compulsory History proposal had major silences, which need to be considered to examine how they line up with promoting democracy, including broadening consultation and being aware of international trends.

The effects and implications of the problem representation and the “silences” will be examined in the next chapter. This will include tracking where, how and by whom this particular problematisation is being defended and championed.

## **Chapter 6. Concluding analysis of effects and impacts revealed through the WPR process**

### **Introduction**

Policy is a political act. So too is critical policy analysis. The key objective of this analysis is to understand the political import of the proposed plan to make History a compulsory secondary school subject in South Africa, and to make recommendations as to how to respond, both to the process and to the implementation, should it come to pass.

In this chapter I will draw from the previous WPR line of questioning, as well as the contextual content in chapter 2, to consider the effects and implications of the way in which the DBE has represented the problem that they suppose will be solved by imposing compulsory History on the school-going population of South Africa, using Bacchi's fifth and sixth questions? They advise that the "effects" of the problem representation be examined, and that we consider "How/where [and by whom] has this representation of the 'problem' been produced, disseminated and defended?" (Bletsas & Beasley, 2012, p. 21) and following from that "How has it been (or could it be) questioned, disrupted and replaced?" After considering these two WPR questions, I will then return to my primary research question, which is: What does a Critical Policy Analysis examining the discourse of the proposed compulsory History policy of 2018 reveal about how the current government is or is not promoting democracy in post-1994 South Africa through its policy decisions?

From having applied Bacchi's first four questions to an examination of the three selected documents in Chapter 4, I am able to make inferences about the problem representation and the implications that flow from that. This will enable me to conclude whether or not, according to my argument, what the possible implications of my findings are for the case of promoting democracy in South Africa.

### **What does the WPR analysis reveal about the policy proposal and the policy-making process?**

How pedagogic discourse for History is regulated reflects the "the way that a national curriculum understands the purpose of school history" (Bertram, 2020, p.5). Bertram virtually reformulates Bacchi in this statement. By aiming to regulate how History is presented in the classroom (make it compulsory, build in citizenship and nation-building, and make it Afro-centric), the DBE shows that it sees History as serving a particular (political) purpose (developing a citizenry that admires and gives its allegiance to the ANC, and is committed to social cohesion and nation-building, and consequently does not actively challenge the governance practices of the state). This has been indicated by applying a WPR analysis of the three texts of my study.

## Effects of the DBE's problem representation

The consequences of the DBE's problematisation are complex and multi-layered. On one level, it is superficial and there are so many gaps and potential implications that have not been considered, that the objectives identified by the Minister are bound to fail. At worst, the net result is the likely failure with massive associated wastages, coupled with an ideological *volte-face*, a betrayal of the democratic ideals of the Freedom Charter and the South African Constitution. At best, if it were possible to implement it in the way suggested by the DBE, the South African population might have a slightly better understanding of our collective history, and may have learned some historical thinking skills, and may be better able to participate in the destiny of our country in a somewhat more effective manner. It is highly unlikely that the effect will be a stable political environment with a citizenry that enacts the current ANC's version of democracy all day, every day, as per Motshekga's dream.

In Chapter 5, I have considered five major assumptions that underpin the particular way in which the DBE has represented the need for compulsory school History, and the gaps in those assumptions, which will have significant impacts should the plan go ahead. These include that School History and History teachers are tasked with an overwhelming and impossible mandate to transform public socio-political behaviour by ensuring that all learners are committed to social cohesion and nation-building, and that they all identify with an Afro-centric heritage, which will stop them turning on their compatriots from the rest of the continent, and challenging the ANC government in parliament, in the streets, in the universities, in the schools, in the press and wherever else it could happen. Secondly, the education system in South Africa is equal to the task as recommended by Minister and the HMTT. There are assumptions about broad systemic issues within DBE and the national Treasury in respect of being able to embrace the scale of the task, in respect of finance and resourcing, and flexibility of the current education system in South Africa to manage what is recommended. Thirdly, there is potential availability and capacity for the development of the teacher corps required to deliver on the recommendations. Fourthly, it is possible to adjust the curriculum to meet requirements in respect of design, time, resources, delivery and more. Finally, the policy-making process itself presumes to have been adequate, however it was highly flawed, and compromising.

In what follows, I will look at each set of assumptions and gaps in turn, and consider the effects that these are likely to produce.

### *School History's Herculean task*

It is assumed that History teachers are able, willing and should take on the responsibility suggested by the Minister and the HMTT to ensure that all learners leave school with a good understanding of

African, South African History and world history and also have learned critical thinking skills, and that these will assist them to appreciate the political dispensation within which they live. The biggest gaps and silences in this regard relate to the absurdity of the notion that teaching a particular version of History will achieve what Minister Motshekga hopes for. It is simply not possible to ensure this outcome, and in our largely dysfunctional schools, it is an even more impossible dream. The effect of this problematisation will not be lost on teachers and school heads, nor on teacher training institutions, with a number of possible outcomes. It may be seen as an opportunity for some in the teaching profession as hundreds of History teaching jobs become available. However, for History teachers the pressures to manage successful learning will be suddenly magnified multiple-fold. The expectation placed on History teachers would be unfair, unless the DBE had extensive and effective ways of providing the required support, which they do not have. The most likely effect of this expectation is that it would be a huge failure, and enormous amounts of time and money would have been wasted in the process. Further, History teachers would have to bear the brunt of concerned, even angry parents and students hostile to the idea of compulsory History. This would add unacceptable additional stress to already stressed teachers. There is a high probability that the very union that championed the idea in the first place, SADTU, would change position in response to pressures from their membership, and start mobilising against the unreasonableness of the pressure placed on teachers in all regards related to the plan. There is ample precedent to imagine the impact of this. Finally, there would likely be a drop in the numbers of people choosing teaching as a career path, let alone a vocation, with the burden of compulsory History added to their training and their practice.

*Systemic issues: Budgetary implications and prioritisation*

The lack of analysis by the HMTT into the likely financial implications of the proposal in the course of their work leaves the single biggest critical success factor unexplained. Unless this is remedied diligently, the most obvious implications of this will be that the successful implementation of the plan will be placed in fundamental jeopardy. The government is under severe pressure to address multiple service delivery deficits in all aspects, but also within education. Already there are major financial constraints compromising quality of education provision, including the fact that there are still many children excluded from the system, especially in under-resourced areas, overcrowded schools and classrooms, lack of teaching resources including logistical difficulties to distribute textbooks, inadequate or no infrastructure such as sanitation facilities and libraries, access to internet-based technologies, transport issues, nutrition issues, early Childhood Development provision, and many others. The competition for scarce resources is therefore high. The constitutional commitments made by the post 1994 government include redress in education, which was one aspect of the Apartheid

administration that exhibited some of the greatest disparities (Fataar, 2008; Mathebula, 2018; McLaren, 2017). The urgency of redress in education has been at the forefront of the democratic struggle after 1994, and there is consensus that this struggle is far from won, and that it is a cornerstone of economic freedom (Fataar, 2008; Mathebula, 2018; Spaull, 2019). If the National Treasury makes budget available for the implementation of the compulsory History proposal, this will impact on the capacity of the DBE to deliver on other education priorities, including those identified by Spaull. These include priority areas such as reversing the “8% decline in real per-pupil education” (2019, p. 3); improvements in reading and mathematics skills especially in Foundation and Intermediate Phases; improvement in teacher content knowledge; “Radical prioritization and focusing on the Foundation Phase (Grade R-3)” (p. 3); improving “university throughput”; and others. An obvious associated implication of the question about where the money come will from, and what it will be diverted from, is the danger that *if* the compulsory History plan is implemented anyway, then what are the chances for it being done well, in a context of fiscal constraints.

*Systemic issues: Flexibility of current education system*

Burdening the existing education system with compulsory History will likely disrupt the DBE and schools significantly, especially those that are already under-resourced. Suddenly, History and Mathematics would have the same status. There would need to be a cohort of new and trained subject advisors, new teachers trained to teach different content in different ways, new resources available, new assessment criteria, and more.

Teachers are already struggling under extremely difficult circumstances. The new curriculum proposals for Afro-centric content and so-called critical thinking, with the additions of citizenship education will likely overwhelm most existing teachers, who have no knowledge of nor experience of either the content or the approach. The DBE would have to convene in-service capacity development at scale. If History was, as suggested by the HMTT, made a compulsory major in teacher training courses, this would have a knock-on pressure for teacher training institutions. How would the education system (Higher education and DBE) negotiate these impacts successfully? If they failed to develop a coherent system within which to implement the proposals, what would be the impact of this on the system as a whole?

It is possible that the system may be undermined even from the start as prospective teachers seek alternative careers for fear of having to take History as a core subject, whether or not they would like to. One wonders how the DBE would manage this potential fall-out.

### *Systemic issues: Unequal quality of schools*

I have discussed in detail the vast inequalities in schools in South Africa, with the great majority suffering from serious inadequacies. The pressures on schools to manage an additional (and unpopular) compulsory subject will be high. Schools who already have chosen not to include History will be especially challenged. This will cause conflict within schools, between schools and SGBs and between schools and communities. From a resource perspective, schools will be forced to prioritise History in their daily struggle to juggle priorities in schools. How then will schools deliver on what Minister Motshekga wants, i.e. to “mould” learners to be model citizens?

A further implication is that there is a strong likelihood, based on the evidence regarding the compromised quality of education that, like the other subjects, History education in the disadvantaged areas will be of a lower standard. The fact that History is also a content heavy subject, is seen to be quite difficult and has over the years struggled to gain much support in classrooms, means that even more students are likely to fail the subject in areas where teaching practices are not optimal, or even half-way decent. If History is a compulsory academic subject, this will adversely impact on learner university entrance options by lowering points achieved, especially those from poorer areas. This will contribute to reinforcing socioeconomic inequalities, consolidating intergenerational poverty patterns.

### *Teacher development for existing and new History teachers*

Making History compulsory will require literally thousands of History teachers. It is clear that the DBE nor the HMTT have addressed this issue either quantitatively or qualitatively. The implications of this circumstance is that the DBE will struggle to get candidates in the numbers required. The low status of History, the lack of interest in the subject at schools, and the idea to make History a compulsory subject for all prospective teachers is likely to be met with anger by many planning to go into the profession. The backlash may even be that prospective teachers choose to not enter the profession at all, which would affect education delivery overall. The idea to offer state bursaries, as suggested by the HMTT, to prospective trainee History teachers, may not get even those that are genuinely interested in the subject with a concomitant danger of quality issues, and it certainly won't be able to meet the costs of the thousands of History teachers that will be required.

The need for large-scale in-service training for existing teachers will require huge resourcing, and expertise, and willingness from teachers to participate. The kind of history suggested, with its emphasis on telling the “real history” of colonialism, Apartheid and the struggle for freedom, will require that teachers, as suggested by Tibbitts and Weldon (2017) and Nussey (2018), be provided with psychosocial skills to handle the sensitivities that are likely to be provoked in the intelligent handling

of these emotionally charged and difficult topics. It is also likely that most existing History teachers will not have been exposed to the kind of Afro-centric history that the HMTT is recommending. Added to this the historical and critical thinking skills that are recommended are equally abstract, and difficult to learn and teach, if this has not been part of one's educational experience, applicable to a huge majority of existing and prospective teachers in South Africa. This means that History teachers will have to be available for input and for extensive self-teaching in their own time to be ready and capable to deliver such content. Likewise there will need to be a cohort of suitably competent teacher trainers to manage this capacity development.

If teachers do not get the varied support that they will need, they are likely to “vote with their feet” as they have been doing for decades and just not cover the topics, thus defeating the object, and rendering the whole project useless.

#### *History teacher training programmes*

Aside from teachers in classrooms, a significant onus to ensure the success of the proposal to make History compulsory for the purposes as posed by Minister Motshekga will fall on teacher training institutions. The HMTT recommends that the delivery of the project should be shared between the DBE and learning institutions. However, it is clear that learning institutions are not necessarily able to rise to the challenge, currently. It has been noted that institutions of higher learning have faced severe cuts in recent years and teacher training programmes have been particularly hard hit (Chisholm, 2018). For years before this, there have been serious concerns raised about the drop in numbers of History majors, accompanied by rationalisations in the History faculties in many South African universities. A likely implication of this situation is that it will take a lot more than time and money for institutions of higher learning to secure the necessary faculty and deliver the kind of training that will make the proposed compulsory History plan a success. Education training institutions will need to revise their curricular (both what and how they teach), staff resourcing and materials resourcing to meet the new expectations. It is unlikely that this can happen in the hopeful time that the HMTT proposes.

#### *A revised History programme – curricula, materials and resources, delivery*

Most History teachers themselves do not have the kinds of knowledge and skills envisaged by the HMTT, being themselves products of an education system (at school and at tertiary institutions) where the old cliché “History is about chaps, and Geography is about maps” applies, all described in the textbook. This implies that History teacher training should change fundamentally. In a long-term research project, Oxford University research consultant, Natasha Robinson reports on the challenges of teaching historical thinking skills,



*The findings suggest that even when students are knowledgeable about historical events, they struggle to explain how these events shape contemporary society. History education needs a more explicit focus on historical consciousness if students are to become capable of dealing with South Africa's social problems (2018, p. 1).*

Challenging the way people think about things, including what they think about education, and introducing critical thinking as a fundamental or core component, is hard to achieve, and predicates on a profoundly established cultural and socialised practice and experience. South African education is still not critical in its paradigm (Ramose, 2003). Expecting teachers to do this for themselves and their learners just by telling them to do so is at best, wishful thinking. It is also questionable whether the ANC really would welcome such a change. Would they want a population that questions and critiques and challenges? Is that not the “problem” they seek to address in the first place?

In respect of the revision of the curriculum, the development of appropriate resources and the capacity of teachers to deliver these same resources with the urgency implied by both the Minister and the HMTT, the improbability of this has been discussed in the previous chapter. The proposed date for implementation is 2022 onwards. Even if this is stretched by some years, there is a lot to do at great cost to achieve a product that addresses all named concerns, including of those championing the “decolonisation” of the curriculum, and building critical and historical thinking skills into the curriculum. The likely effect of the almost impossible, and certainly unprecedented plan, is that it probably will not succeed. How this will impact on the credibility of all role-players, especially the DBE is hard to quantify but with the recent multi-pronged criticisms levelled at the DBE, such an outcome is highly undesirable.

Even if it was possible to meet the deadlines set out by the HMTT, there is a danger that teachers (existing and new) will not be able to meet the intended outcomes of the proposal. The implication of not addressing how curriculum demands, curriculum design and content can best be aligned with pedagogy is likely to be that teachers will feel overwhelmed by the task and will default into what they know and feel confident about. It will be difficult to embrace the change, not necessarily from unwillingness, but because of lack of familiarity, lack of training and lack of confidence. This has serious implications for teacher development, and for how well teachers will be able to deliver on the task. The fact that teachers are already overwhelmed by multiple factors is relevant to their capacity to take on another significant change. This will ultimately undermine the educational experience of the learners, especially those who already face highly compromised living and learning conditions.

Even if teachers did try to deliver such sensitive material in to our South African learners, who often live in conflict-ridden and socio-economically distressed contexts, how then does the teacher deal with

the angry learner who screams injustice at the litany of past stories of brutality, exploitation, humiliation and exclusion? Who will take care of those learners and help them to make sense of what they are hearing and feeling? These issues have been raised by a number of commentators already, including Mettler (2016), Nussey (2018), and Tibbitts & Weldon (2017).

While the above factors all relate to the potential effects of the way in which the problematisation has led to a particular construction of the proposed compulsory History policy, what remains to be considered is the policy itself, including the policy-making process.

#### *The policy and the policy-making process*

Pulling out to a wider lens, even the policy making process has its effects and implications. The policy making process was flawed from the start in multiple ways. This includes the haste with which the idea was pushed to the stage of appointing the HMTT; the flawed terms of reference (including the failure to include a financial feasibility); the lack of consultation – pre-, during and post-the first and second HMTT assignments; the flaws in the final report itself which represented inconsistent effort in the different aspects as reported on in detail by commentators including Bailey (2018), Bertram (2018), Chisholm (2018), Noor Davids (2018), van Eerden and Warnich (2018) and multiple other informed stakeholders, who separately prepared a highly informed and considered and systematic portfolio of relevant critique; the lack of serious consideration of the wide scale criticism after the presentation of the HMTT report; the failure to look at alternatives; and the reappointment of the HMTT to look at implementation. There may be other weaknesses.

The haste with which Minister Motshekga responded to the pressure from SADTU to consider the idea of making History compulsory may well be the reason why the whole policy was just not sufficiently thought through. It is possible that this haste was expedient, given the power of SADTU to disrupt education in South Africa. It is an irony that the haste to initiate the project has not in any way been matched by the slow delivery of a final decision. This haste may also have been the cause of the broad and unspecific nature of the TORs for the HMTT.

The most obvious implication relating to the way in which the TORs of the HMTT were framed, is twofold. Firstly by stating that the first deliverable was for the HMTT to “conduct a research study on how best to implement the introduction of compulsory History in FET schools as part of citizenship” (para. 3), the Minister sets the HMTT up to find in favour of a predetermined outcome. Secondly, the narrow scope of the investigation meant that multiple issues were not addressed, as has been demonstrated in the identified silences of my analysis in Chapter 4. If there had been more consultation with key informants inside the sector *prior* to the drafting of the HMTT TORs, the scope of the

investigation may have been broader, and the outcome may have been a report that addressed a wider range of issues. The design of the TORs also renders the findings and report unreliable. The plethora of criticism that has been published in the press, academic journals and academic discussions after the publication of the report are an indication of the huge gaps. To make matters worse, the TORs of the reappointment of the HMTT in 2018 repeat the shortcoming. There is no indication that the dissenting and critical views published after the HMTT report in 2018 were even considered.

It may have lent some credibility to the process if the TORs had required the HMTT to also investigate alternative solutions to address the problematisation that defined the proposal. This may have included a deep analysis of Life Orientation, including how it had been formulated to develop citizenship education, and why it failed. They may even have come to the finding that a revised LO programme would be a more appropriate solution, supported by a revised History curriculum that addressed some of the gaps that the HMTT did identify. At least including an alternative may have made the HMTT findings more balanced, and they may have been able to deny that they appeared to be investigating for a predetermined outcome.

An overall effect of how the policy-making process was managed, against the way the problematisation was constructed (with the lack of pre-consultation, the lack of involvement of a broader expertise base in the HMTT, the narrow focus of the HMTT investigation, the limited acknowledgement of the broader implications of the proposal, and the insufficient stakeholder engagement) is twofold. Firstly it is counter-intuitive to democracy, in every respect. Secondly, there are likely to be major issues with buy-in from all sectors: teacher training institutions, schools and their SMTs and SGBs, teachers, parents and learners, and others engaged with the protection of democracy in South Africa. This will put the proposal in serious jeopardy should it be implemented without addressing some of the issues raised. Should the proposal *not* have public buy-in, it follows that the DBE will need to enlist a further undemocratic compliance protocol to enforce its implementation.

It seems, as indicated by the first and second HMTT appointment TORs, and despite Minister Motshekga's claim to the contrary in her address to the First History Roundtable, that the decision was taken in the early days on consideration, in 2014 already. It is hardly surprising then that the findings of the second HMTT assignment may be sliding into legislation in June 2021, with no further discussion. If there has been discussion, this has not gotten into the public domain – in our democratic country.

## Who are the defenders?

Carol Bacchi asks us to consider the issues of power and agency: “How/where has this representation of the ‘problem’ been produced, disseminated and defended? How has it been (or could it be) questioned, disrupted and replaced?” (Bletsas & Beasley, 2012, p. 21). José Álvarez Junco, in his forward to Caretero’s book *Teaching History and Memories in Global Worlds* warns us to be on the lookout for “Who speaks through the voice of texts and curriculum?” (2011, p. xvii). From the three documents analysed, it is clear that the proposal for compulsory History likely began with SADTU, who persuaded the DBE to take up the clarion call (Bertram, 2020; Noor Davids, 2018). The DBE then mobilised particular History academics to the cause. Without a more detailed research process, there is no provable evidence of collusion between the DBE and other government mandates in this regard. It is true, however, that aside from the Democratic Alliance there was no formal objection to the idea from within Parliament. It is fair to assume, therefore, that the dominant voices behind this policy proposal is the DBE (as representative of the ANC government) and SADTU, an ANC-aligned union. This point is made by multiple commentators including Bailey (2018), Noor Davids (2018) and others.

In 2003, Linda Chisholm identified these same structures, and some university-based intellectuals as the dominant voices in the policy development that resulted in the Revised National Curriculum Statements. It is interesting that the same power profile exists in the discussions about compulsory History.

It is the dominant voice that gets to problematize, that gets to define policy and enact it. How successfully this is done depends on a citizenry, and the degree to which it is or is not used to challenging the way in which they are governed. A citizenry in a practicing true democracy has mechanisms available to challenge the very way policies create problem representations, shaping what is real for the governed. History is a particularly vulnerable agent of control and of liberation, depending on what stories get told. Carretero says about school History in general:

*We could thence conclude that each society is endowed with a dominant culture which is shared, sustained and internalized by the majority of its members. School history would play its role in the cultural system by posing questions that could only be answered in a single way, limiting at once the audience and the repertoire. Moreover, what could be at stake, at the moment of hegemonizing the “kingdom,” might be the capacity to impose certain historical narratives, by reducing the polyphony of voices to a monochord sound in order to surmount the struggle for domination over reality* (2011, p. xxv).

So unlike some school subjects, History is dangerous to someone all the time. Dangerous to those who seek control over the masses if the *other* story gets told. Dangerous to the masses if the story of the heroism of the controllers is the only story. In the situation of socio-political discord that we are currently experiencing in South Africa, it is in the interests of the ANC to manage the stories that reach the ears of the citizens of South Africa. Haydn cynically notes that the kind of History we introduce depends on the kind of citizen we want,

*Is it better to have citizens who are loyal, compliant and credulous, or citizens who are discerning in their ability to handle information intelligently, and who have been educated to be constructively critical in evaluating the reliability and authority of what they are told, by politicians, the media, the internet or even historians? (2012, p. 8).*

It seems that Minister Motshekga's voice (along with her colleagues in government and SADTU) is calling for the former, no matter what. What the Minister needs to be careful about is whether the push is sensible. Will it even be possible to implement, never mind whether or not it may impact on the citizenry in the way she and her team appear to be hoping for, i.e. constructing a compliant and patriotic citizenry. And what will the cost be should the whole project fail, or worse, backfire?

### **Alignment with trends elsewhere**

Discordant as the compulsory History proposal is with the constitutional interpretation of and commitment to democracy, it is notable from the HMTT research findings and other sources, that there are other countries that have elected to make History a compulsory school subject, or are manipulating the History curriculum to tell a curated set of stories. However, it is notable that it is not only History that is being singled out for being used to serve political imperatives. There are instances emerging in various locations where a neo-liberal reaction is being expressed, seemingly to protect capitalism in a time where there is increasing resistance, very often driven by a broad coalition of popular sentiment aligned to racial injustice and climate change impacts. These resistance movements have in recent years found themselves increasingly aligned, as the connections between all forms of injustice are being interpreted as deriving from capitalist exploitation of all earth's resources from minerals to animals to plants and people. The trend therefore, is noted as being reaction by a threatened interest to protect a neo-liberal system against growing resistance and protestation, a pattern that is so familiar to historians.

While this discussion is pertinent to the broader interests of my enquiry, it is by necessity cursory, and could use much greater engagement.

In respect of the trend to make History compulsory, there is ample research to chart the trend. The HMTT investigated twelve countries - eight in Eurasia, one in Latin America and three in Africa

(HMTT report, 2018; van Eerden & Warnich, 2018). The HMTT research is evidently not comprehensive, as the analysis of their findings by van Eerden and Warnich demonstrates, finding in fact that not many countries in the selected group have made History compulsory throughout schooling. Where it *has* happened the type of History has been described as “patriotic” (p. 32). Carretero quotes Valsiner when he says that patriotism is a “special kind” of loyalty directed at “... the nonexistent object. Fatherland—or motherland” (2011, p. ix). In a number of countries a trend of incorporating patriotic citizenship or nationalism into History classrooms is emerging. This is not only in known “dictatorships” or even countries with a high level of visible authoritarian control, but also in some countries that present themselves as liberal democracies, such as the United States and the United Kingdom.

In Chapter 2, I referenced the research carried out by Mario Carretero who documented multiple locations in recent decades where school History has been specifically manipulated to serve political imperatives, including Russia, the US, Japan, Germany, several South American countries, Great Britain, India, Korea, Mexico, Estonia and Spain. Other writers like Sheldon have documented similar trends.

What is silent in the problematisation of the DBE in relation to school History, is whether they are consciously aligned to this trend of growing nationalism in school History, or whether they see it only with inward looking eyes of as something that is troubling South Africa, which South Africans (specifically the government of South Africa) must address. It is likely to be a combination of both, and other, factors. The implication of the DBE’s apparent blindness of the fact that what is happening with school History in South Africa, which is mirrored in many other countries, is that we may be contributing to a worldwide move towards neoliberal conservatism and the promotion of nationalism. This stands in contradiction to the democratic ideals as expressed in the Constitution of South Africa, which should be the guideline of policy development and practice - always.

In respect of other conservative trends expressing themselves in the education space, it is worth noting that as recently as September 2020, the UK Department for Education (DfE) issued a directive expressly prohibiting teachers from using “anti-capitalist” resources in their classrooms (Busby, 2020). The initial wording was changed after a significant public outcry (Mohdin, 2020), but the thrust clearly represented policy-making at the highest level. In December 2020 The Guardian newspaper reported on the chief inspector of the UK’s Office for Standards in Education, Children’s Services and Skills (Ofsted) pushing “back against growing calls to make the national curriculum more diverse” (Weale, 2020, para. 1). This trend in the UK mirrors the patterns of History teaching in that country discussed in Chapter 2.

In the US, after 2010, the (in)famous No Child Left Behind Act expressed a highly neo-liberal imperative dressed up as support for the poor and marginalised, by introducing nation-wide standardised testing, privatised contract and Charter schools, designed to “improve American competitiveness” (Klein, 2015, para. 3) by pressurising education outcomes to meet the needs of an economy committed to a growth mindset. It dramatically increased the federal government’s role in education. After extensive criticism of this policy, from left to right positions, in 2015 it was replaced by the Every Student Succeeds Act, which gave back to states more control, pleasing conservatives who seek less federal accountability and from education pundits who felt that education had become more about testing against prescribed outcomes rather than about teaching learners to think (Nelson, 2015). Essentially, both policies indicate the trend towards an education system tied to neo-liberal objectives.

Even in South Africa, the discourse regarding education reflects an attempt to meet the needs of a growth economy. From President Ramaphosa to Minister Motshekga, the discourse is about education for development. At the 2021 Basic Education Lekgotla, President Ramaphosa said,

*If we are to seize the opportunities of the Fourth Industrial Revolution, our education system must be reoriented towards its development in our country ... Our schools must teach the skills that will both support the growth of the economy and enable financial inclusion (Molele, 2021, para 5, 20).*

Unscrutinised, it seems obvious that education should support development. The question is, what kind of development? Whose development? And for what ultimate aim?

The trends in education generally and History teaching in particular are a site of struggle, that mirror what other contestation is taking place in the world in various ways, from the youth taking up the Extinction Rebellion fight to the Black Lives Matter to the #feesmustfall campaigns, on the one side and the pushback calling for greater control, for nationalistic determination and protection of privilege.

## **Findings and Conclusions**

The aim of this thesis is to explore how we are governed, and what we can do about this, using one policy proposal as an entry point for debate. Governance is carried out through policy. Policies are constituted based on what policy-makers wish to achieve, usually change. Policies both address issues in particular ways and legitimise those in power. Scherz (2013) tells us that, “political power is legitimised in reference to the individuals over whom it is exercised” (p. 1). Policies can be seen as the mechanism of this legitimisation. Therefore, the value of analysing policy is really to analyse how we are governed. Hobden (2021) reminds us that while governance is in the hands of elected representatives, it remains the responsibility of citizens to hold these representatives to account. This should be done

through active citizenship. As an act of holding policy actors accountable, Bacchi places all her attention on how issues or problems are represented by policy-makers, rather than on problems themselves. She tells us that problematisation is primary to the constitution of practices (2012; 2017; 2018). The study of problematisations makes an important contribution to the study of political enactment. It enables a critical exposition of what is presented as being real, and thus governable (2020). Political enactment, or governing, takes place based on what is what and how problematisation is constituted. Uncovering this problematisation is therefore critical to unmasking how we are governed, and what effects may derive from this. It also enables citizens to make choices around how they can react that are linked more closely to what determines the problematisation.

From the WPR analysis, I have come to conclude that a compulsory History policy, should it be enacted, will influence learners in a way that will create (or "mould") citizens of a certain kind: compliant rather than critical thinkers. Such citizens will identify strongly as Africans, be primed to promote social cohesion and nation-building through a programme of citizenship that is embedded the History curriculum as a solution to the problem of civil disobedience, social unrest and xenophobic attacks.

I have shown through an examination of the assumptions, presuppositions, influences and silences in the policy development that this particular problematisation is impractical, unrealistic even dangerous and even if it was possible, is unlikely to have the hoped for outcome. I suggest that the political imperative that is hidden within the policy proposal confirms what Bacchi suggests when she quotes Pienaar as saying that typically:

*... policy is driven by an imperative to construct problems as soluble, i.e. in terms amenable to technical solutions (Murray Li, 2007; see Li, T. 2007). This imperative shapes the perceived need to press forward with policy proposals and recommendations, even where much remains unknown about the character and extent of the 'problem' (2021b, para. 10).*

Motshekga referenced Winston Churchill in her History Roundtable speech in 2015 by theming the discussion under the epithet of "A country that does not know its History has no future" (para.1). She goes on to bring Edmund Burke in, quoting him as saying "Those who don't know History are destined to repeat it" (para. 4), and Karl Marx who said, "History repeats itself, first as tragedy, second as farce" (para. 11), and Milan Kundera who speaks of the importance of fighting "...the struggle of memory against forgetting" (para. 7). Finally she ends the same speech by reminding us that Sir Seretse Khama said "a nation without a past is a lost nation, and a people without a past are a people without a soul". (para. 35). There can hardly be any argument about the above sentiments, and all speak in one way or another about the importance of understanding history. However, it can also not be contested that how history is presented depends entirely on the storyteller, and which stories get told, which do not, how



the telling happens and for what purpose. This makes the way history becomes part of school curricula as the subject History of particular significance. However well a good History curriculum protects citizens against ignorance of the past, it can never protect society from those who seek power for the sake of power and not for good governance. It appears that the ANC is keen to manage the History curriculum for political purposes, even if the Minister claims that it is not pushing for “the rewriting of History for the sole purpose of achieving short-term political expediency” (2015, para. 3). That this aim is a pipe dream is almost more dangerous than what seems to be the objective.

*Can History create compliant citizens?*

I can only agree with Lee when he says that school History cannot ever, “Guarantee democrats, patriots, or even anti-racists, because the past is complex and does not sanctify any particular or personal position above another” (1998, cited in Wasserman, Maposa & Mhlongo, 2018, p. 57). In his 2011 article *History in Schools and the Problem of “The Nation”*, Haydn quotes a story told by Walker:

*There was a European country which saw its education system as book of nation building, as a vehicle for the inculcation of national virtues, the praise of national heroism, the pride in national culture. And its government was almost ruthless in its centralization of the curriculum and in deploying education as a political weapon in the republican cause. That country was France under the Third Republic and when those national virtues were put to the test in 1940, they failed miserably (p. 281).*

It is highly unlikely that in this day and age that a school curriculum of a canned History will achieve a selectively informed (or misinformed, or dis-informed) citizenry compliant to the needs of any ruling party anywhere, where the levels of control are impossible to implement. The more likely outcome is a gross and flagrant waste of resources of all kinds, and a citizenry confused about its past. Both highly incendiary outcomes for South Africa.

However, History *is* surely about identity and memory (individual and collective), it is *also* about telling the story of nations, past and present. It can provide powerful decision-support data for political management. The stories that people (citizens) know also affects how they behave in the present, so there is surely a link to citizenship. Political activists of all persuasions have used this ever since people have lived in groups. Think Julius Malema in contemporary times, or Trump, or Boris Johnson, or Hitler, or Verwoed, or Mandela, or our parents and grandparents. Or our History teachers. The story of the past and the present is political, no matter which way we look at it. Therefore it is not surprising that governments want to control the historical narrative that citizens are exposed to. If, however, the

government is – like ours is supposed to be – committed to democracy, then it is *the way in which citizens understand their past* that is almost more important than *what and how* that past is described.

*What language is the ANC government speaking?*

There is a confusion between the neo-liberal discourse of general ANC politics since its assumption to power (as expressed so clearly in education policies, and illustrated so well by the trajectory from OBE to the CAPS curriculum) on the one hand, and the ideals of democracy espoused in the Constitution on the other. The discourse of the former is about growth and development, it is about skilling the nation to support this growth trajectory, through promoting STEM subjects, preparing for 4IR, determining an education that serves the workplace. Of course, this sounds good to prospective job seekers (and their parents). But what does it really mean, in a country like South Africa, with its gross levels of socio-economic inequalities? Does it align with the basic precepts of the kind of democracy that the ANC fought for before 1994, and which is expressed in detail in the Constitution?

The discourse of the Constitution is the discourse of liberation, of equality, of human rights which includes the mandate given to the government to provide basic services – properly and effectively – to all of South Africa’s people. To achieve the ideals which *underpin the highest law of our land*, the economy needs serious reshaping. The reality is stark and harsh. Not all that much has changed since 1994. The poor are more and poorer now than ever. The “one-percenters” are still mainly white, and still own the lion’s share of the economy. Education facilities are still geared to replicating the status quo – rich kids go to excellent schools and universities; poor kids still sit on the floor, and defecate in the fields next to their shabby schools, or drown in pit latrines.

A deep practice of analysis based on continuous re-problematisation, such as is described by WPR, would assist the government to rethink its policy formulation, and bring its policy discourse into alignment. If, that is, what it wants to do.

*Concluding reflections: the process of developing a compulsory History policy for South Africa*

It is clear that the deep analysis of the plan was not carried out by the DBE prior to the assembly and appointment of the HMTT, nor of the HMTT in its work. Rather they skated on the surface of a flimsy idea that telling particular stories of History could overcome social disorder and build a sense of national pride, which would naturally lead to social cohesion and civil obedience. It is interesting that an examination of the “phases” of the History curriculum (see chapter 2) show a trend that gets closer and closer to building more nationalism (or at least a national African identity) than building critical skills implicit in education for democracy. However, it will take more than compulsory History to shut the masses up.

Bertram's 2018 analysis of the History curriculum in post-1994 South Africa provides insight into how an examination of the trend could have been more rigorously unpicked, so as to develop a more rational approach to the way in which the History curriculum and its delivery could contribute to the development of democracy in South Africa. It would assist in understanding what happens, and what needs to happen, at each point from knowledge production through recontextualisation into curricula to reproduction by teachers in their classrooms.

#### *History for democracy, or education for democracy?*

If the intention was really to use History to build democracy then there would be a leaning towards disciplinary History rather than one that is based on the national identity discourse (Bertram, 2020). And even then, that would be just one piece of the puzzle. It is not only the History curriculum that needs a makeover. It is the whole education system, from Early Childhood Development through all the phases at school to teacher training. How else will we protect ourselves and our society from narrow, destructive self-interested nationalism, or from a confused discourse and rhetoric that combines neo-liberal outcomes with populist nationalism and democracy-speak? How else will we develop an informed and critical citizenry that practices participatory citizenship for the development and protection of social, economic, environmental and political justice in a genuine democracy?

#### *Implications for democracy in South Africa*

A key imperative for me in respect of this inquiry was to consider the policy in the context of what seems to me to be an eroding of democracy in South Africa. This section then, considers the inferences I draw in this regard.

The gross implication of the original problematisation and the subsequent process decisions that were commissioned by the DBE, deflect attention away the real issues, arriving at a highly simplistic and improbable solution, namely to make school History compulsory. It is like assuming a band aid will cover a gaping wound. The resources and time expended on the work of the HMTT, coupled with the narrow focus and the lack of real analysis in their findings, and a lack of consideration of the extensive criticism of the plan before the hasty reappointment of the HMTT to continue the task, and the decision to implement some of the findings of the HMTT's first report raises questions. The questions take one back to the problematisation in the first place: what exactly does the DBE proposal seek to solve with the compulsory History policy proposal? Given what the HMTT did *not* examine in the course of their work, it seems likely that the priority was to develop a History curriculum that fostered learners to become a specific kind of citizen that is compliant and obedient, and has an Afro-centric, decolonial

and nationalistic approach to understanding the past as experienced by South Africans as a means of minimising anti-ANC protest and countering xenophobia.

The lack of consultation that took place prior to, during and after the presentation of the HMTT report goes to the heart of current ANC governance practices. Consultation is fundamental to democracy.

In Chapter 2 of this thesis, I discussed the basic tenets of democracy in general and democracy as we know it here in South Africa at this time. Democracy is a difficult practice that requires much commitment and even more due diligence to stay true to its precepts. It requires that the government (with all its policy actors) create mechanisms that facilitate consultation with the *demos*, before making decisions, especially significant decisions that will have a wide impact, and especially decisions that impinge on basic democratic tenets, such as the right to choose. It should also, as a matter of course, include lateral internal consultation across departments within government. The DBE should have consulted closely with other government mandates to ensure that any potential impact of their proposed idea was understood and considered. Even the design of the HMTT terms of reference should have been co-created with all affected parties, inside and outside of government, to ensure that expert input was factored into the exercise. The absence of a detailed financial, budgeting and funding deliverable in the HMTT terms of reference is a case in point. The lack of consultation *before* the appointment of the HMTT, about the TOR of the first appointment (and indeed, the second), the contradictory discourse of the Minister and the HMTT report, the lack of consultation between the publication of the HMTT and their reappointment all indicate clearly that the decision had effectively already been taken, even prior to the appointment of the HMTT. This is not the practice of democracy. This looks more like pushing a decision through by avoiding democratic due diligence.

Democracy lies the heart of South Africa's Constitution. It is the ideal that fuelled the long and hard liberation struggle. It represented exactly what was wrong with the Apartheid regime. In all its aspects, it was expressed in the Freedom Charter, which was carefully and reverently translated into the Constitution of South Africa.

It is true that the practice of democracy makes for difficult, complicated and drawn-out governing practices. If these are compromised in any way, then democracy is compromised. The DBE failed to consult even close to adequately about the proposed compulsory History policy. The process of investigation was not democratic. The essence of the proposal is not democratic. By wanting to make it compulsory for all South Africans to study History (and for all teachers to study History), the DBE is actively removing freedom of choice from teachers and from learners about what subjects they wish to teach and/or learn. By prescribing the content of the curriculum, the DBE is effectively doing exactly what the Nationalist Party did. They are planning to claim the authority of what story *all* South Africans

should be told. A frustrated Junco says about the school History phenomenon, that it should perhaps be dropped altogether or renamed “Patriotic Myths and Legends” (Junco as cited in Carretero, 2011, p. xviii), for there is no one story, anywhere, ever; just the stories of those with the power to determine which stories get told and which do not.

To add injury to the insult of a compromised democratic process, the discourse in Motshekga’s speech and in the HMTT Report is confusing at best, and intentionally misleading at worst. Minister Motshekga (2015) says the DBE wants learners to be “able to engage critically with the horrendous stories of colonialism, apartheid, and the liberation struggle” (para. 8) to “promote the principles of non-racialism, non-sexism and the supremacy of democracy over anarchy” (para. 15) and encourage “civic responsibility and critical thinking ... key values needed in a democratic society” (para. 12). She goes on to blatantly contradict herself: compulsory History is necessary, so that the DBE strategy can assist to build the “new person we seek to mould” (para. 10) which can “only” be done through implementing compulsory History.

Likewise the HMTT report extolls the virtues of critical thinking, education for liberation, freedom, democracy but then agrees that the policy should be compulsory and the curriculum prescribed. There is a fundamental contradiction in the discourse of citizenship and nationalism and the discourse of democracy and critical thinking.

Both the process and the product of the problem representation regarding the compulsory History proposal exposition, that citizenship, building an African identity and nation-building appear to be more important than protecting democracy. The concern in respect of undemocratically making History compulsory rather than, say, mathematics, is the relationship discussed in detail in this thesis between History storytelling and identity as well as for intentional citizenship- and nation-building, where these actions are prescribed by who is defining the terms. It is hard to avoid the impression that the kind of citizenship and nation-building that Motshekga is talking about is the one that serves the interests of the ANC, by attempting to neutralise public opposition and protest.

The implication that flows from this may explain some of the unsympathetic response that has come from the public, especially education stakeholders. It also feeds the suspicion that the purpose of the exercise is to achieve political rather than educational objectives (Bailey, 2017; Ndlovu, Malinga & Bailey, 2019; Noor Davids, 2016; Van Eerden & Warnich, 2018). Even the Minister felt it necessary to

state that the plan was not being pushed for “the *sole purpose*<sup>29</sup> of achieving short-term political expediency” (Motshekga, 2015, para. 3).

The discourse about democracy embedded in the South African Constitution continues the language of the liberation struggle. The practice of this discourse has led us into a conflicted terrain where the disjuncture between the democracy of the Constitution and the democracy of the Department of Basic Education’s proposals for compulsory History do not describe the same phenomenon. The concepts of citizen identity and nation-building that the DBE expresses in 2014-2018, speak rather to a blind nationalism and civic duty that stands in contradiction to the democracy that is described in the Constitution.

The proposed compulsory History policy proposal is one of several that have been slipped into place in recent years. It appears to me that our democracy is being steadily eroded, even as policy actors borrow from the discourse of liberation to cover their true intentions.

### **Some possible ways of doing it differently: How to respond to the WPR reveal?**

Bacchi reminds us, always, that analysing policy is a political act: it is the basis of her methodology. Using the WPR methodology enables us to reveal how problematisation has occurred, not just to know, but to do something with that knowledge. In respect of this thesis, I would propose that the actions are in the practice of vigilance, of the interrogative process in general, firstly. Secondly, it is about interrogating the problematisation around education in general, thinking clearly about what it is that people really want out of education. Thirdly, it is to drive home the notion that citizenship is *not* the sole responsibility of the DBE, and is *definitely* not the responsibility of History teachers. By all means, the DBE has a big role to play, and so too do History teachers, but the mandate is collective: it belongs to the state (our ‘elected’ government), and the citizens of the state, and the agencies that mediate between those two entities. However, importantly the mandate is not about civic duty, rather it is about building civic agency and responsibility for the wellbeing of all. In a true democracy, a strong collective collaboration between the citizens and their elected representatives to carry out governance to the benefit of the state, and the world, is an ideal worth aiming for.

A fourth action is to be a democracy activist, and actively participate in ways that hold government - at a Cabinet level, at a Parliament level, at a local level and at a civil society level - responsible to develop mechanisms of effective consultation that addresses issues of citizenship in a proactive and coordinated

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<sup>29</sup>My emphasis

manner. In a sense, it is citizenship that could be said to link citizens and the state in a relationship of collective responsibility and accountability. In the state-based world as we know it, there is no state without citizens (Hobden, 2021). There is a strong case to be built for the notion that active and participatory citizenship is critical to democracy, and is a powerful safeguard against the abuse of power by agents of the state, or agents of other vested interests. For this to happen, there needs to be a powerful change of practice and behaviour not only within the organs of governance, but also within the citizenry of a state, South Africa in our case. It is in this way that education programmes become key – both inside and outside of schools.

The first challenge is to encourage the Government, the DBE, and civil society to rethink what it is that we want our education system to serve. It is simplistic to continuously foreground growth and development of our country as the main imperative. What about, as Noddings said, “Education to promote happiness” (2003, p. 331)? What about reminding ourselves of the promises implicit in the National Education Policy Act, 1996, which draw from the Constitution and speak of a complex array of 15 principles to define the aims of a new education policy, from,

The advancement and protection of the fundamental rights of every person guaranteed in terms of Chapter 3 of the Constitution,

*[to] full personal development of each student; [to] providing opportunities for and encouraging life-long learning; [to] encouraging independent and critical thought; [to] cultivating skills, disciplines and capacities necessary for reconstruction and development; [to] ensuring broad public participation in the development of education policy and the representation of stakeholders in the governance of all aspects of the education system (SAG, 1996, p. 4-5)*

Then there could be a concerted and collaborative effort to re-problematise their thinking in respect of the compulsory History proposal, using a mechanism such as WPR, and to consider repurposing the effort that has gone into the process to date. It is clear that the History curriculum could use considerable revision. Then History teachers should be freed of the mammoth responsibility that the process has imposed upon them, but they should be encouraged (through effective support interventions) to embrace pedagogies that build critical, creative and historical thinking grounded in stories of our state and our world, of our past and our present, so that they can be informed protectors of the present democracy. Then the focus should shift to looking at how education inside and outside of schools can support democracy and citizenship, where the latter includes building a culture and practice of participatory and collective collaboration to foster local community, national and global responsibility and accountability in governance.

To achieve this end in a school education context, all points along that “value chain” need to be considered and resourced, and delivered in equal measure, across all schools, throughout the land. Importantly, such a task could not rest with any single discipline such as History, but should be distributed across the education system in various ways. It is the pedagogic approach that needs to build critical and creative thinking. A participatory, integrated and holistic approach to education could contribute to an improved experiential practice of democracy. In addition, in a world currently under the threat from a number of factors, from critical climate change impacts to increasing and uncontained levels of poverty and hunger to narrow outbreaks of nationalist populism and violence, I believe that we are at a critical juncture in human development, where it is the responsibility of education decision-makers to take a broader view of education, assisting to contribute to the development of critical and creative as well as socially aware and responsible adults, who embrace the shared responsibility of taking care of “self, other and earth”. My fundamental criticism of the DBE approach (as exemplified in the way it has problematized for compulsory History) is that it serves narrow, even distorted, ends and interests.

There are in recent years many precedents to draw from in this regard. It would have been time well spent if the HMTT had broadened the scope of their focus. An example of what could have been considered by the DBE is the United Nations Education for Sustainable Development and Global Citizenship, which has developed curricula and learning resources that our teachers could use adapt and disseminate. There are multiple sources available for this. The United Nations Educational, Scientific and Cultural Organization (UNESCO) programme emphasises an approach that acknowledges the following:

*While the world may be increasingly interconnected, human rights violations, inequality and poverty still threaten peace and sustainability. Global Citizenship Education (GCED) is UNESCO's response to these challenges. It works by empowering learners of all ages to understand that these are global, not local issues and to become active promoters of more peaceful, tolerant, inclusive, secure and sustainable societies. GCED is a strategic area of UNESCO's Education Sector programme and builds on the work of Peace and Human Rights Education. It aims to instil in learners the values, attitudes and behaviours that support responsible global citizenship: creativity, innovation, and commitment to peace, human rights and sustainable development. (UNESCO, n.d., para. 1-3)*

In regard to school History, if the DBE was really serious about using History to assist in the construction of democracy in South Africa, it would need to embrace the task in a complex multiplicity of ways that would require the most sophisticated orchestration and resourcing. The profound



differences that currently (and historically) bedevil our society are so gross that the task is ever greater than it may otherwise have been. The requirements span the production of content knowledge, the recontextualisation of that knowledge into curricula, the distribution of knowledge as well as skills to work with the knowledge via teachers (Bertram, 2020), in such a way as to generate a deep knowledge of the collective past, and skills to think meaningfully about that past in a way that contributes to the building of an informed understanding of our present, and what kind of civic responsibility (as opposed to national pride) could serve true democracy.

I argue that the greatest, safest and most effective History we can teach our children is historical thinking. This can be done without having to make it compulsory to FET with all the logistical challenges that that entails. Maybe one more year – Grade 10 to consolidate. Then put the energy into teacher training so that the History that *is* delivered is done properly and intelligently. Critical thinking (unlike historical thinking) should be the responsibility of all teachers in all subjects. It should be the founding principle of tertiary education as well, including teacher training. Historical thinking is a kind of critical thinking – thinking about the present critically, in terms of how we have arrived at this point, and what the implications are for the future.

Having made the above point, it is essential that the History curriculum receives a critical makeover, to ensure that it gives South Africans a sense of our own place in the world, acknowledges our unique stories and how they intersect with the stories of others. The suggestions made by the HMTT in this regard are highly valid, although some of the discourse is misleading, suggesting a nationalistic imperative. The narrative needs to reflect what has happened – in our neighbourhoods, in our regions, in our continent, in our world. If historical thinking is embedded in how we tell and make sense of our stories and if our learners are in the habit of thinking creatively and critically, then there is a chance that the future of our democracy, and of our earth may be well-served.

For actual citizenship education in schools, the LO location is possibly more appropriate. Citizenship (i.e. how to live well and effectively in community, how to act responsibly for one's own and each other's safety and well-being, how to contribute one's share to the collective responsibility of cohabitation and how to hold elected representatives accountable) is a life skill. It may have been much more productive in the interests of democracy if Minister Motshekga had commissioned a Life Orientation Ministerial Task Team to see how this (generally wasted) subject could *really* serve the *demos* and democracy. Like History, the LO curriculum needs an overhaul.

There is real value in critically reviewing all education from time to time, at all levels, from ECD to tertiary. Teacher education is special in that teachers carry the responsibility of educating adults for the future – this is no minor task. It is this sector that needs the most attention. If our teachers are

appropriately valued, are resourced properly, are educated fully, then we will need to worry less about single subjects at schools. If that were to come to pass, it may be that Minister Motshekga may get at least some of what she asks for in her impassioned speech to the First History Roundtable in 2015.

## Chapter 7. Concluding the research study: self-reflexivity

In this chapter I address a number of issues that relate to my positionality<sup>30</sup> as a researcher, commentator, political activist and citizen of South Africa. I take the opportunity to comment on why I selected this object of study, why the WPR approach and methodology makes sense to me and I discuss some of the challenges that frustrated me as the process unfolded, as well as some of the powerful learnings that continue to affect me. However, before I do that, I acknowledge the importance of Bacchi's seventh step of the WPR methodology.

Self-problematisation is the final step in the WPR process. It allows the researcher to go beyond just thinking about what the problematisation has revealed about the proposal, but to also examine how the researcher engages with both the subject of the enquiry and the WPR analysis itself. Bacchi (2017) recommends that the researcher apply the WPR questions to herself as an act of political ethics, as a way of revealing her own problematisation (and subjectivity) which will naturally affect the WPR analysis overall. Self-problematisation enables the researcher to do to herself what she has done to that which she is analysing (and critiquing), understanding that just as the issue under investigation is a product, so is she, and her act of thinking affects how she engages, therefore, this layer too needs to be examined. Bacchi (2021a) tells us that self problematisation is not optional, "It alerts researchers to the ways in which their views of what is real are contingent and provisional" (para. 4). In another article she reminds researchers that they need to be aware of "the extent to which their own worldviews shape their analyses" (2021b, para. 14). The limitations of the scope of a Master's thesis, prevent me from doing a full self-problematisation, which would require as much attention almost as that which I applied to my research topic. However, in the interests of acknowledging the ethics of this seventh step of the WPR process, I briefly acknowledge my own subjectivity, my own positionality.

### **"Self problematisation"<sup>31</sup>: Where do I stand?**

My proposal (in contrast to Minister Motshekga's) is essentially that disciplinary History (at school and after) should result in the development of critical thinkers, but that this can only happen under certain circumstances that actively and explicitly embrace critical and historical thinking skills into the learning process. If this is my proposal, then it follows that my problematisation is that South Africa is vulnerable to anti-democratic forces and that the citizenry are uninformed and uncritical leaving them vulnerable

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<sup>30</sup> Where this refers to the stance or positioning of the researcher in relation to the social and political context of the study—the community, the organization or the participant group.

<sup>31</sup> I use these scare quotes to indicate that this section is not technically self-problematisation as per Bacchi's WPR process, but rather references it.

to political manipulation. Embedded in this problematisation are a number of assumptions and presuppositions including that, as an erstwhile History teacher, I have strong opinions on the value of History in respect of educating people about themselves and their immediate and broader environments. Our education system in general is flawed, rendering citizens that are intellectually unable to question authority, and who are passive, dependent, non-critical and uniformed. It is in the interests of the ruling party to maintain this status quo in order to protect their power. The ANC-led government is increasingly abandoning its commitment to democracy, freedom and social justice as it clings to power. History education could assist to free citizens to an extent and contribute to the development of a true democracy if it was presented in a critical and managed in a way that fostered questioning, information gathering, informed debate, multi-perspectivity and access to resources. Participatory citizenship is a threat to the power of the ANC-led government, and thus they seek to control and redefine citizenship into a form of nationalistic and patriotic citizenship, reminiscent of the Apartheid government. Nation-building, like citizenship, is being manipulated to serve a nationalist tendency rather than a commitment to build a strong and united South Africa.

The reasons that have informed how this problem representation has come about include a trend that has emerged and which is reported on in detail in this thesis, in which the ANC government has systematically compromised the democratic ideal of the anti-Apartheid liberation struggle which the ruling party led for decades. The failure to deliver on the rights and benefits defined in the South African Constitution is one aspect of this compromise. The rampant mismanagement and corruption that has bled the state fiscus and undermined service delivery is another. The commitment to a neo-liberal capitalist growth agenda is a third.

There are silences inherent in the way that I have represented the problem, which include the way in which a broad approach to democracy education inside and outside of schools could assist in building active citizens committed to building a democracy in South Africa. Some of the same silences that undermine the DBE problem representation could be applied to my problem representation such as how it would be possible to re-formulate school History teaching in a way that is premised on critical and historical thinking.

Without having completed a full WPR analysis on the way I have represented the problem in relation to the way that the DBE has done so, this limited “self-problematisation” serves mainly to acknowledge that I entered into the WPR subjectively, with a starting positionality of my own.

## Self-reflection

In addition to the above abbreviated “self-problematisation”, what follows is a reflection on the research experience, providing further detail to my positionality in respect of the compulsory History debate, as well as the need to analyse and re-analyse policy to be clear about what influences policy development and what policy development influences, what problem representations are constructed in policy formulations and what ‘problems’ are constructed by policy. Implicit in my process is the commitment to the need for political vigilance and activism in service of the protection of sustainable democracy that is based on social, political, economic and environmental justice.

### *My interest in the significance of the compulsory History debate*

It is fair to say that the fact that I have elected to examine this proposed policy from the concern of what it means for the trajectory of democracy in a post-1994 South Africa is indicative of the way in which I have problematized the issue. I am afraid that the reason the DBE (as one mandated voice within the current government) wants to make History compulsory is because they wish to ensure that South African learners are apprised of the history of the ANC, are familiar with struggle heroes, and are cogniscent of the primacy of African history, above world history, and that the process should be directed at building patriotism amongst young South Africans. I am concerned that it is the limited narrative aspect of History that is being foregrounded above the development of critical and historical thinking. I am afraid that the rationale is more about building support for the ailing ANC-led government in a time where credibility is at an all-time low due to rampant corruption and mismanagement, than it is for building a critical citizenry aware of its past, so as to make better decisions for its future. I am concerned that the integrity of the proposal is suspect, and that it could threaten democratic ideals in multiple ways. Firstly, by providing a dogmatic and limited narrative of the past. Secondly by (maybe inadvertently) avoiding the practical implications of the decision which will undermine effective teaching of the subject. Thirdly, by removing the freedom of choice of learners to decide which subjects they can elect to pursue at FET level. I have argued that the idea is impossible to implement in any defensibly professional way, due to the lack of trained History teachers, the current status of the subject at schools, the fact that even at a tertiary level, the discipline of History has been eroded in the past few decades. This will result in the continuation of a narrative approach to History teaching, leaving historical skills (and critical thinking) left undeveloped. The urgency with which Minister Motshekga has tabled the proposal and the proposed date of implementation is improbable at best, and downright dangerous at worst. This initial urgency is contradicted by the way the process appears to have stalled.

That the DBE appeared to pivot rather suddenly from thinking that Life Orientation was the solution to a fragmented citizenry to deciding that compulsory History was the answer raises questions.

The underlying assumptions that I make about the suspect nature of the proposal are based on a reading of the governance practices of the day which have lead me to question the integrity of the justifications provided by the DBE in this matter. The proposal was not made in a vacuum, but in a political context where the ANC-led government has come under fire for a range of poor governance practices, from extreme cases of corruption, including blatant state looting and self-aggrandizement to maladministration at the expense of the democratic ideal. This erosion of commitment and practice to building a fair and democratic country has been discussed at length in this thesis.

As argued in this thesis, the policy proposal process has notable flaws, and the evidence does not support the decision to proceed with making History compulsory at FET level. Further, based on the documents (and other statements) provided by or through the DBE, as well as the debate in the public domain about this issue, I do not see a strong thrust that suggests that the primary reason for promoting compulsory History is to build democracy through ensuring that citizens are informed, and have strong historical and critical thinking skills. The need to build citizenship is a significantly louder call.

The discourse surrounding the compulsory History proposal alarmed, disappointed, saddened and angered me, as I reflected on the irony of my earlier thoughts about wishing for compulsory History in the years that I was a History teacher.

My own reflection is therefore that the DBE and HMTT proposal is cynical at best, and fascist at worst. My thesis has been constructed on presuppositions and assumptions about the anti-democratic trends that I have seen emerge, especially since the Zuma years, where governance has been corrupted by greed and self-aggrandisement, and incompetence, where the democracy project has been betrayed, where those that fought, even died, and those that dreamed of an egalitarian society that could show the way, have been fooled. There are multiple silences in my problem representation. I was tempted to carry on and on unravelling threads of this betrayal, to prove the veracity of my line of thought.

My position of cynicism is further underpinned by the gross silences that became apparent during the course of my investigation. Many have been noted in the analysis, however, one of the biggest silences of all is the way in which the matter has slipped out of any halls of discussion, formal or otherwise. There has as yet been no formal response from the DBE to the recommendations made by the HMTT in 2018, despite the fact that the proposed date for implementation was identified as 2023. Until that is, today (11 June 2021) when we are informed through the media that Minister Motshekga will be sharing information next week about “A revision of the History curriculum – including a new focus on African

and local history” (Businesstech, 2021, para. 7)<sup>32</sup>. As I suspected the decision has already been taken, perhaps in 2014 already.

The reason I chose this particular policy proposal is closely tied to my own experience and interest in the discipline of school History. For the purposes of understanding policy-making in South Africa and its relation to furthering the aims of democracy, I could have selected any number of recent policies, or practices. I could have looked at what corruption in government has meant for democracy, or even the Zondo Commission itself and its relationship to democracy. The WPR tool is agile and practically applicable to anything as a tool of exposition and clarification, and then response.

### **What were my distractions? What else should be included in this complex story?**

I never realised just how complex this inquiry would be. I found myself continuously needing to follow yet another thread to help me understand especially the contextual influences on what I was examining. This was both enriching and confusing. Perforce, I have over-simplified the discussion in multiple ways, in an effort to reign in the focus. That is life: a web of interconnected strands, where nothing is really separate from anything else. There are a number of threads that deserve additional examination.

Educational aims as a principle and a practice, and how it can serve a more new way of living in the world, including changing political and economic systems for future sustainability. How can education systems, curricula and pedagogy be used to support alternative trends and foster a world (globally and locally) where social, political and economic justice prevail (as expressed so well in the SA Constitution), in a functioning democracy.

Trends on the use and abuse of education *now*, at the point of a neo-liberal globalised economic order, and a genuine fight back from multiple actors at a local and global level, challenging the ethics and sustainability of neo-liberal capitalism.

The definition and implications of democracy at this point of our collective and local histories needs much greater examination. The impacts of neo-liberal practice on the earth and on people in different spaces and places have grossly challenged how we need to be thinking about the way we live, and the way we govern. There are multiple questions aligned to this, including:

- What is a real democracy nowadays? What should it look like in practice?
- What is the relationship between neo-liberalism and liberal democracy, as practiced?

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<sup>32</sup> This never happened, as it turned out.

- How should we conceive of power relations in a modern democracy? In the global south (or north)?
- What should we be thinking about globalisation, nowadays, and localisation?
- What is the path to a convivial society?
- How should people constitute themselves to hold administrative representatives (aka political leaders) to account?
- How can we build an education that really does empower citizens to ensure that they make and protect a democracy that serves all the people (just like it says in the Constitution)?
- How to come up with a plan that ensures that there is challenge to this compulsory History proposal going forward, and that there is a way to spot for similar policy development, to check for a clearer tendency, and to militate against this.

### **Some lasting effects of this enquiry**

The WPR approach and methodology has been highly provocative for me. It has challenged a pattern of ‘lazy’ thinking. I acknowledge a complacency, and that I have been operating in a somewhat idle ideological comfort zone, which has been rattled by this much more rigorous way of thinking. I now find I must second guess what I think about things, wondering at the way I have problematized, or others have problematized. The rigour of thinking deeper into the ontology of phenomena, hunting down presuppositions, assumptions, influences and silences before thinking through the effects is highly fruitful, and provides sometimes a whole new understanding. I have applied a quick WPR to a number of issues outside of the study recently. This has been refreshing and clarifying, if somewhat daunting.



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## **Appendix 1. Source documents**

The three source documents used in my analysis can be found at the following web links

1. Minister Motshekga's keynote speech at the 1st History Round Table Discussion held at the DBE Conference Centre, Pretoria, 03 December 2015

<https://www.education.gov.za/Newsroom/Speeches/tabid/950/ctl/Details/mid/3817/ItemID/3317/Default.aspx>

2. Government Gazette appointing HMTT with Terms of Reference, published 09 October 2015

[https://www.gov.za/sites/default/files/gcis\\_document/201510/39267gon926.pdf](https://www.gov.za/sites/default/files/gcis_document/201510/39267gon926.pdf)

3. Report of the History Ministerial Task Team, 2018

[https://www.sahistory.org.za/sites/default/files/archive\\_files/Report%20of%20the%20History%20Ministerial%20Task%20Team%20for%20the%20Department%20of%20Basic%20Education%20Final.pdf](https://www.sahistory.org.za/sites/default/files/archive_files/Report%20of%20the%20History%20Ministerial%20Task%20Team%20for%20the%20Department%20of%20Basic%20Education%20Final.pdf)

## Appendix 2. Ethical Clearance letter



Mrs Lucinda Jane Coelho (215079100)  
School Of Education  
Pietermaritzburg

Dear Mrs Lucinda Jane Coelho,

Protocol reference number: 00013194

Project title: A CRITICAL POLICY ANALYSIS OF THE PROPOSED COMPULSORY HISTORY POLICY OF 2018

### Exemption from Ethics Review

In response to your application received on 30<sup>th</sup> June 2021, your school has indicated that the protocol has been granted **EXEMPTION FROM ETHICS REVIEW**.

Any alteration/s to the exempted research protocol, e.g., Title of the Project, Location of the Study, Research Approach and Methods must be reviewed and approved through an amendment/modification prior to its implementation. The original exemption number must be cited.

For any changes that could result in potential risk, an ethics application including the proposed amendments must be submitted to the relevant UKZN Research Ethics Committee. The original exemption number must be cited.

In case you have further queries, please quote the above reference number.

#### PLEASE NOTE:

Research data should be securely stored in the discipline/department for a period of 5 years.

I take this opportunity of wishing you everything of the best with your study.

Yours sincerely,



Prof Phumlani Erasmus Myende  
Academic Leader Research  
School of Education



### **Appendix 3. Detailed WPR applied to the three source documents**

*Note: This is a set of tables in which I applied the WPR questions to the source documents as a whole and then to extracted examples of discourse used. I attempted this methodology which assisted in facilitating a close reading against the WPR questions/criteria, but I rejected the method as I found that it was inconsistent with the focus of my thesis. Had I been doing a plain discourse analysis of the three documents to see what they revealed, this methodology may have been appropriate. However, as I was aiming to reveal what the source documents revealed about policy thinking, formulation and making in respect of the proposed compulsory History policy, I found it to be more credible to take the three source documents as a whole, and see how collectively they revealed and articulated how the DBE was problematizing the issues for which their proposal was seen to be the solution.*

*In addition to the primary explanation above, to carry out such a detailed analysis of the three texts would have been an unmanageably large task in the context of a master's thesis. If I had rationalised the task by taking examples, such as the tables below demonstrate, then I would have been liable for a charge of dereliction in respect of which examples were not chosen, as which ones were. I elected to resolve this conundrum by looking at all three source documents together, and applying them to my key questions, using the WPR questions as guidelines.*

*The following tables incomplete, but are included as an appendix to indicate how I grappled with the conundrum of the analysis of three separate texts.*

#### **Applying the WPR method to the Text 1, Terms of Reference for the establishment of the History Ministerial Task Team signed off by Angie Motshekga, Minister of Basic Education in South Africa, October 2015**

Text 1 is the published gazette appointing the HMTT and specifying its Terms of Reference and outputs<sup>33</sup>. Attention is drawn to the fact that the language used in this gazette assumes that History at FET level will be made compulsory, but that how this should happen needs some investigation.

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<sup>33</sup> The full gazette is attached as Appendix 1.

**Table 1. Extract from HMTT Terms of reference**

<p><b>Example of discourse used<sup>34</sup>:</b></p> <p>I, Angelina Matsie Motshekga, Minister of Basic Education, hereby establish a Ministerial Task Team (MTT) to <i>oversee the implementation of compulsory History in the Further Education and Training (FET) schools, Grades 10 - 12.</i></p> <p>2. The Ministerial Task Team will be responsible for the following:</p> <ul style="list-style-type: none"> <li>i. <i>Conduct research on how other countries have dealt with the introduction of compulsory History as part of citizenship in their schooling system; and</i></li> <li>ii. <i>make recommendations to the Minister.</i></li> </ul> <p>3. The terms of reference of the Ministerial Task Team will be as follows:</p> <ul style="list-style-type: none"> <li>i. <i>conduct a research study on how best to implement the introduction of compulsory History in FET schools as part of citizenship located within Life Orientation;</i></li> <li>ii. <i>Strengthen the content of History in the FET band;</i></li> <li>iii. <i>Review content in the GET band;</i></li> <li>iv. <i>Proposal regarding Teacher Development in the area of initial professional education and training (IPET) and continuous professional teacher development (CPTD); arrange public hearings on the findings and compile a report; draft the implementation and management plan with clear time frames including;</i></li> <li>v. <i>compile a final report and present to the Minister and Senior Management</i></li> </ul>	
<b>WPR Question</b>	<b>Representation of problem / Problematisation</b>
<b>Question 1: What is the problem represented to be?</b>	A lack of citizenship is identified specifically in this text as being a problem that can be remedied by introducing compulsory History, with revised content, at the FET level.
<b>Question 2: What are the underlying assumptions?</b>	<p>The assumptions include:</p> <ul style="list-style-type: none"> <li>- Citizens need to be taught citizenship.</li> <li>- Other countries have done this, therefore it is reasonable that South Africa follow accordingly.</li> <li>- The content of GET and FET History curriculum needs to be amended to support citizenship building.</li> <li>- Teachers need to be brought up to speed to support the plan.</li> <li>- The public must be informed of the plan.</li> </ul>
<b>Question 3: How has this representation of the ‘problem’ come about?</b>	The context of the period around 2015 was one of extensive social upheaval in South Africa with over three anti-government protests daily between 2013 and 2104 around the country (Lancaster & Mulaudzi, 2020). The government was alert to the need to change public behaviour through changing perception of the government. Corruption and mismanagement of funds and office dominated news stories. Building citizenship was an obvious challenge, but one that might have given Motshekga and her supporters the idea that this could be achieved through a concerted programme introduced in schools.
<b>Question 4: What are the silences in this problem representation?</b>	The primary silence in this document is consultation. The whole document indicates that the decision had already been taken. The discourse is assertive and prescriptive. The HMTT is tasked to see “how best to implement the introduction of compulsory History in FET schools as part of citizenship” and to “oversee [its] implementation”.

<sup>34</sup> Italicised emphases are mine

<b>Question 5: What are the likely implications of this, especially for democracy in South Africa?</b>	The way in which the Terms of Reference are presented shows that the plan is, in the mind of Motshekga, and the ANC parliament that agreed to the gazetting of the document, a <i>fait accompli</i> . This belies any notion that an idea of such magnitude practically, politically and ethically was done with any reference or deference to democratic principles. This is a dictate. It is of no surprise whatsoever that the report presented to the Minister (which will be analysed as Text 3) faithfully (although not diligently) delivers what is specified in the Terms of Reference.
<b>Question 6: How/Where has this representation of the ‘problem’ been produced, disseminated and defended?</b>	As an official communication from the government to the citizenry of the land, the gazette is a formal, legal, mandated document. It carries the highest stamp of credibility. Therefore, we must assume that it was not the private decision of Minister Motshekga, but was discussed with at least a large cohort of officials within the DBE, portfolio committee and parliamentary gatherings. In short, this is an official determination of the government of South Africa, as presented by the Minister of DBE and NEC member, Angie Motshekga.

### **Applying the WPR method to extracts of Text 1, a speech made by Angie Motshekga, Minister of Basic Education in South Africa, December 2015**

The next document that will be analysed will be the speech made by Minister Angie Motshekga to the 1st History Round Table Discussion held at the DBE Conference Centre, Pretoria, on 03 December 2015<sup>35</sup>, two months *after* the Terms of Reference for the appointment of the HMTT was gazetted. Selected extracts of this speech will be examined using the questions of the WPR method.

In using the six questions, I aim to examine how Motshekga (as chief spokesperson for the DBE) communicates an official position. Her discourse is a mix of positions, combining the idea that the study of History is critical for the promotion of democracy, social cohesion and critical thinking on the one hand and that it fosters nationhood and civic responsibility. It is noted that this is a speech for a purpose, which is to promote the position of the need to make History compulsory. Therefore it will fall short in explanations of the “arguments” put forward. The object of applying a WPR analysis to this collection of unexplained statements is to attempt to explain what they signify, overall.

From the reading of Motshekga’s speech, there are a number of positions put forward<sup>36</sup>. The selection below illustrates the range. A selected number of extracts will be examined in detail using all or some of the WPR questions.

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<sup>35</sup> The full speech is attached to this thesis as Appendix 1.

<sup>36</sup> All italicised emphasis is mine.

- Motshekga assures the assembled audience, “... we *have not* made a determination about the status of History as a compulsory subject *as yet*. Secondly, we are investigating the possibility of strengthening the History curriculum in a bid to make it compatible with the global changes and the new discoveries about the past”.
- Motshekga notes that the exercise [of making History compulsory] is *not being done* for “the sole purpose of achieving short-term political expediency.”, or for the “benefit of the new ruling elites”.
- She claims two key reasons for the proposed idea: firstly that, quoting Burke, “*Those who don't know History are destined to repeat it.*” The second being a “*last bid attempt* at the decolonisation of the African mind”.
- She says that the History curriculum must present a “*nuanced approach*” “without airbrushing the actual story and multiple interpretations of the apartheid past - neither must we glorify the story of the liberation movements presenting them as an equivalent of moral virtue”.
- She speaks of the need for a “*shared memory* of our past”.
- She wants learners to be “able to *engage critically with the horrendous stories of colonialism, apartheid, and the liberation struggle*”.
- Having made the above statements by way of introduction, Motshekga then says “As the basic education sector, we have come to a *deliberate determination that is it the schooling system that must play a key role in the preservation and remodelling of our History*. In this regard, the teaching of History must empower young people with the ethos of the new South Africa as enshrined in our constitution thus *cementing the project of nation building, social cohesion and reconciliation*. These values must form the bedrock of a new person we seek to mould.”
- She goes on, “... *educationists believe* that the study of History serves a range of important functions such as *enriching social, and political lives*. History encourages *civic responsibility and critical thinking* – these are *key values needed in a democratic society*”.
- “It is indeed, a *universal truth* that historical perspective fosters a proper understanding of the growth of *multiple and overlapping human identities*.”
- “History as a subject asks *uncomfortable truths about what we think we know*”.
- “It is *only* through History as a subject that we can *promote the principles of non-racialism, non-sexism and the supremacy of democracy over anarchy*.”
- “... the study of History is a valuable resource for developing *critical reasoning* thus enabling original thought which will undoubtedly result in a *range of social benefits*”.
- Motshekga says, “I must emphasise that our *role as Government* should be to *implement a curriculum that is relevant not only for the market place but also for the decolonisation of the mind*”.

## WPR analysis of selected statements

The following tables take select extracts from the speech and examine this using all or some of the six WPR questions.

**Table 2. WPR analysis of extract 1 from Motshekga's speech**

<p><b>Example of discourse used:</b></p> <p>Motshekga notes that the exercise is in “no way attempting to rewrite History for the <i>benefit of the new ruling elites</i>”. Further in the same paragraph she says it is <i>not being done</i> for “the <i>sole purpose of achieving short-term political expediency</i>.”</p>	
WPR Question	Representation of problem / Problematisation
<b>Question 1: What is the problem represented to be?</b>	<p>Early in her speech, Motshekga claims that the objective is not “for the benefit of the <i>ruling elite</i>”. The choice of the word elite is curious in that it suggests that this group are “A select group that is superior in terms of ability or qualities to the rest of a group or society (Lexico, 2020), by which they cannot be defined as democratically elected representatives of the public.</p> <p>This is closely associated with the next phrase, also interestingly crafted, where she claims that the problem to be addressed is not <i>only</i> for “short-term political expediency”. She opens the way for the interpretation that it is <i>also</i> for that purpose.</p> <p>The implicit problem identified here is that there is a political problem pertaining to the immediate period that needs addressing, but that it does not concern the elite members of the ANC-led government.</p>
<b>Question 2: What are the underlying assumptions?</b>	<p>By foregrounding what the problem is <i>not</i>, and <i>not entirely</i>, Motshekga reveals how she assumes people may interpret the action (compulsory History), that there is the possibility that the action will be understood to be exactly what she says it is not. However, there is an implicit acknowledgement that there is a degree of political expediency involved.</p>
<b>Question 3: How has this representation of the ‘problem’ come about?</b>	<p>Even, during the Mbeki era, but more so in the “Zuma years” and the subsequent period, the ANC has come under consistent flak for “betraying the democratic revolution” (REFS), for adopting a neoliberal path away from the Freedom Charter and the Constitution (Devenyns, 2018), serving the interests of the corrupt elite (Gumede, 2017), and generalised and multi-level poor leadership and administration (Lancaster &amp; Mulaudzi, 2020) and a lack of accountability (Adetiba, T &amp; Asuelime, 2018). The ANC government is not firmly in control, nor does it have the support it had when Mandela to the reins after 1994. It is under pressure to build its stature and regain public confidence.</p> <p>The last two decades have been characterised by widespread protest, and it has escalated – from students about fees, access and decolonisation; from communities about service delivery, access to basic human rights such as water and housing, unemployment, corruption, land, undemocratic laws and more (South African History Online). Further social destabilisation has resulted in and from waves of xenophobic violence (Human Rights Watch, 2020). Formal parliamentary opposition politics has heated up with parties such as the Economic Freedom Fighters (EFF) challenging the state in parliament and at local polls, growing their support despite their politics of confrontation and contradiction.</p>

	The Institute for Security Studies in August 2020 reports that protests are here to stay and are largely about “poor policy implementation and a fundamental failure of political leadership” at all levels of government, a situation worsened by the Covid-19 crisis (Lancaster & Mulaudzi).
<b>Question 5: What are the likely implications of this, especially for democracy in South Africa?</b>	<p>The implicit acknowledgement by Motshekga that there is some degree of political expediency is alarming, and threatens democracy directly. The need to promote active citizenship, a narrative approach to telling the story of Apartheid, the liberation struggle and stories about national heroes at the expense of historical thinking skills delivered by ill-equipped teachers is dangerous. That this takes place at a time when the ANC itself is under threat should be a red flag to all freedom-loving South Africans.</p> <p>That she acknowledges (whether knowingly or unknowingly) that the ANC government are the “ruling elite” is also unnerving, and reminiscent of tendencies toward totalitarianism.</p>
<b>Question 6: How/Where has this representation of the ‘problem’ been produced, disseminated and defended?</b>	Minister Motshekga is Minister of Basic Education and a member of the ANC National Executive Committee. By commissioning the HMTT and expressing her opinions in parliament, to targeted stakeholders, and making media statements, Motshekga is clearly promoting this position with vigour.

*Table 3. WPR analysis of extract 2 from Motshekga's speech*

<b>Example of discourse used:</b> Motshekga says she wants learners to be “able to <i>engage critically with the horrendous stories of colonialism, apartheid, and the liberation struggle</i> ”.	
<b>WPR Question</b>	<b>Representation of problem / Problematisation</b>
<b>Question 1: What is the problem represented to be?</b>	In this extract, it is clear that the focus of Motshekga’s interest is the particular history of colonialism, apartheid and the liberation struggle. While it is likely that she would, if challenged, say that the History curriculum should be broader than that focus, she has clearly identified this as core. Implicit in this set of topics is the history of the ANC. The problem, therefore can be assumed to be that the South African population is not currently sufficiently apprised of this area of our history.
<b>Question 2: What are the underlying assumptions?</b>	The main assumption here is that currently, learners do not understand or “engage critically with the horrendous stories of colonialism, apartheid, and the liberation struggle”.
<b>Question 3: How has this representation of the ‘problem’ come about?</b>	While Motshekga does not specify, it appears that this ignorance is one of her primary reasons for wanting to enact compulsory History.

**Table 4. WPR analysis of extract 3 from Motshekga's speech**

<p><b>Example of discourse used:</b></p> <p>Motshekga says “As the basic education sector, we have come to a <i>deliberate determination that is it the schooling system that must play a key role in the preservation and remodelling of our History</i>. In this regard, the teaching of History must empower young people with the ethos of the new South Africa as enshrined in our constitution thus <i>cementing the project of nation building, social cohesion and reconciliation</i>. These values must form the bedrock of a new person <i>we seek to mould</i>.”</p>	
<b>WPR Question</b>	<b>Representation of problem / Problematisation</b>
<b>Question 1: What is the problem represented to be?</b>	This extract identifies the problem as a lack of “nation building, social cohesion and reconciliation” in the general public that could be remedied by schools who Motshekga believes have the power to “mould” citizens by giving them a remodelled version of History.
<b>Question 2: What are the underlying assumptions?</b>	<p>The underlying assumptions here include:</p> <ul style="list-style-type: none"> <li>- That the history that SA citizens know currently is insufficient to ensure that they understand the “ethos of the new South Africa”, and by extension this gap means that citizens are unable to embrace the so-called ethos without knowing a particular historical narrative.</li> <li>- That remodelling the History curriculum and ensuring that all schools deliver this to all learners will solve the problem.</li> <li>- That schools can mould learners into what is desired.</li> <li>- That schools can and should be instrumental in “nation building, social cohesion and reconciliation”.</li> </ul>
<b>Question 3: How has this representation of the ‘problem’ come about?</b>	<p>It is possible that this representation comes from precedent. The subject of History at school level has been (and continues to be) used in multiple places and periods to indoctrinate young people (future adults) into believing a particular presented narrative, whether true, selective or false.</p> <p>It is possible that Motshekga and others believe that they can control how people behave through a particular inculcation at school level.</p>
<b>Question 4: What are the silences in this problem representation?</b>	What is missing from Motshekga’s articulation is that a critical education pedagogy and curriculum in all school subjects is what would more likely achieve an engaged, informed and politically aware citizenry. That the focus is only on History renders the claims for “critical thinking in History” suspect. If Motshekga was talking about the revision of all subjects in the service of empowering learners to be able to be independent, to think for themselves, investigate, synthesize information and articulate their opinions and knowledge, then she would not focus on History alone.
<b>Question 5: What are the likely implications of this, especially for democracy in South Africa?</b>	The dangers of imposing the responsibility for “nation building, social cohesion and reconciliation” onto schools, and specifically on History teachers, are multiple. How will our schools do this “project”? Most of our schools struggle to even start the year on time, manage classrooms of 60 learners, gain access to learning materials, experience inadequate teacher numbers or inadequately educated teachers, even provide basic sanitation. How will schools who do not even offer History as a subject, or if they do, deliver it through non-History teachers, take on this massive, critical task? How will our schools, constituted as they currently are as systems of top-down “dictatorial” control, teach democracy? The task is inappropriately allocated to History teachers.

<b>Question 6: How/Where has this representation of the ‘problem’ been produced, disseminated and defended?</b>	As the “voice of government” and the “voice of education in South Africa” it is worrisome that Motshekga is firstly tasking schools and History teachers with the democracy “project” and secondly, that she believes it possible for this to happen successfully.
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**Table 5. WPR analysis of extract 4 from Motshekga's speech**

<b>Example of discourse used:</b> “It is indeed, a <i>universal truth</i> that historical perspective fosters a proper understanding of the growth of <i>multiple and overlapping human identities</i> .”	
<b>WPR Question</b>	<b>Representation of problem / Problematisation</b>
<b>Question 1: What is the problem represented to be?</b>	While it is not clear what Motshekga actually means by her phrase “multiple and overlapping human identities”, one can safely assume from the context of the overall speech that she is reiterating the need to address the problem of identity in South Africa, by acknowledging the link between identity and how historical narrative plays a part in forging the identity of individuals and groups. More importantly, what is not clear in Motshekga’s problematisation is whether she is seeking a South African identity or whether she is referencing the multiple identities of different groups in South Africa who have experienced history differently.  That she claims that it is a “universal truth” that “historical perspective” is the solution signifies her lack of understanding of the identity issue, and indeed, is an over-statement of idiotic proportions. By what decree is it a “universal truth”, one wonders?
<b>Question 2: What are the underlying assumptions?</b>	In tabling the issue of identity as a function of “historical perspective” Motshekga assumes that History teachers at a high school level will be able to resolve this complex issue for South Africans with “multiple identities” through the narrative (and skills perhaps) that they will deliver in their classrooms.
<b>Question 3: How has this representation of the ‘problem’ come about?</b>	This view is a “logical” corollary of the way that the subject of History has been loaded with extraordinary significance as a solution to the lack of social cohesion in South Africa.
<b>Question 4: What are the silences in this problem representation?</b>	The most obvious silence in this problem representation is the complexity of identity politics in general and in South Africa in particular, and the implications of placing this expectation on History teachers.
<b>Question 5: What are the likely implications of this, especially for democracy in South Africa?</b>	The implications of this facile and over-simplified view is that it has a high likelihood of failure, even impossibility of any degree of success. Not only is it unrealistic to expect History teachers to significantly address identity politics in the few hours a week they have available, even if every minute of that allocation was spent on this topic for all the years of the FET schooling calendar. It is also a highly psycho-emotional and politically sensitive topic, even without the peculiar South African complexity overlay.
<b>Question 6: How/Where has this representation of the ‘problem’ been produced, disseminated and defended?</b>	To have a senior member of government, and one who is responsible for arguably one of the most critical mandates of governance minimising the complexity and seriousness of the problems associated with identity politics is at best alarming and at worst hopelessly irresponsible.



**Table 6. WPR analysis of extract 5 from Motshekga's speech**

<b>Example of discourse used:</b> <i>“It is <b>only</b> through History as a subject that we can <b>promote the principles of non-racialism, non-sexism and the supremacy of democracy over anarchy.</b>”</i>	
WPR Question	Representation of problem / Problematisation
<b>Question 1: What is the problem represented to be?</b>	Motshekga's assertion regarding the power of History in schools illustrates that she sees as part of the problem the fact that we run the danger of living in an anarchy characterised by racialism, sexism and anti-democratic principles. She assumes that it is <b>only</b> through ignorance about the past that people are racist, sexist and politically conservative.
<b>Question 2: What are the underlying assumptions?</b>	Again, the assumption appears to be that <b>only</b> History teachers can fix centuries of anti-democratic behaviours, through telling a different story of the past.
<b>Question 3: How has this representation of the ‘problem’ come about?</b>	This representation of the problem is simplistic. It can only have come about by virtue of a superficial understanding of the circumstance we face in South Africa. It must also be premised on a lack of planning, consultation and realistic analysis.
<b>Question 4: What are the silences in this problem representation?</b>	Are History teachers to solve the problem alone? What if they can't, or don't? What if telling a different story makes no difference, then what?
<b>Question 5: What are the likely implications of this, especially for democracy in South Africa?</b>	The “democracy project” will fail if it is left to History teachers alone to foster behaviour change. The problem is misrepresented and therefore the solution cannot succeed.
<b>Question 6: How/Where has this representation of the ‘problem’ been produced, disseminated and defended?</b>	The problem has been misrepresented in the highest halls of government.
<b>Example of discourse used:</b> <i>I must emphasise that our <b>role as Government should be to implement a curriculum that is relevant not only for the market place but also for the decolonisation of the mind.</b></i>	
WPR Question	Representation of problem / Problematisation
<b>Question 1: What is the problem represented to be?</b>	Implicit in this statement is the problematisation that currently, education in South Africa may be falling short of delivering an education that serves the “market place” as well as actively leading to the “decolonisation of the mind”.
<b>Question 2: What are the underlying assumptions?</b>	<p>Underlying this formulation are three main assumptions:</p> <ul style="list-style-type: none"> <li>- The government is responsible for determining what education should be provided to learners of a country.</li> <li>- That education should serve “the market place”.</li> <li>- That education should contribute to the “decolonisation of the mind”.</li> </ul> <p>These assumptions are not exactly coherent ideologically, but are representative of a neoliberal trend, with a decolonisation interpretation attached. They do not express the kind of education aligned to promoting and maintaining democracy through critical thinking, freedom of choice, or freedom of thought. They are more closely aligned to a controlled education system that determines what and for whom curricula should be designed and delivered. The decolonisation component is aligned to the nation-building and citizenship narrative. It is not clear whether Motshekga understands exactly what she (or others) mean by the term decolonisation.</p>

<b>Question 3: How has this representation of the ‘problem’ come about?</b>	It appears that Motshekga is casually bringing together to unexamined “buzzwords” to sound as if the concept she is proposing is relevant and legitimate.
<b>Question 4: What are the silences in this problem representation?</b>	There is no explanation implicit in her rather loaded statement that explains what she means by the three main assumptions that make up the statement. This loud silence allows a casual statement to sound grand and impressive.
<b>Question 5: What are the likely implications of this, especially for democracy in South Africa?</b>	Democracy in South Africa (as discussed in chapter 2 of this inquiry) has a particular nuance, but like all definitions of democracy, have at heart the protection of individuals within community in ways that promote equitable social, political, economic and environmental rights, including freedom of thought, of expression, of association, access to quality services, including education, housing, medical care, justice, opportunities and others. A democratic government should ensure that they carry out their governance and service delivery mandate in a way that protects one and all. Designing systems of education that serve the market rather than the people begins to redirect the mandate away from how our Constitution is formulated.

### WPR analysis of overall speech

The minister’s speech is made up of a large number of not always clear statements that are not always tightly aligned. She has patched together quotes and statements that are not explained but put together a loose argument for the introduction of compulsory History. Best Minister Motshekga be mindful of her discourse, so that she does not mix her metaphors and trip over her contradictions.

**Table 7. WPR analysis of Motshekga’s speech**

<b>Example of discourse used:</b> The speech as a whole is analysed.	
<b>WPR Question</b>	<b>Representation of problem / Problematisation</b>
<b>Question 1: What is the problem represented to be?</b>	Motshekga has represented the problem to be one of ignorance about the past that has resulted in a country riven by “racism, sexism” and possible “anarchy”. The solution she is pushing for is making History compulsory at FET level.
<b>Question 2: What are the underlying assumptions?</b>	<p>The assumptions include the following:</p> <ul style="list-style-type: none"> <li>- That the history that SA citizens know currently is insufficient to ensure that they understand the “ethos of the new South Africa”, which has resulted in multiple challenges to the country.</li> <li>- That remodelling the History curriculum and ensuring that all schools deliver this to all learners is the only solution to the problem.</li> <li>- That schools can mould learners into what is desired.</li> <li>- That schools can and should be instrumental in “nation building, social cohesion and reconciliation”.</li> <li>- That History teachers are able to rescue the “democracy project” single handed, with a bit more training.</li> <li>- That there is nothing wrong in other aspects of governance.</li> <li>- That South Africans are ignorant to the degree that if they all knew a bit more history then they would behave with a strong sense of citizenship.</li> </ul>

<p><b>Question 3: How has this representation of the ‘problem’ come about?</b></p>	<p>It is possible that this representation comes from precedent. The subject of History at school level has been (and continues to be) used in multiple places and periods to indoctrinate young people (future adults) into believing a particular presented narrative, whether true, selective or false.</p> <p>It is possible that Motshekga and others believe that they can control how people behave through a particular inculcation at school level.</p> <p>It is also possible that it comes from sheer ignorance and lack of consideration about the complexity of the issues we face in South Africa.</p>
<p><b>Question 4: What are the silences in this problem representation?</b></p>	<p>There are multiple silences:</p> <ul style="list-style-type: none"> <li>- What about the massive budgetary and logistical challenges involved in such an impactful decision? These include the fact that History as a subject at secondary and tertiary level has been side-lined for decades, dropping in popularity to the point of not even being offered in some schools and tertiary institutions. There is a major shortage of trained History teachers? There are massive deficits in respect of teaching resources at schools, especially for the delivery of a critical History curriculum.</li> <li>- What about the lack of effective governance in multiple areas that are the primary cause for socio-political discontent?</li> <li>- What about the dangers of using History to promote identity politics, national pride and citizenship? What about the lessons learned from Apartheid South Africa, from Nazi Germany, from other countries where History has been used and abused?</li> <li>- What about that a critical education pedagogy and curriculum in all school subjects is what would more likely achieve an engaged, informed and politically aware citizenry?</li> <li>- What about the democratic right of learners to choose what subjects they wish to study at school level?</li> <li>- What about the limitations that making History compulsory will impose on academic time for learners to gain other skills and knowledge sets, especially in the context of the unlikelihood of gearing up for delivering a comprehensive History curriculum at every school in the country?</li> <li>- What about the process of investigation as proposed by Motshekga that did not include a single History teacher, school principal, parent, learner in the HMTT?</li> <li>- What about the fact that although Motshekga says no decision has been made, she specifies in her speech that the HMTT has been appointed “to properly advise us on how best we can move towards the implementation of compulsory History in the FET band”.</li> <li>- What about how this idea to make History compulsory came about in the first place, replacing Life Orientation, specifically the citizenship component of the latter subject?</li> <li>- Who else has been part of bringing the Minister to this didactic position?</li> </ul>
<p><b>Question 5: What are the likely implications of this, especially for democracy in South Africa?</b></p>	<p>The plan is a dangerous plan on two main counts:</p> <ol style="list-style-type: none"> <li>1. If the plan fails to achieve what Motshekga wants it to do (and it likely will for multiple reasons), what will the fallout be – in terms of wasted time and budget, loss of teaching and learning time, loss of credibility?</li> <li>2. What if it becomes a dangerous site of ANC indoctrination? What will this do for democracy in South Africa? There is a real danger that History may be used to tell a single story, in the context of an education</li> </ol>

	system that is not by nature or design critical, but which is premised on a pedagogy that is based on a top-down, teacher-centred, non-participatory approach; and which faces fundamental capacity and resource deficits. Whether or not Minister Motshekga admits to wanting to use History for political expediency, the limitations on the practicality of using History to teach critical thinking dictates a likely trajectory of the plan: that it will not be a liberatory exercise.
<b>Question 6: How/Where has this representation of the ‘problem’ been produced, disseminated and defended?</b>	With reference to Motshekga’s speech to the 1 <sup>st</sup> History Roundtable, it is clear that she – as Minister of Basic Education and as NEC member – is lending her power, stature and position to the way the issues have been problematized, and what solution is put forward. She refers to the fact that she has raised the matter in parliament previous to this event. What she does not refer to is that the same issue has been brought to her by SADTU, a powerful, ANC-aligned teacher union.

In Text 1, we note that Minister Motshekga signs off on the Terms of Reference for the HMTT, according to which document, the primary task is to determine the best way in which compulsory History can be implemented. In Text 2, Motshekga claims that the decision had not been taken (despite the wording of the aforementioned gazette), but that there were multiple good reasons for the action to happen. Text 3 presents the executive summary of the report presented by the HMTT.

### **Applying the WPR method to the Recommendations made by the History Ministerial Task Team, as summarised in the published Executive Summary**

Text 3 is the summary report of the HMTT<sup>37</sup>. Even the summary is too long to analyse fully using the WPR questions, so select extracts will be used. The following is a set of key extracts taken from the summary. For the purposes of the WPR analysis, selected extracts will be used.

It is noted that the executive summary from which the below is extracted, does not address all aspects discussed in the full report, but as an official, sanctioned summary, it is assumed that it addresses what the HMTT took as the key factors.

In respect of the comparative investigation:

- “... compulsory History” at the Upper Secondary level is not a question unique to the South African context.”

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<sup>37</sup> The HMTT Executive Summary is attached as Appendix 3.

- “There is no single approach to compulsory History and the content of History curricula is generally related to the specific contextual national, educational and civic priorities of a given country”.
- “The broad lesson is that if History is made compulsory in South Africa, all the various contextual factors and concerns or challenges specific to South Africa would have to be carefully considered, for example: capacity, teacher development/training, content, budgetary implications, and planning.”
- “... a phased approach ... will allow for better planning and teachers to be developed/trained to begin the process of implementing compulsory History from Grades 10 to 12.”

In respect of reviewing the Curriculum and Policy Statement (CAPS)

- “History is not solely about the past, [but] is about how we think about the past in the present ... the study of political History [should] be balanced with an infusion of content from other branches of the discipline, namely social History; political economy; labour History, gender History and economic History”.
- “... aims and objectives of History education at schools should be to enhance everyday life skills such as vocabulary, reference techniques, comprehension, translation, communication, extrapolation, and judgment. As educators/ teachers, our main aim is to teach learners, through their life experiences, how to use intellectual and social skills to become more effective learners and responsible citizens”.
- “While CAPS achieved the primary goal of lightening the administrative and content load of the curriculum, there was a marked depletion and fragmentation of credible content, concepts and methods which are foundational to African History.”
- “It was noted by the MTT that CAPS tackles the study of ‘pre-colonial’ Africa superficially in the early phases of schooling. This means that more than 100 000 years of human biological, social and cultural History that unfolded on the African continent are marginal to the curriculum and is dealt with in the lower grades, resulting in a curriculum that fails to treat Africa adequately as a continent with a rich past. In part, this marginalisation of Africa in CAPS has to do with the excision of archaeology from the curriculum as well as the absence of key concepts in African oral tradition”
- “What is discernible about CAPS curricula is that the teaching of archaeology in a systematic way is not emphasised, particularly the links between the Cradle of Humankind site and corresponding sites in East Africa, namely, Kenya and Ethiopia.”
- “the MTT feel it is crucial that Archaeology be included in the curriculum as a way of deepening the understanding of African History”.
- “... it will be possible for them to become policy analysts enrolled in Development Studies at university; a bright future also beckons for these learners to follow careers as economic historians, sociologists, social anthropologists, economists, archaeologists, diplomats and political scientists. Furthermore, History learners have a future in the fields of arts, culture and heritage and thus we need to provide a solid base for them at school. This has to be done to highlight both the intrinsic and extrinsic value of History”.
- “The report also argues that the CAPS content approach is specifically biased towards the Liberal School of thought as a dominant historiographical paradigm in South Africa; yet there

are other schools of thought such as the Afrikaner Nationalist, African Nationalist, Black Consciousness and Marxist/Social History schools of thoughts”.

- “The African Nationalist and Black Consciousness paradigms have been discriminated against and neglected in terms of South African historiography”.

In respect of reviewing Teacher Development issues:

- “History teachers/educators need to be trained professionals. They should be trained in History, archaeology and possibly even African literature and an African language so they have a comprehensive background in African History”.
- “The lack of qualified History teachers poses a serious challenge and naturally, most of the unqualified Teachers / educators adopt a negative attitude towards teaching History, ignorant of the fact that History offers life-long learning skills such as writing, comprehension, interpretation, synthesis, problem-solving and analytical skills”.

Summary: Key Recommendations

- “Introduce History as a compulsory subject in the FET (Grades 10 – 12) Phase”.
- At FET Phase, compulsory History to replace Life Orientation as one of the Fundamental subjects.
- At the GET phase, Life Orientation to be maintained as a compulsory subject and the content should be strengthened.
- Life Orientation should be phased-out incrementally from the FET curriculum from 2023 (Grade 10) to 2025 (Grade 12).
- The notional time in Grades 10-12 should be increased from 27.5 hours to 29.5 hours per week.
- Compulsory History to be phased in incrementally from 2023 (Grade 10) to 2025 (Grade 12).
- CAPS curriculum has serious limitations and a complete overhaul of CAPS is required. Africa centeredness should become a principle in revising the History content.
- The 6-7 years towards the phasing-out of Life Orientation in the FET band be used to prepare the system for compulsory History in the FET band.
- The notional time of 4 hours per week for teaching History in the FET band must be maintained.
- History Teacher Development should be strengthened by institutionalising the DBE’s Continued Professional Teacher Development (CPTD) programmes.
- Two final year examination papers at Grade 12 with Paper 1 focussing on African History and Paper 2 focussing on History of the wider world including Europe or vice-versa”.

The following extracts refer to HMTT findings regarding historical skills and thinking.

**Table 8. Extract 1 of HMTT**

<p><b>Example of discourse used:</b></p> <p>“History is not solely about the past, [but] is about how we think about the past in the present ... the study of political History [should] be balanced with an infusion of content from other branches of the discipline, namely social History; political economy; labour History, gender History and economic History”.</p> <p>The “... aims and objectives of History education at schools should be to enhance everyday life skills such as vocabulary, reference techniques, comprehension, translation, communication, extrapolation, and judgment. As educators/ teachers, our main aim is to teach learners, through their life experiences, how to use intellectual and social skills to become more effective learners and responsible citizens”.</p>	
<b>WPR Question</b>	<b>Representation of problem / Problematisation</b>
<b>Question 1: What is the problem represented to be?</b>	The problem identified by these extracts is the finding that the CAPS curriculum does not address historical thinking, or skills nor does it include the variety of focus areas that would balance the integrated understanding of a topic
<b>Question 2: What are the underlying assumptions?</b>	The underlying assumption is that the current curriculum is limited to an inordinate focus on political history (often linked to facts, leaders and dates) to the exclusion of other more aspects of history adding to a more complex understanding. Historical skills are also assumed to be lacking, and are named in the recommended solution.
<b>Question 3: How has this representation of the ‘problem’ come about?</b>	The teaching of History according to the CAPS guideline has in fact promoted the integration of historical skills into the interpretation of historical narrative (DBE, 2011). The challenge has come with how these guidelines are implemented in History classrooms, where multiple limitations undermine the diligence with which the subject is taught from a curriculum that is too packed to limited time allocations to lack of resource materials to underqualified teachers.
<b>Question 4: What are the silences in this problem representation?</b>	The main silence in this problem representation is that the problem is a product of the way education is delivered in South Africa overall. The conditions faced by teachers in under-resourced schools coupled with a teacher-centred and non-critical pedagogy is bound to be short on historical skills development.
<b>Question 5: What are the likely implications of this, especially for democracy in South Africa?</b>	The implications of this simplistic problematisation is that it will contribute to the likely failure of the proposed solution. Making History compulsory will not improve what happens inside History classrooms, but is more likely to compromise it further, as the conditions will not be remedied within five or even ten years. This will not contribute in any positive way to democracy in South Africa.
<b>Question 6: How/Where has this representation of the ‘problem’ been produced, disseminated and defended?</b>	The HMTT has the mandate from the DBE, and is likely therefore to be given credence beyond the actual quality of their investigation and subsequent report in the halls of power, where long term decisions will be made about the future of History education in South Africa.

The following extracts refer to HMTT findings regarding content of the curriculum. This was restricted by the HMTT to the need to increase African representation in the CAPS curriculum.

**Table 9. Extract 2 of HMTT Summary**

<p><b>Example of discourse used:</b></p> <p>“It was noted by the MTT that CAPS tackles the study of ‘pre-colonial’ Africa superficially in the early phases of schooling. This means that more than 100 000 years of human biological, social and cultural History that unfolded on the African continent are marginal to the curriculum and is dealt with in the lower grades, resulting in a curriculum that fails to treat Africa adequately as a continent with a rich past. In part, this marginalisation of Africa in CAPS has to do with the excision of archaeology from the curriculum as well as the absence of key concepts in African oral tradition”</p> <p>“The report also argues that the CAPS content approach is specifically biased towards the Liberal School of thought as a dominant historiographical paradigm in South Africa; yet there are other schools of thought such as the Afrikaner Nationalist, African Nationalist, Black Consciousness and Marxist/Social History schools of thoughts”.</p> <p>“The African Nationalist and Black Consciousness paradigms have been discriminated against and neglected in terms of South African historiography”.</p> <p>“While CAPS achieved the primary goal of lightening the administrative and content load of the curriculum, there was a marked depletion and fragmentation of credible content, concepts and methods which are foundational to African History.”</p>	
<b>WPR Question</b>	<b>Representation of problem / Problematisation</b>
<b>Question 1: What is the problem represented to be?</b>	The findings of the HMTT are that the CAPS curriculum is poorly lacking in African content, to the point that African history has been “marginalised” and “discriminated against”.
<b>Question 2: What are the underlying assumptions?</b>	<p>This problematisation is based on the finding that there is limited consideration of pre-colonial Africa in the CAPS curricular for all phases, other than short inserts in Grades, 5, 6, 7 and 10 (DBE, 2011). This is ascribed to the exclusion of archaeology and oral tradition as historical evidence from the curriculum.</p> <p>A further assumption is that an introduction of pre-colonial history into the syllabus would balance the books, and build a strong sense of history and cultural identity of Africanism in our learners.</p>
<b>Question 3: How has this representation of the ‘problem’ come about?</b>	Thinking that this representation is the core issue to be solved by increasing African content and archaeology into the curriculum comes from a simplistic approach to education, to learning, to History. This problem representation comes from a superficial analysis of the core issues that are destabilising historical understanding, and a facile notion of how these deep complex issues can be resolved. There is an implicit commitment to Africanisation of the curriculum for narrow nation-building, or at least continent-building.
<b>Question 4: What are the silences in this problem representation?</b>	Again, the silence is that which pertains to the inadequacies of the wider system of education, and to the lack of political will to truly educate learners so that they can be critical and questioning, both of the past and the present and the future.
<b>Question 5: What are the likely implications of this, especially for democracy in South Africa?</b>	Building a culture and practice of Africanisation in respect of the History curriculum will not build critical historical skills, and will not build critical adults engaged in promoting democracy in South Africa. It may at best build a cohort of adults who know more about Africa and less about the world. The agenda for promoting increased African content is narrow.



This last extract to be examined attempts to provide insight into how the whole Executive Summary has problematized the issues for which compulsory History is seen to be the answer. The HMTT has taken its instruction from the Minister, and delivered against the Terms of Reference that accorded their appointment. They have basically given the Minister the answer she was looking for: Despite the challenges, History should be made compulsory at FET level in order to equip South African learners with the knowledge and skills necessary to be active citizens, with a strong sense of their collective African identity. The curriculum should be overhauled and many more History teachers should be trained through an attractive bursary scheme offered by the government. What does this reveal if we ask Bacchi's questions of it?

**Table 10. Overall analysis of HMTT Summary**

<b>Example of discourse used: Overall HMTT Executive Summary</b>	
<b>WPR Question</b>	<b>Representation of problem / Problematisation</b>
<b>Question 1: What is the problem represented to be?</b>	The problem is identified as being a nation of adults who do not identify sufficiently as Africans, because they are unaware of the long and rich history of the African continent.
<b>Question 2: What are the underlying assumptions?</b>	The underlying assumption of this problematisation is that if only people knew more about and appreciated their pre-colonial past, they would be less likely to have a fragmented and "colonised" mind. They would appreciate that all Africans shared a past that binds them together in pan-African bond of allegiance, a pride in their shared past.
<b>Question 3: How has this representation of the 'problem' come about?</b>	The focus that the HMTT has placed on Africanising the History curriculum likely based on the way in which the task was presented to them in the Terms of Reference, has resulted in this representation, making sure that the scope of their inquiry was restricted to seeing what precedents were evident in other countries, how the pre-determined solution could be implemented and what the implementation timeline should be. If the Terms of Reference had required the inquiry to assess whether making History compulsory would build a more critical public, able to participate in building democracy, the findings may have been quite different.
<b>Question 4: What are the silences in this problem representation?</b>	The loud silence is any honest depiction of what exactly the reasons are for generalised discontent amongst the communities of South Africa, and why these are being directed at unexpected targets (such as resident Africans immigrants). The silence is an honest admission that the government is afraid that it is losing support.
<b>Question 5: What are the likely implications of this, especially for democracy in South Africa?</b>	
<b>Question 6: How/Where has this representation of the 'problem' been produced, disseminated and defended?</b>	