

Decolonising Education in the Global South:

Historical and comparative international perspectives

**Edited by Johannes Seroto,
M Noor Davids and Charl C Wolhuter**

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Contents

About the authors	vii
Acknowledgments	xi
Introduction	xiv

Chapter 1	The rise of the Global South in the Global Education Project: Achievements and challenges	1
	<i>Charl C Wolhuter</i>	
	Introduction	2
	The causes of the global education expansion drive	2
	The historical trajectory of the global education expansion drive	5
	The proportions of the global education expansion project	8
	Challenges for education in the Global South	13
	Conclusion	16
	References	17
 Chapter 2	 The scholarly field of History of Education and its scope in the Global South	 21
	<i>Charl C Wolhuter and Johannes Seroto</i>	
	Introduction	22
	History of Education: Conceptual clarification	22
	The significance of History of Education	23
	History of Education: Institutional presence at universities	24
	Paradigms in education historiography	26
	Themes of research	28
	Geographical focus of research and of authorship	29
	The need to recentre History of Education in the Global South	31
	History of Education research paradigms in the Global South	32
	Conclusion	35
	References	36
 Chapter 3	 Indigenous history and education before colonial times	 40
	<i>Johannes Seroto</i>	
	Introduction	41
	Historical phases and their influence on education for indigenous people	41
	Human settlement in South Africa before the colonial period	44
	Intergroup relations between indigenous peoples	47
	Spirituality as a means of education	48
	Education through practice	49
	Learning through language socialisation	50
	Education through rock art	52
	Learning through initiation ceremonies	53
	Education through virtues of <i>ubuntu</i>	55
	Conclusion	55
	References	56

Chapter 4	Christian missionary education in South Africa	59
	<i>Johannes Seroto</i>	
	Introduction	60
	The Dutch Colonial Period (1652–1795)	61
	The British Colonial Period (1795–1803; 1806–1910)	62
	South African Christian movements in the 20th century	65
	Impact of mission encounters on politics, economics, cultural practices and education	68
	The role of African missionaries and women in missionary work	71
	What are the long-term impacts of missionary encounters on decolonisation?	72
	Conclusion	73
	References	74
Chapter 5	From home-based Islam schools to independent Muslim schools: A history of Muslim education in South Africa (1652–1990s)	77
	<i>M Noor Davids</i>	
	Introduction	78
	Three waves of Muslim immigration: Early arrivals until post-1994 additions	79
	Muslim educational history: Historiographic observations	80
	Early Muslim education (1652–1890s)	82
	Conclusion	90
	References	91
Chapter 6	Apartheid education in South Africa: Racialisation and institutionalisation of education (1948–1994)	93
	<i>Johannes Seroto</i>	
	Introduction	94
	Origins of the National Party (NP)	95
	Apartheid schooling in South Africa	98
	History of Bantu education	105
	Resistance to Bantu education: 1976 learners uprising	112
	Conclusion	117
	References	118
Chapter 7	Case studies in African decolonial education: Timbuktu and Great Zimbabwe – Ujamaa (Tanzania) and Harambee (Kenya) schools	122
	<i>M Noor Davids</i>	
	Introduction	123
	Colonialism, coloniality and post-colonial Africa: A conceptual framework	124
	Timbuktu	126
	Great Zimbabwe	130
	Decolonising African schooling: Education for self-reliance – Tanzania	132
	Kenya's Harambee schools – 'let us pull together'	134
	Conclusion	136
	References	137

Chapter 8	The scholarly field of comparative and international education and its promise in the Global South	139
	<i>Charl C Wollhuter</i>	
	Introduction	140
	Historical evolution of the field of comparative and international education	140
	Comparative education: Present state	144
	Comparative education: Future scenario	145
	What is comparative education?	146
	The purposes or significance of comparative education	147
	Prospects of comparative and international education in the Global South	150
	Conclusion	153
	References	153
Chapter 9	Education in India	156
	<i>V Santhakumar</i>	
	Introduction	157
	Contextual background	158
	Beginnings and development of formal education	164
	Aims and objectives of education	165
	Education ladder	166
	Curricula	167
	Ways of teaching and learning	169
	Assessment	168
	Enrolments	169
	Challenges/Conclusion	171
	References	172
Chapter 10	Rethinking the decolonisation of education in Tanzania	174
	<i>William AL Anangisye</i>	
	Introduction	175
	Contextual background	176
	Education system	182
	Conclusion	189
	References	189
Chapter 11	Education in Turkey: Developments and challenges in access, quality and equity	193
	<i>Sedat Gümüş and Enes Gök</i>	
	Introduction	194
	Contextual background	194
	Education system	199
	Challenges/Conclusion	205
	References	206

Chapter 12	Education in Chile: On the path to inclusion?	210
	<i>Noel McGinn and Óscar Espinoza</i>	
	Introduction	211
	Contextual background	212
	Education in Chile	219
	Conclusion	228
	References	230
Chapter 13	Education in the Islamic Republic of Iran: From the ancient to the modern	233
	<i>Azimah Takrimi and M Noor Davids</i>	
	Introduction	234
	Background: Geographical, historical and social context	235
	A brief educational history of Iran	237
	Contemporary challenges	245
	Conclusion	246
	References	247
Chapter 14	A quest for a decolonised curriculum and the role of language of teaching as a decolonising tool	249
	<i>Khazamula Maluleka and Mahlapahlapana Themane</i>	
	Introduction	250
	Conceptions of curriculum	250
	A decolonised curriculum	251
	Language and colonisation	255
	Linguistic realities in South Africa	259
	Conclusion	262
	References	262
Chapter 15	A higher education case study in the Global South: South Africa past and present	265
	<i>Loyiso M Luvalo</i>	
	Introduction	266
	Concept of higher education	266
	Internationalisation of higher education in the South African context	275
	Current views on decolonisation of South African higher education	276
	Conclusion	278
	References	279
Chapter 16	Guidelines for a research project	282
	<i>Charl C Wolhuter and Johannes Seroto</i>	
	Introduction	283
	Steps in the research process	283
	Conclusion	301
	References	302
Index		305

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Introduction

Decolonising Education in the Global South: Historical and Comparative International Perspectives reflects on decolonisation of education in the Global South (Africa, Latin America, and the developing countries in Asia) from a historical and comparative perspective. Countries in the Global South are often characterised as poor, less developed and face social, political and economic challenges. The term ‘Global South’ refers to ‘an entire history of colonialism, neo-imperialism, and differential economic and social change through which large inequalities in living standards, life expectancy, and access to resources are maintained’ (Dados & Connell, 2012:13).

The title *Decolonising Education in the Global South: Historical and Comparative International Perspectives* has been selected because for a long time, the voices of the Global North (powerful empires such as Europe and America) dominated those of the Global South. African history, for example, from pre-colonial period to date was dominated by European liberal tradition. Education for Africans was approached from an ethnocentric and Eurocentric point of view.

The Global South had a tendency of theorising about indigenous people from a ‘Western perspective, using Western ideas, culture, politics, historical experiences’ (Sihlongonyane 2015:61). Ndlovu-Gatsheni (2013) argues that there is a continuing need to push forward the struggle for decolonisation while putting pressure on the Global North to disengage from imperialism and Eurocentrism. Maldonado-Torres (2007) and Grosfoguel (2007) posit that there is a need for more critical ways of understanding colonisation and decolonisation that open ways for engaging in an informed analysis of Eurocentrism and colonialism. This book attempts to shed light on how coloniality, which Samir Amin (2009) refers to as the twin of Eurocentrism, played itself out in the Global South and how the Global South can begin engaging with the decolonisation project, especially in the education sector.

At South African universities, where the editors of this volume are based, until a quarter of a century ago the scholarly fields of History of Education and Comparative and International Education (particularly in curricula and dominant paradigms) had a firm, if controversial foothold especially in teacher education and postgraduate education programmes. They, however, fell victim to broader education reform movements which – unintentionally but unfortunately – resulted in the marginalisation and even disappearance of these fields as constituent parts of education programmes.

The latest (2015) directive about teacher education programmes from the South African Ministry of Higher Education once again commendably creates a well-deserved space for Foundations of Education disciplines (including History of Education and Comparative and International Education). In the belief that a re-built History of Education and Comparative and International Education in South Africa should answer the call – emanating from both the public and scholarly discourse on education and education research in South Africa and beyond – the editors put together this volume.

This publication is also an attempt at a decolonised, inclusive perspective on a dominant Eurocentric university curriculum that most university students experienced to be alienating and disconnected from their socio-economic context, as expressed by the *#RhodesMustFall* movement. Students across South African universities unequivocally expressed their displeasure of a higher education system that failed to transform after more than two decades of democracy. This publication recognises the need for curriculum transformation to go hand in hand with decolonisation. An objective of transformation is the restoration of epistemic and social justice so as to restore the dignity and rightful contribution of historically marginalised people to world civilisation, generally discarded and suppressed by colonial writers and their protégés. Therefore, this publication references some great African civilisations that were world leaders in knowledge and trade at a time when Europe was largely backward.

This publication deals with History of Education and Comparative and International Education as fields of study. Their roles are discussed from the decolonised perspective of scholars from the Global South. This publication does not cover a complete history of education and comparative education, rather it provides a space for learners and scholars of history of education and comparative education to begin theorising about the decolonisation project in the Global South. This publication also elaborates on History of Education, as a field of study and trends that emerge during various historical epochs, as well as their meanings for education and the public. A history of education from the pre-colonial times up to the dawn of the new democracy in South Africa is presented.

Comparative and international education are more closely related to globalisation, a movement facilitated through the advances in information, communication and technological (ICT), that is increasingly shaping and influencing educational systems in one way or another. While educational systems are arguably seen as becoming similar in structure and function, a study of comparative systems of education should assist in guarding against an uncritical substitution and adoption of systems and curricula, as has happened recently after South Africa became a democracy in 1994.

An outcomes-based educational (OBE) system which underpinned the approach to Curriculum (2005), was borrowed from Australia and New Zealand but did not take account of the context, resource bases and classroom realities of South African schools (Maodzwa-Taruvinga & Cross, 2009). The post-apartheid educational system was deeply influenced by this act of borrowing resulting in a number of curriculum reforms that were instituted to remediate the problems that teachers were experiencing. Comparative education as a field of study investigates the history and diversity in aspects of educational systems, which could be useful in addressing issues of educational concern. The historical evolution and significance of comparative and international education as a field of study is presented in the book in a number of case studies.

Chapter 1 starts with a discussion of the global education expansion drive, which took place after the mid-21st century, societal antecedents of this global education and the challenges facing education in the Global South.

Chapter 2 provides a conceptual clarification of the term ‘History of Education’, its significance and how it was offered at universities at different historical times. It provides approaches to how the Global South can begin recentering and legitimising their history of education.

Chapter 3 focuses on different historical phases and their influences on the history of indigenous people. This chapter also provides a synopsis of how indigenous people received their education before the colonial period. This chapter postulates that indigenous epistemology, which was marginalised by colonial systems, may contribute to existing new knowledge systems.

Chapter 4 presents an overview of the history of missionary societies since the 1600s to the 20th century. It discusses different approaches missionaries used to evangelise the unconverted and introduces the historiography of the work done by South African Christian movements.

Chapter 5 provides a historical context of Muslim education in South Africa, from colonisation to the democratic era. This chapter provides a critical historical overview of Muslim education in South Africa since its earliest beginnings. It goes back to the first Muslim schools during the colonial period and shows how a group of the subaltern, despite political oppression and marginalisation, used education and religion to preserve their human dignity. A literature review of Muslim education was conducted to construct a history of education that started from a system of Madrasahs to the establishment of the ‘Muslim mission school’ and ultimately of the independent Muslim schools.

Chapter 6 discusses specific issues in the history of schooling during the National Party government rule (1948–1990). This chapter presents the education of white people and its underlying philosophy of Christian National Education, which becomes the basis of education models for ‘coloured people’, ‘Indian people’ and ‘African people’. The concept ‘race’ is used as a social construct. The authors reject the notion of separate ‘races’ and reiterate that there is only one human race: *homo sapiens*, and the term ‘black’ is used to include ‘African people’, ‘Indian people’ and ‘coloured people’.

Chapter 7 deals with some case studies of the decolonisation of the colonial schooling system during the post-colonial period. Timbuktu and the Great Zimbabwe are discussed as examples of African civilisations. These examples are manifestations of high African culture that arguably contributed towards the birth of the Renaissance movement. During the post-colonial period, some African countries introduced their locally formulated schooling systems, which were informed by African philosophy. Two selected case studies of African philosophy and pedagogy of the Ujamaa schools in Tanzania and the Harambee schools in Kenya are discussed.

Chapter 8 discusses the scholarly field of Comparative and International Education and identifies its contribution and significance. This chapter also proposes the prospects for the field in the Global South. These include a sorely needed field of scholarship, however, to guide the education expansion project taking place globally but with its centre

indisputably located in the Global South. Radical changes are called for in the theoretical edifice and research agenda of Comparative Education to facilitate this process.

Chapters 9–13 discuss five national education systems (India, Tanzania, Turkey, Chile and Republic of Iran). The geography, history, demography, social and political systems, economy, religion and education of the five countries, form the subject of these chapters.

Chapter 9 gives an overview of the developments of and issues in Indian education since it won freedom from colonial rulers in 1947. It provides a summary of contextual factors of the country and goes into the evolution of modern education in the country.

In Chapter 10, the author attempts to define the contexts through which education is provided in Tanzania. It is noted in this chapter that Tanzania has created a positive environment responsive to all forms of education. Turkey, the 17th largest economic power in the world since its establishment as a Republic, has been following and implementing the Western educational approaches and philosophies in its educational system.

Chapter 11 discusses how these approaches were implemented in different ladders of the education system.

Chapter 12 argues that the roots of current inequality in Chile's education and in its social and economic order, were laid down during the colonial period of its history. This chapter explains that the education of the native people was ignored over time. While successive waves of immigrants increased the complexity of Chilean society, schooling continued to impose a model adapted to a different geography.

Chapter 13 provides a comprehensive sketch of the history of Iranian/Persian education from the ancient to the present. This chapter notes that Iran's intellectual legacy offers some useful theoretical perspectives to address the epistemological injustice that characterises the dominant Eurocentric thinking prevalent in higher education institutions.

Chapter 14 engages in debates on what constitutes curriculum and how it is theorised and practised. Further, this chapter articulates issues in curriculum and (de) coloniality. This chapter looks at how South African native languages can be used to deliver a decolonised curriculum.

Chapter 15 discusses the conceptualisation of higher education in South Africa before and after the democratic era (pre-1994 and post-1994). This chapter engages with the notion of internationalisation and growth of higher education in South Africa.

Chapter 16 provides guidelines on how to write a research proposal. It describes eight steps that constitute the research process. The chapter briefly introduces the historical research method, visual methods, oral history and narrative research. It concludes by giving an overview of a few steps on how to construct a research report or an article for publication.

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Chapter

1

The rise of the Global South in the Global Education Project: Achievements and challenges

Charl C Wolhuter

Introduction

History books typify the 20th century by events or phenomena such as the information and technology revolution, the atomic age, relativity theory, the space age or the population explosion. Yet one signature feature of the world since the mid-20th century, the global expansion of education – the bulk of it in countries of the Global South – has not been given the same significance. In less than 70 years since 1950, more education expansion has taken place than in the entire human history up to 1950. Education has become the largest single item on the budget of state expenditure in most countries of the world.

This chapter is an introduction to the rest of the book and will present a panoramic view of the global education expansion project after the mid-20th century, as well as assess the achievements and identify the challenges for the Global South. This chapter begins with the causes or societal antecedents of this global education expansion drive, followed by the course of this project, and ends with the challenges for education in the Global South.

The causes of the global education expansion drive

The forceful worldwide drive for the expansion of education emerged suddenly. This calls the question as to the reasons for this drive. Before this question will be answered, the long history of sparse and uneven education participation will first be sketched, in order to appreciate the radical change the expansion brought about.

A long history of thinly spread education

For the largest part of human history, schooling has been very sparsely supplied. The aggregate global adult literacy rate in 1900 – literacy defined then as the basic minimum of educational attainment – was but 20 per cent (i.e. in 1900 only 20 per cent of adult people in the world could read and write) (Mortimer, 2014:268). By 1930 it was 40 per cent and only in 1955 did the literacy rate reach 50 per cent (Trewartha, 1969:173). Why then this sudden feverish pursuit of education in the world since the mid-20th century?

Education systems are the outcome of contextual societal forces, and similarly, the reasons for the take-off of the global education expansion project lie in the societal features (i.e. social, political and economic) of the post-1950 world. (The basic theorem of the field of Comparative Education will be explained in more detail in Chapter 8.)

Social causes

The disappearance of the housewife and full-time stay-at-home mothers, as well as the increased absorption of women into the labour market, have created a need for schools as substitute caretakers of children (Husen, 1979:39).

Then too, in the democracies of the Global North with the emphasis in the public discourse on equal opportunities, schools became instruments to facilitate individual

social mobility (ibid.:74). Large parts of the Global South (South and East Asia and Africa in particular) became independent in the decades following the end of the Second World War. These countries were underdeveloped with poor infrastructure, health services and housing, among others. Modernisation theory became fashionable by the 1960s (cf. Kelly et al., 1982:516). Modernisation theory held that these countries had to develop, but more important, they had to emulate the developmental trajectory of the developed world, i.e. countries of the Global North, (cf. Reyes, 2001). Education was deemed the major instrument to effect modernisation, i.e. to develop these countries (Fägerlind & Saha, 1984:42).

Political causes

One of the most salient features of the modern world (i.e. the world as it has taken shape over the past few centuries), is the rise of the nation-state. The nation-state has become a powerful social, economic and political institution. According to Idenburg (1975:71) one of the most prominent features of modernisation is the centralisation of policy formation. This trend was made possible and could partly be explained by technological improvements in transport and communication (the train, the telegraph, the radio, the automobile, aviation) which made possible the formulation, administration and enforcement of policy at and from one central point.

Systems of national, compulsory education (first at primary level, later progressively extended to secondary level) were created by central states/governments, initially in the economically most advanced states of Western Europe and North America in the second half of the 19th century, and later in countries in other parts of the world. Through compulsory, nationally uniform and governed systems of education, the state intended to modernise itself, push economic growth (to be discussed in the next section), train a corps of civil servants (the more and more powerful state needed an ever-swelling civil service) and above all, create a national consciousness (cf. Hartshorne, 1989:103). (The goals of modernising the state and economic growth have been discussed in more detail in Chapter 8.)

The state, inter alia by means of education, wanted to mould national unity and, for this purpose, to suppress identifications with local, smaller entities – be it local or provincial geographical entities, family or clan entities, or social class entities (cf. Cohen, 1970:74).

The rising Creed of Human Rights is one of the political causes of the global education expansion project. The atrocities of the Second World War and the years preceding the war resulted in the internationalisation of the Creed of Human Rights. The creed stipulates that every human being is entitled to a host of human rights that are inalienable and beyond the will or whim of any democratic majority. Education in some form is regarded as one of these human rights. On 10 December 1948, the General Assembly of the United Nations (UN) accepted the Universal Declaration of Human Rights (cf. United Nations, 2016). This basic declaration of human rights has subsequently been complemented by a myriad of manifestos at international, supranational and national levels.

The United Nations Universal Declaration of Human Rights in Article 26 states the following on education:

1. Everyone has the right to education. Education shall be free, at least in the elementary stages. Elementary education shall be compulsory. Technical and professional education shall be made more generally available, and higher education shall be equally accessible on the basis of merit.
2. Education shall be directed to the full development of the human personality and to the strengthening of and respect for human rights and fundamental freedoms. It shall promote understanding, tolerance and friendship among all nations, races, and religious groups, and shall further the activities of the United Nations for the maintenance of peace.
3. Parents have a prior right to choose the kind of education that shall be given to their children.

Economic causes

For centuries, or rather millennia, schools were not considered a factor (at least any positive factor) in the production process of the economy. At most the school was considered a consumer item rather than a production item.

The word school comes from an ancient Greek word denoting 'spending of free time', i.e. the school was depicted as an institution in which children of the idle rich or privileged led a life of leisure. In neither Karl Marx's *Das Kapital* (the Bible of Communism or radical Socialism) nor in Adam Smith's *The Wealth of Nations* (the Bible of free market or capitalist economics) is the school germane to the economic production process. In WW Rostow's well-known model of the stages of economic growth of economies, education is not a factor driving the process of economic growth. The same applies for the economic theories of other great economists such as Ricardo, Schumpeter or Hayek. Economic growth and development were always depicted as the outcome of factors of forces other than education.

All this changed in the decades after the Second World War. The new thought culminated in the Human Capital Theory of Theodore W Schultz. Schultz, professor of Economy at the University of Chicago in the United States (US) and winner of the Nobel Memorial Prize in Economic Sciences in 1979, formulated his Theory of Human Capital in his Presidential Address to the American Economic Association:

'Although it is obvious that people acquire useful skills and knowledge, it is not obvious that these skills and knowledge are a form of capital, that this capital is in substantial part a product of deliberate investment, that it has grown in Western societies at a much faster rate than conventional (nonhuman) capital, and that its growth may well be the most distinctive feature of the economic system. It has been widely observed that increases in national output have been large compared

with the increases of land, man-hours, (sic) and physical reproducible capital. Investment in human capital is probably the major explanation for this difference.’ (Schultz, 1961:1)

Thus, Schultz included human capital (or investment in education) as a production factor, alongside other factors such as (monetary) capital, land, machinery and infrastructure, entrepreneurship, labour (i.e. physical human resources) and consumers, determining the level of economic output of a society. Schultz’s Human Capital Theory resulted in a revolution in economic (and education) thought (cf. Sobel, 1982).

In another important publication at the time, Frederick Harbison and Charles A Myers in their research found a strong positive correlation between the size of education effort (measured in terms of gross enrolment ratios at primary and secondary education levels) and economic output (measured in terms of per capita gross national income) for 75 countries (Harbison & Myers, 1964).

Thus, a ceilingless belief in the power of education to effect any desirable change in society evolved in the decades after the Second World War. For example, someone who wishes to reduce the incidence of aggression in society advocates ‘anti-aggression education’, or the person who is concerned about pollution pleads for ‘environmental education’.

This limitless belief in the power of education paved the way for the meteoric education expansion worldwide, which commenced during the second half of the 20th century and is still proceeding unabated. The following two sections will outline the course and the extent of this global education expansion project.

The historical trajectory of the global education expansion drive

This section will discuss the historical roots of schools and the geographical paths that defined their spread worldwide.

The origin of schools

Archaeological evidence shows that schools appeared for the first time in history in Ancient Mesopotamia, around the middle of the third millennium BCE (cf. Roaf, 1995). Archaeologists found many clay tablets dating from about 2500 BCE and probably the earliest school classroom dating from about 2000 BCE. Two rooms with many rows of desks made of raw bricks were found in a palace at Mari near the Euphrates River. Each desk was able to accommodate between one and four learners (Roaf, 1995).

There are very few places in the world where schools evolved autochthonously: Mesopotamia, possibly Egypt and ancient China (it is not clear whether schools

evolved in these civilisations autochthonously or whether the institution spread from Mesopotamia (Power, 1970:18)), and the meso-Amerindian states of the Maya, the Aztecs and the Inca. In all other parts of the world, schools were imported from outside (and even in all these locations: Iraq, as Mesopotamia is called today, China and Mexico, where the Amerindian states were, schools today bear the imprint of foreign models and imports much more than any of these ancient institutions).

The global spread of schools

By the early Middle Ages, two types of schools existed in Europe, namely the Cathedral schools and the Monastic schools. Both were tasked with training the clergy, i.e. leaders and officials of the (Roman Catholic) church. While these were religious, they carried the imprint of the ancient Mesopotamian and ancient Egyptian institutions that served as models of schools. Later, secular schools such as the Palace schools developed in addition to medieval European church institutions, but similarly the imprint of the Cathedral and Monastic schools were visible, as was the case in the national systems of public schools that originated in Western Europe in the 19th century. These schools were exported as the European powers colonised the rest of the world (Americas, Asia and Africa) from the 16th century. In the colonies, they occurred as Missionary and as Colonial schools and served only a tiny elitist and privileged minority of the population. They were not systems of mass education. From curricula, language of learning and teaching, and supply of teachers, right down to school uniforms and architecture of buildings, these schools displayed their European origins.

However, during the decades after the Second World War, governments and the public at large felt the political, social and economic pressure to expand schools into mass education systems. The world outside Western Europe and North America began with what Coombs (1985:70) calls ‘a pocket-size version of the education systems found in their erstwhile colonial mother countries’, not at all suited to the context and needs of their own countries. Rather than taking the slow and expensive route of developing systems of education consonant with their own needs and contexts, they simply embarked on a strategy of linear expansion of existing or inherited education systems, a strategy that Coombs (1985:6) describes as ‘more of the same’.

The tendency to emulate the education systems of Western Europe and North America has been strengthened by the economic and political power the world powers located in these regions wield. Publishing houses are situated mainly in these regions. (For a description of how the asymmetry in power relations in the world affect education, the interested reader is referred to the publications of Altbach, 1982 and Wollhuter, 2018).

While copying Western European and North American education constitutes a major problem, education systems are the outcomes of contextual factors. Societies create education systems to serve themselves. For example, the American education system has been shaped by forces extant in the American national context and the Japanese education system by the national context of Japan. This is a basic theorem of

Comparative Education and will be returned to in Chapter 8. To elaborate, the following sets of contextual forces shaping education systems can be distinguished.

Geography

Aspects in the context of geography that have a bearing on the education system are location, size, shape, topography, climate and biota: In the case of a national education system, it will refer to the location, size and shape of a country, for example.

Demography

Demography refers to population features and dynamics. Salient aspects of demography that shape education systems are the population size, population density, population growth rate and the age profile of a population.

Social system

Aspects of the social system that impact on education are the system of social stratification, the existence of social capital and social maladies, cultural patterns and language patterns.

Economy

Aspects of the economy that impact on education include the level of economic development and the structure of economic activities. The level of economic development in a country, or the degree of affluence of a community, determines the amount of funding for schools, for teachers and for other educational resources and expenditures. The proportion of a country's workforce, as well as the economic activities they are engaged in, will have a bearing on its education system, particularly on how it prepares learners for their future careers. The structure of economic activities of a national economy is commonly divided into the following categories:

- Primary, or extractive, economic activities: the proportion of the workforce that is engaged in agriculture, mining, fisheries and forestry;
- Secondary, or manufacturing, industries: the proportion of the workforce that is working in factories; and
- The tertiary sector of the economy, or the service sector: the proportion of the workforce that is engaged in services, e.g. the civil service, banks, transport and education.

The level of technological development

The level of technological development of a country or community will determine the nature of its education system, as well as what is possible in that system.

Political system

The political system of a country is another shaping force of its education system. The policies of the ruling party determine the type of education system that it will choose, as well as the educational goals and curricula in schools.

Religion, life and world view

The final set of societal contextual forces that shape education systems is religion, life and world view. The life and world view of people in a society will determine, for example, the values that are taught to learners in schools.

The above means that when an education system is simply transposed from one context onto another, chances are high that it will be inappropriate for and even dysfunctional within the new context. For example, it would be inappropriate and even dysfunctional to teach learners in any African country about amphibians using a biology textbook produced in the United Kingdom with a species of frog which does not exist in that African country.

The proportions of the global education expansion project

Attention should be paid to three dimensions in the assessment of any education project (cf. Wolhuter, 2014).

The quantitative dimension

The quantitative dimension refers to participation in education. This is measured by enrolments, or numbers of learners at primary, secondary and higher education levels. A commonly used index is also gross enrolment ratio. Gross primary school enrolment ratio refers to the number of learners in primary schools divided by the total population of primary school attending age. Gross secondary school enrolment ratio refers to the number of learners in secondary schools divided by the total population of secondary school attending age. Gross higher education enrolment ratio refers to the number of learners in higher education institutions divided by the total population of higher education attending age.

The qualitative dimension

Participation (or enrolment numbers) in education does not tell the whole story. The quality of education should supplement participation. Education quality is a difficult concept. It is more meaningful to look at the components of education quality: input quality, process quality, outcome quality and product quality (cf. Wolhuter, 2014). Input quality refers to financial investment in education and physical infrastructure, such as desks or tables. A commonly used index of input quality is the number of learners per teacher (or the learner-teacher ratio). Process quality refers to teaching and learning in educational institutions, and output quality to examination results. Product quality refers to the value of the graduate in the world outside the school or educational institution.

The equality dimension

Finally, how the quality is spread over the entire population is an important consideration. Equality in education is a contested concept, with no universally accepted definition available. However, in education systems around the world the trinity (or three main) forms of inequality are gender inequality, socio-economic inequality (children from middle-class and upper-class families having more and better educational opportunities than children from working class parents) and racial or ethnic inequality.

Starting with the quantitative dimension, the growth in enrolments and enrolment ratios worldwide since the mid-1950s are presented respectively in Tables 1.1 and 1.2.

Table 1.1 Growth in enrolments worldwide (x 000), 1950–2014

Year	Primary education	Secondary education	Higher education
1950	177 145	38 040	6 317
1960	243 487	68 926	11 174
1970	411 304	169 227	28 084
1980	541 556	264 379	51 037
1990	596 853	315 008	88 613
2000	654 722	450 397	99 511
2010	695 204	579 207	180 207
2015	724 094	568 019	212 670

(Sources of data: UNESCO, 1971, 1977, 1999, 2018)

Table 1.2 Growth in global gross education enrolment ratios, 1950–2014 (percentages)

Year	Primary education	Secondary education	Higher education
1950	59	13	5
1960	62	40	8
1970	89	36	9
1980	96	46	12
1990	99	52	14
2000	99	60	19
2010	107*	70	30
2015	104*	76	36

(Sources of data: UNESCO, 1971, 1977 1999, 2018) (1950 figures imputed from best available data on demographics and enrolments)

* Figures over 100 owing to numbers of overaged learners in primary schools.

The global aggregate figures on the previous page hide stark regional and national variations. For example, see Table 1. 3 for variations in gross higher education enrolment ratios.

Table 1.3 Regional gross higher education enrolment ratios

Region	Gross higher education enrolment ratio (2015) (percentages)
Europe	70.36
Oceania	61.85
North America	59.81
South America	56.06
Asia	33.33
Africa	12.78

(Source of data: UNESCO, 2018–2)

A conspicuous global disparity is the Global North–Global South divide. The term Global South was first used by Carl Oglesby, in 1969. In recent years it is increasingly used in scholarly literature and in public debate alike, often to avoid terms such as Third World or developing countries, both of which are widely considered problematic, even derogatory. Global South refers broadly to Africa, the Middle East, Latin America and (what was long termed) the developing countries of Asia – India, Malaysia, China; to contrast these parts of the world with the Global North, comprising of Western Europe, North America, Oceania and (what was long known as) the developed countries of Asia – Japan, Singapore, Taiwan, South Korea and Hong Kong. Strongly implied in the usage of these terms are asymmetrical power relations, with the Global North exercising a global hegemony over the countries of the Global South.

The inclusion of countries under the Global North and Global South is debatable. Many scholars, for example, include Turkey under the Global North. In this publication, Turkey is considered part of the Global South, inter alia because the country is on the peripheral side of the global binary divide in power relations (cf. for example the battle of Turkey to be admitted to the European Union).

In the qualitative dimension, the concept of educational quality defies an easy, one-line definition. Rather than attempting to define educational quality, Bergmann (1996) contends that it is more meaningful to enumerate the components of educational quality. The following four elements of educational quality, adapted by Wolhuter (2014) from the model of Bergmann (1996), will be used in this chapter.

- Input quality refers to the quality of financial and physical (physical facilities and infrastructure) input.

- Process quality is the quality of teaching and learning taking place in the education project.
- Output quality is the outcome of the learning process, i.e. the achievement levels of learners at the end of the education process.
- Product quality refers to the effect of education – or the impact thereof – which the graduated product makes. One commonly used measure of this is, for example, to calculate the rates of return to education.

While input quality is rather simple and easy to measure and data are readily available (for example annual per learner public expenditure, or number of learners per teacher), process quality is more complex. The following sub-components of process quality can be distinguished: the administrative sub-structure, the curriculum, the school environment, the teacher factor, the parent and family-home factor, and the learner factor (cf. Wolhuter, 2014). School environment entails leadership, school climate and organisational culture of a school (cf. Wolhuter & Van der Walt, 2018). The teacher factor entails the training/education levels of the teacher corps, their experience, and their input/commitment; while the learner factor refers to the input made by the learner (ibid.).

Output quality can be measured quite easily by means of examination or assessment results, and such data are readily available (as in the case, for example, of matric examination results in South Africa). Product quality can include a wide range of societal dividends expected from investment in education. For example, in South Africa, the objectives of education include:

- **Economic goals** – the eradication of poverty and the promotion of the country's economic productivity and development
- **Social goals** – building a society free of racial, gender and other forms of unfair discrimination, creating a socially-mobile society and the removal of artificial hierarchies and abstractions in the way of progress
- **Cultural goals** – empowering people so that they can participate in the process of cultural expression, and
- **Political goals** – empowering citizens to take part in the processes of a democratic society, nation building; building a communal value system for a society characterised by democracy, equality, freedom, peace, justice, tolerance and stability (Wolhuter, 2015).

Indirect determinants of education quality are the societal-contextual forces impacting on the school, and which place school management and leaders before particular challenges (cf. Wolhuter & Van der Walt, 2018). These contextual forces are geographical forces, demographic factors, the social system, the economy, politics and religious-life philosophical factors (cf. Wolhuter et al., 2018).

Globally there are large variations in educational quality (cf. Wolhuter, 2011). The first fault line visible on a global scale is between the Global North and the Global South. Space prevents a discussion of all the facets of education quality, but in Table 1.4,

variations in learners per teacher at primary school level, as one aspect of input quality, illustrates this point of the Global North–Global South education quality divide.

Table 1.4 Learner-teacher ratio at primary school level in different regions of the world

Region	Numbers of learners per teachers at primary school level
South Africa	33.6
Global Aggregate	23.3
North America and Western Europe	14.1
Central and Eastern Europe	16.7
East Asia – Pacific	17.6
Central Asia	17.7
North Africa – Middle East	19.8
Latin America – Caribbean	21.9
South and Western Asia	32.6
Sub-Saharan Africa	38.8

(Source of data: UNESCO, 2018–2)

The third dimension in evaluating any education project is equality. Defining the concept of educational opportunities is difficult (cf. Wolhuter, 1993:76–77). Furthermore, Lazenby (2016:65) in his opening remarks on a discussion of the terms says that even though there is considerable disagreement on the requirements for equality of opportunity in education, the Canadian comparativist model of the late Joseph Farrell distinguishes between four facets (Farrell, 1982 – first published in 1982, reworked and republished, 2013):

- **Equality of Access** – the statistical chances that learners from various social categories could enter the school system.
- **Equality of Survival** – the statistical chances that learners from various social categories would reach a particular level in the school system (e.g. the last year of secondary school).
- **Equality of Output** – the statistical chances that learners from various social categories would achieve the same outcomes (e.g. pass the matriculation examination).
- **Equality of Product** – the statistical chances that learners from various social categories with the same educational qualifications would be able to obtain the same jobs, incomes and life opportunities.

Other well-known models of equality in education include that of Tyler (1977) and that of Westen (2016).

The three main dimensions of educational inequality in the world, also called the ‘trinity of inequality’ are gender, socio-economic status and race/ethnicity. Inequalities in education in various countries tend to be inversely correlated with the level of development. Hence, as in the case of educational quality, the first salient fault line in educational equality in the world, is the Global North–Global South divide with inequalities being much more starkly visible in the countries of the Global North. This can be illustrated by means of differences in male and female adult literacy rates in various world regions, as presented in Table 1.5.

Table 1.5 Gender differential in adult literacy levels in various world parts

Region	Adult literacy levels (2014) (percentage)	
	Males	Females
North America	96.71	95.89
Europe	99.43	99.07
Latin America	93.49	93.24
Oceania (developing countries)	73.13	69.19
Asia	89.19	79.63
Africa	71.77	55.59

(Source of statistics: UNESCO, 2018)

Challenges for education in the Global South

The challenges for education in the Global South will be discussed using the above distinction of the quantitative, qualitative and equality dimensions as analytical framework, before zooming in on the specific issues of the curriculum, assessment, learning, as well as the language of learning and teaching.

Quantitative

The impressive quantitative extent of the global education expansion project, in which the Global South makes up the bulk with an increasing percentage of enrolments, has been presented in Tables 1.1 and 1.2. At the same time, the Global South is lagging behind the Global North, as is clear in the tables on gross tertiary enrolment figures in various regions of the world, presented in Table 1.3.

This discrepancy is, however, not limited to higher education levels. Worldwide 59 million children of primary school age and 65 million children of lower secondary school age, are not in schools (UNESCO, 2015:36), most of them in the countries of

the Global South. The average number of years of formal education for the population 15 years and older in 2010 was: Global average – 7.8 years; Global North – 11.0 years; Global South – 7.1 years (Barro & Lee, 2010). These figures rose from the following in 1950: Global aggregate – 3.2 years; Global North – 6.2 years; Global South – 2.1 years (ibid.), thus the gap is narrowing but remains substantial.

Qualitative

It has been demonstrated above, with the example of statistics on learner–teacher ratios at primary school level, that the Global South is also trailing the Global North in quality of education. Evidence points to rising levels of low quality in education and educational outcomes in the world. Worldwide, 250 million primary school learners, 50 per cent of whom have spent at least four years in school, cannot read and write at the minimum level (UNESCO, 2015:36).

An indication of the situation of the Global South can be gleaned from the results of the 2015 TIMSS (Trends in International Mathematics and Science Study) international test series. Among participating countries, the following percentages of Grade 4 learners could attain the high benchmark grade in the Mathematics test:

Table 1.6 Percentage of Grade 4 learners who attained a benchmark grade in Mathematics

Country	Grade 4 learners who attained benchmark grade in Mathematics (%)
Singapore	80
Hong Kong	80
South Korea	80
Japan	76
Northern Ireland	74
United States	47
Denmark	46
England	49
Turkey	25
South Africa	5
Chile	10
Indonesia	3
Kuwait	3

(Source: TIMSS, 2015)

Equality

It has been demonstrated above, with the example of gender differentials in adult literacy rates, that inequality in education in the world is rife, and more acutely so in the Global South. In Ghana, children from the richest 20 per cent of households spend six more years at school than those from the poorest 20 per cent of households (Watkins, 2013). At the time of writing, March 2018, UNESCO had just released an extensive handbook on the conceptualisation of equality in education, as well as indices to measure inequality in education (UNESCO, 2018–1). The problem at this stage is the lack of available data in the world to calculate these indices.

Curriculum

The problem with curricula in the Global South is that they contain a disproportionate amount of material or content from the Global North, to the detriment of the natural and cultural heritage of the Global South. As explained earlier in this chapter, the formal education systems in the Global South did not develop autochthonously but originated as part of the colonial project. Education systems and curricula from the mother countries were transported wholesale to the colonies.

Because of the expensive nature of developing new curricula and because of the unbalanced global knowledge production system – the brain centre of which is in the Global North (cf. Wolhuter, 2017), the inappropriate curriculum inherited from colonial times, has persisted long after the attainment of independence. The dilemma is that, even if it were logistically possible to embrace completely the natural and cultural heritage of the Global South in curricula, the present age of globalisation and the need for Global Citizenship Education (for example, the need to produce globally competitive workers) preclude such an option and ask for a fine balance between the national/local and the global in curricula.

Assessment

Assessment practices in education in the Global South too are a relic of firstly, the colonial transposing of education systems and secondly, of the past. The problem is that examinations typically tend to test whether the learner is ready for the next level/grade in the system, rather than to measure the extent to which the learner can use his/her new knowledge for the benefit of the community of which he/she is part of. Such a model for assessment has not yet been devised. Two other problems are that, firstly it tends to be ‘assessment *of* learning’ rather than the pedagogically more desirable ‘assessment *for* learning’ and ‘assessment *as* learning’. Secondly, assessment concentrates on testing lower order cognitive skills, memorisation specifically, to the exclusion of higher order learning goals such as comprehension, application, analysis, synthesis, evaluation or creativity.

Learning

There is a common criticism in many parts of the Global South that learning for learners amounts to rote learning, to the detriment or even exclusion of higher forms of learning and of the development of critical and independent thinking faculties. This holds true even for learning at university level (cf. World Bank, 2011:90–95).

Learning needs to be culturally appropriate. In the Global South, learning still tends to be predicated on Western epistemologies and ways of constructing knowledge. Thus, the tapestry of epistemologies of the extra-Western world is negated, amounting to the wastage of a rich source of epistemologies. Research has shown in the cultures of East Asia that learning takes place quite differently from learning in the Western cultures (cf. Nisbett, 2003; Hayhoe & Li, 2017:33–34); however, these indigenous epistemologies have not yet come into their own in the education systems of East Asia. In other parts of the extra-Western world, the mapping of indigenous epistemologies has not even begun, let alone been taken up in their education systems.

Language of learning and teaching

A very conspicuous and pervasive persistent influence of the Global North on the education systems in the Global South is the language of learning and teaching. This is especially so in the countries of sub-Saharan Africa, where English, French and Portuguese continue to be the languages of learning and teaching even at primary school level. It is not only the historical relic that accounts for this but also the value of especially English in the international market/labour place.

However, when the language of learning and teaching is not the first language (or mother tongue) of the learner, empirical evidence has shown that this has a detrimental effect on the learner's achievement levels, and therefore, also on cognitive development and life chances (cf. Thomas & Collier, 1997; UNESCO, 1953; World Bank, 2005; Morris & Adamson, 2010:156). Outside sub-Saharan Africa at the higher levels of the education systems of the Global South, English is predominant as a language of instruction, in international programmes and where there are expatriates and visiting faculty, as well as in textbooks.

Conclusion

In a world dominated by asymmetrical power relations in favour of the Global North, as well as in the production of knowledge and its transmission in education systems, there is a rising presence of the Global South, demographically and also economically. The example of Africa can be cited. The second biggest continent in size (after Asia, also, tellingly, part of the Global South), Africa covers a surface area of 36.2 million km². The total population of the continent has surpassed the one billion mark and currently stands at 1.15 billion (World Bank, 2015), after overtaking Europe in total population

numbers somewhere during the 1990s (in 1960 Africa's total population was still half that of Europe). As a continent, Africa has the 8th largest economy in the world, with an annual gross economic output of US\$2 251.2 billion (after the United States, China, Japan, Germany, France, the United Kingdom and Chile) (World Bank, 2015:24–27). An indication of the relative swift economic growth of the continent is that as recently as 2009, Africa was the eleventh biggest economy in the world (Mahajan, 2009:8).

This economic and demographic rise of the Global South is matched by a concomitant expansion of education. However spectacular this education expansion, it faces formidable challenges quantitatively, qualitatively, and on the equality front. These challenges will have to be addressed to open the way for the Global South to reach its maximum levels economically and to take its rightful place in the global community of nations. One of the means available to the Global South to facilitate the approach to educational challenges is research in the scholarly fields of History of Education and Comparative and International Education.

Learning from each other about best education ideas, policies and practices, benefitting from each other's education experience by means of the two sibling fields, will be the topics of the next chapters. In Chapter 3, the field of History of Education will be introduced – what History of Education is all about and the significance of that field of scholarship. Then three main phases in the historical evolution of education in the nations of the Global South will be introduced – indigenous education, colonial education and post-independence education initiatives. The focus will shift to Comparative and International Education. First the concept will be clarified, and the purpose of the field explained. Six national education systems in various parts of the Global South will then be discussed (Tanzania, South Africa, Turkey, Iran, India and Chile). This will be followed by chapters on several themes about three critical issues in education in the Global South – curriculum, higher education, and the language of learning and teaching. In the concluding chapter, guidelines will be provided for the learner to conduct a research project, drawing on the historical and comparative methods in education.

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