

HIGHER EDUCATION FUNDING, JUSTICE AND EQUITY – CRITICAL PERSPECTIVES

S. Motala

South African Research Chair in Teaching and Learning

University of Johannesburg

Johannesburg, South Africa

<https://orcid.org/0000-0003-1341-7019>

M. Oketch

University College London

United Kingdom

<https://orcid.org/0000-0002-9901-6373>

G. W. Ouma

University of Pretoria

Pretoria, South Africa

<https://orcid.org/0000-0003-4146-5931>

M. Masutha

University of Johannesburg

Johannesburg, South Africa

<https://orcid.org/0000-0001-9822-0930>

INTRODUCTION

How governments choose to fund students in higher education (HE) is inextricably linked to the sector's sustainability and efforts to achieve a just and equitable HE experience and outcomes for all students. The way funding mechanisms are structured and subsequently enacted within the university, has far-reaching consequences, with the implications reaching far beyond the walls of the institution (Shermer 2021). In the context of austerity, marketisation, credentialisation and related neoliberal conceptions of education and society, student funding models have greatly transformed the sector and its role in enabling or hindering efforts to achieve a more just and equitable society (Quinlan 2014). However, despite well-intentioned global and national-level policy commitments to achieving justice and equity in and through HE, the persistent effects of geography, race, wealth, gender, and class-based disparities in

patterns of access, participation and attainment rates have undermined the idea of HE as a vehicle for just and equitable futures and transformation (Boliver 2017). Higher education institutions globally find themselves at a crossroads of trying to maintain their core purpose as a public good on the one hand and compliance with global neoliberal policies, which are foundational to the modern university on the other. The tension between these contested and seemingly contradicting paradigms is made visible in how universities respond to issues of inclusion, equity and in how and what they choose to fund.

Over and above this, universities are still reeling and recovering from a global pandemic that has changed the shape and feel of higher education. The dual effects of the pandemic have led to a forceful change in teaching, learning and research engagements shaking up archaic, practices by bringing technology into the classroom, but it has also laid bare the vastness of inequalities that persist between students from different classes and races. Whilst these effects have been well documented, the extent of how the pandemic has impacted universities is yet to be determined. For countries in the Global South, and Africa in particular, it will likely worsen what have already been untenable conditions for universities and the communities they serve.

In South Africa, due to its post-colonial and post-conflict condition, historical legacies have shaped these effects in very particular ways, with very different experiences emerging in comparison to other geopolitical spaces in the Global South. As one of the most unequal societies in the world (Pomerantz 2019), enduring legacies are particularly reflected in how racial inequality intersects with class, geography and gender to reproduce and sustain the country's income, wealth and spatial inequality of access to and successful outcomes in education (Chatterjee, Czajka, and Gethin 2020).

With mixed results, governments around the world have used various student financial aid models to assist students from traditionally excluded communities to access HE. The South African government established the National Student Financial Aid Scheme (NSFAS), an income-contingent loan (ICL) model aimed at transforming and widening participation by students from historically marginalised communities. Despite NSFAS' notable contribution to transforming the demographic makeup of the student population, the limitations of this ICL model have ranged from administrative deficiencies, unfunded and underfunded students, misalignment with student needs, high non-completion rates and the violence that accompanies graduates'/and or dropouts' indebtedness. Most recently, the NSFAS model has been at the centre of frequent sector-wide instability, with the #FeesMustFall student movement protesting against the financial exclusion that has been a consistent feature of marketisation of HE in the post-apartheid academy (Ndlovu 2017).

Within this context, HE managers, policymakers, academics and student leaders in South

Africa and beyond are currently engaged in what is arguably one of the most important debates in the history of the sector: the pursuit for what would be a just, equitable and sustainable student funding model. There is a need to reimagine our collective pursuit of such a model, particularly in contexts of inequality and with competing fiscal and economic and political priorities. Beyond the polarisation, we put forward that the debate about how HE funding requires us to rethink the very dynamic role played by the whole post-school education and training (PSET) sector. This special issue of the South African Journal of Higher Education offers an open, interdisciplinary and critical forum for authors from diverse contexts to contribute to this important debate.

To the extent possible, the contributions address questions such as, what should a just, equitable and sustainable student funding model look like? What models of higher education finance are currently practiced in African countries and what are their benefits and drawbacks in relation to a just and equitable higher education experience and outcomes? Against the backdrop of the socially progressive and developmental roles bestowed on universities by society and to a great extent by policymakers, what should “free” HE look like? What core tenets should guide the Global South towards a just and equitable model of funding undergraduate and postgraduate students in HE? The editors invited the submission of papers that relate to the following sub-themes:

- Higher education funding: perspectives from the Global South
- Higher education funding and the student voice
- Higher education funding and the post-pandemic university
- Modelling funding reform: what works in the context of increasing student debt?
- Means-testing, the missing middle and funding diversity
- Different conceptions of a “free” higher education

The responses, as reflected in this issue critically engage with higher education funding mechanisms and models. It highlights how HE institutions grapple with balancing their humanist nature with powerful hegemonic bureaucracies.

Ndaba (2023) engages with both these themes by linking the provision of “free” education in South Africa with the public good and arguing that the commodification of higher education undermines the public good role of higher education, and ultimately reproduces inequalities in society, and the injustices of the past South Africa.

The contribution of Wolhuter (2023), acknowledges that the global higher education

revolution boasts an enrolment explosion, opening access to higher education for many, but argues that this has taken place within the parameters of the neo-liberal economic revolution, meaning that the imperatives of social justice and equity have not been adequately responded to. He sees higher education funding as the pivot between the contextual forces of neoliberalism and the social justice imperative and, therefore, reconstructs the main tenets and context of the global higher education revolution vis-à-vis the imperatives of social justice and equity and interprets and assesses the South African case against this global canvass, suggesting a way forward for South African higher education.

Blackmur (2023) engages primarily with the first theme using the social justice framework to analyse two dominant assertions in the literature about the future contribution of the South African university system to the development of a more just society. These assessments include, firstly, the notion that South African undergraduate university students must receive state subsidies from taxpayers; and, secondly, austerity, marketisation, credentialisation, commodification, and related neoliberal conceptions of education and society have hindered efforts to achieve a more just society. Based on this analysis, he argues that a student loan system of funding the production of university qualifications is consistent with Rawlsian principles of fairness in the distribution of income and wealth.

The work of Chiramba and Ndofirepi (2023), engages critically with the first theme. They do so from the point of view of resilience. They acknowledge that some progress has been made in higher education since the advent of democracy, however, inequalities persist and the issues of access and success remain pressing concerns in higher education debates. Through the lived experiences of students from disadvantaged backgrounds, they explore the role of resilience in helping these students succeed against the odds. They also advocate that institutions of higher learning teach resilience to these students to ensure access with success in higher education.

Mokgotho (2023), using a case study to highlight the issues, reflects on the impact that the NSFAS had on skills development within two faculties at the University of Limpopo. Similarly to Chiramba and Ndofirepi (2023), he engages with the resilience of students from disadvantaged backgrounds. The findings of this paper suggest that NSFAS funding contributes to the acquisition of soft skills of beneficiaries such as financial security; spending prioritisation and collaborative budgeting; time-management skills; self-esteem and skills development opportunities, which can be seen as key elements of resilience.

Keeping in line with equitable experiences of all students and advocating for the inclusion of all, Ndlovu and Woldegiorgis (2023) look at the experience of disadvantaged students, in this case, students with disabilities. They acknowledge that within neoliberal and capitalist systems, in which education is commodified, students from disadvantaged economic

backgrounds find themselves in a precarious position in terms of student funding, resulting in limited access to education in higher education. They found that these challenges are even worse for students with disabilities because though the institutions in which their study took place had a specific funding model for these students, it was inadequate in meeting students' needs. As a result, there is continued indebtedness and exclusion of students with disabilities.

In contrast to papers in this issue that primarily look at the issue of student funding in the South African context, Jara (2023) and Oketch (2023) look at the issue of higher education funding and the theme of neoliberalism in the broader Global South context. For example, Jara (2023), asks if Chile's 2016 free education policy has the capacity to transform neoliberalism in higher education. Examining continuities and discontinuities in Chile's higher education before and after the introduction of the free education policy, Jara (2023) found mixed results. The free education policy increased public investment in the sector and reduced the costs of higher education for a limited number of students. However, the limitations of the policy were incapable of reversing the privatisation of the provision and costs dominant in the system. Instead, it created a semi-regulated market with high public subsidies and higher regulations that coexist with an open university market, with high costs, low regulation and low public support. Therefore, Jara concludes that the changes brought by the policy are relevant, but they are a limited reform of neoliberalism.

Looking at higher education financing models in sub-Saharan Africa, Oketch (2023) observes a complex interplay between cultural, political, and economic forces. He argues that the transition of higher education institutions from vibrant centres of debate to subdued institutions under authoritarian regimes, coupled with the advent of market-driven economic reforms, has redefined universities' role in Africa's society. Using the Kenyan higher education framework as a case study, Oketch (2023) finds that evidence suggests that "free" provision alone might not inherently lead to expanded access and equitable outcomes.

Bradbury (2023) and Msimango (2023) position their papers in the context of postgraduate studies. Bradbury (2023) argues that access and success have been widened in South Africa since 1994 and participation rates are more demographically representative. However, inherited funding models reward individual excellence, treating students as isolated individuals, falsely assuming supportive middle-class family networks and conceiving study years as temporal sequestration from communal responsibilities and projected future working life. Bradbury (2023) argues that these funding models are unsustainable, irrational and unethical, and premised on "cruel optimism" (Berlant, 2011) rather than the promise of radical forms of hope and presents some pragmatic possibilities for reimagining funding for postgraduate studies in South Africa. Msimango (2023) discusses technology and social media as some of the factors

that facilitate access to postgraduate studies and the funding implications thereof. She does this using what she calls the Tlou Model of Professional Identity Formation, which can be used to help undergraduate students progress to postgraduate. All of these papers help unpack the complexity of higher education funding issues in the context of historical injustices, inequalities and increasing neoliberalisation in higher education.

Masutha and Motala (2023) note that following the wave of protests by the #FeesMustFall movement and widespread calls for a free decolonised higher education, in 2017, the South African government replaced its 26 year old income-contingent student loan scheme with a grant-based free HE education policy for poor and working-class students. They present an analysis on how the policy intervention restored relative stability across the sector, and at the same time illustrated several fault lines in the student funding policy. The paper draws on a combination of qualitative policy document analysis and descriptive statistics, employing Carol Bacchi “what's the problem represented to be?” (WPR) approach to analyse recent student funding policy developments in South African HE. It makes recommendations on how South African HE policymakers can avoid the pitfalls of well-meaning HE funding policies turning into instruments for creating and reproducing the very disparities they are meant to ameliorate.

These contributions highlight the vast positions as well as the implications of existing and proposed funding models. This Special Issue also exposes a critical contemporary gap in the discussion on building equitable and sustainable higher education systems, in the Global South and elsewhere.

The editors would like to acknowledge the assistance of Dr Mthobisi Ndaba and and Dr Marcina Singh with the introduction.

REFERENCES

- Blackmur, D. J. 2023. “A social justice policy framework for funding the acquisition of higher education qualifications in South Africa.” *South African Journal of Higher Education* 37(6): 41–55.
- Boliver, V. 2017. “Misplaced optimism: How higher education reproduces rather than reduces social inequality.” *British Journal of Sociology of Education*. <https://www.tandfonline.com/doi/full/10.1080/01425692.2017.1281648>.
- Bradbury, J. 2023. “Promises, pyramids and prisms: Reimagining postgraduate funding.” *South African Journal of Higher Education* 37(6): 153–174.
- Chatterjee, A., L. Czajka, and A. Gethin. 2020. “Estimating the Distribution of Household Wealth in South Africa.” (No. hal-02876974). HAL. <https://ideas.repec.org/p/hal/wpaper/hal-02876974.html>.
- Chiramba, O. and E. S. Ndofirepi. 2023. “Access and success in higher education: Disadvantaged students’ lived experiences beyond funding hurdles at a metropolitan South African university.” *South African Journal of Higher Education* 37(6): 56–75.
- Masutha, M. and S. Motala. 2023. “Free yet? Progress, setbacks, tensions and the potential futures of South Africa’s free higher education policy: A 6 year “WPR” critical review.” *South African*

Journal of Higher Education 37(6): 193–216.

- Mokgotho, M.G., M. B. Njoko, and C. J. Burman. 2023. “Assessing the utility of the National Student Financial Aid Scheme towards skills development: A case of a rural university in South Africa.” *South African Journal of Higher Education* 37(6): 76–91.
- Msimango, S. 2023. “Opening doors to postgraduate studies: The role of digital technologies and social media.” *South African Journal of Higher Education* 37(6): 175–192.
- Ndaba, M. 2023. “When fees fall: Conceptualizing “free” higher education as a public good.” *South African Journal of Higher Education* 37(6): 8–23.
- Ndlovu, M. W. 2017. # *FeesMustFall and Youth Mobilisation in South Africa: Reform or Revolution?* Routledge.
- Ndlovu, S. and E. Woldegiorgis. 2023. “Student funding: The case of disabled students in South African higher education.” *South African Journal of Higher Education* 37(6): 92–111.
- Oketch, M. 2023. “What is the appropriate higher education finance model for Africa? Some reflections.” *South African Journal of Higher Education* 37(6): 131–152.
- Pomerantz, K. 2019. “The Story Behind TIME’s Cover on Inequality in South Africa.” *Time* 2 May. <https://time.com/5581483/time-cover-south-africa/>.
- Quinlan, K. M. 2014. “Everything for sale? The marketisation of UK higher education” by Roger Brown with Helen Carasso. *British Journal of Educational Studies* 62(2): 223–225.
- Rios-Jara, H. 2023. “The free education policy in Chile: Between transforming and maintaining neoliberalism.” *South African Journal of Higher Education* 37(6): 112–130.
- Shermer, E. T. 2021. *Indentured Students: How Government-Guaranteed Loans Left Generations Drowning in College Debt*. Harvard University Press.
- Wolhuter, C. C. 2023. “The issue of funding higher education: Global patterns compared to South African case.” *South African Journal of Higher Education* 37(6): 24–40.