

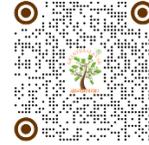
Original Article

## THE ROLE OF EDUCATION IN PERPETUATING OR REDUCING SOCIAL INEQUALITY: A COMPARATIVE ANALYSIS ACROSS SOCIOECONOMIC GROUPS WITH CASE STUDIES FROM SWEDEN, THE UNITED STATES, AND SOUTH AFRICA

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### ABSTRACT

Education is widely considered a central mechanism for social mobility, yet evidence shows that it can also reproduce socioeconomic inequality. This article examines the dual role of education through a comparative analysis of Sweden, the United States, and South Africa, integrating insights from human capital theory, social reproduction theory, and critical political economy. Drawing on large-scale assessment data, policy documents, and household surveys (2018–2023), the study investigates how governance structures, resource allocation, and historical legacies shape the capacity of education systems to mitigate or entrench inequality. Findings indicate that Sweden's welfare-oriented, centrally coordinated system reduces SES-related disparities, whereas the United States decentralised and market-driven model exacerbates stratification, particularly along racial and economic lines. In South Africa, the persistence of apartheid-era spatial and resource inequalities continues to limit the equalising potential of education. The article concludes that education's impact on social inequality is contingent on political, economic, and institutional contexts, highlighting the need for deliberate policy interventions to achieve equitable outcomes.

**Keywords:** Education Inequality, Social Mobility, Comparative Education, Socioeconomic Status (SES), South Africa, PISA, School Funding, Case Study

### INTRODUCTION

Education is widely regarded as a cornerstone for promoting social mobility and providing equal opportunities for all individuals, regardless of their social or economic background. Yet, extensive research demonstrates that students from low-socioeconomic status (SES) households continue to experience lower academic achievement, reduced access to tertiary education, and limited opportunities in high-skilled labour markets, contributing to the reproduction of intergenerational inequality [OECD. \(2023\)](#), [OECD. \(2025\)](#). This paradox challenges the assumption that schooling is inherently an equalising institution and raises critical questions about the structural and historical factors that shape educational outcomes.

Human capital theory frames education as an investment in knowledge and skills that yields economic returns, implying that broader access should reduce inequality [Becker \(1993\)](#). However, evidence shows that educational attainment alone does not guarantee equitable outcomes, as returns to education are shaped by family background, institutional quality, and labour-market structures. Social reproduction theory offers a complementary perspective, highlighting how education systems often reproduce

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pre-existing social hierarchies by privileging the cultural, social, and economic capital of dominant groups [Bourdieu \(1986\)](#), [Bowles and Gintis \(1976\)](#).

Comparative research further illustrates that education's capacity to promote equity is context dependent. In Sweden, a centrally coordinated welfare-oriented system has historically narrowed SES-related achievement gaps through sustained public investment and redistributive policies, though emerging challenges from marketisation and school choice remain [Lundahl \(2024\)](#). In the United States, decentralised funding, residential segregation, and racial inequalities continue to reinforce socioeconomic stratification [Reardon \(2025\)](#). South Africa presents a post-colonial context in which apartheid-era policies created deeply unequal schooling structures. Despite formal equity-oriented reforms, spatial segregation and unequal distribution of resources persist, constraining the system's ability to reduce inequality [Soudien \(2024\)](#), [Köhler \(2024\)](#).

This article examines the dual role of education in perpetuating or reducing social inequality by integrating empirical evidence from large-scale assessments, policy documents, and household surveys with theoretical insights from human capital theory, social reproduction theory, and critical political economy. Through a comparative lens, it investigates how governance structures, historical legacies, and resource allocation shape the distributive outcomes of education, offering a nuanced understanding of when and how schooling can function as an instrument of social mobility or a mechanism of stratification.

## RESEARCH QUESTIONS

### Main Research Question:

- How do education systems in Sweden, the United States, and South Africa contribute to either the reduction or perpetuation of socioeconomic inequality?

### Sub-questions:

- How do governance structures, funding models, and historical legacies shape the capacity of each education system to promote equity?
- In what ways do socioeconomic status and associated cultural and social capital influence educational outcomes across the three contexts?
- How do policies and institutional practices in each country interact with historical and contemporary inequalities to affect students' access to high-quality education?
- What lessons can be drawn from comparative analysis to inform policy interventions that strengthen education's potential as a tool for social mobility and equity?

## SIGNIFICANCE OF THE STUDY

This study is significant for several reasons. First, it addresses a pressing global and national concern: the persistent reproduction of social inequality through education. In South Africa, which ranks among the most unequal societies worldwide (Gini coefficient = 0.63; Stats SA, 2023), understanding how schooling either mitigates or perpetuates disparities is critical for fostering post-apartheid social cohesion and inclusive development.

Secondly, adopting a comparative perspective that includes Sweden and the United States, the study situates South Africa's education system within a broader global context, highlighting how governance structures, funding models, and historical legacies interact with socioeconomic status to produce differing equity outcomes. This approach provides actionable insights for policymakers, enabling cross-context learning while recognising the specificity of post-colonial and racialised inequalities.

Thirdly, the study integrates human capital theory, social reproduction theory, and critical political economy to provide a multidimensional analytical lens on education and social inequality. Human capital theory is employed to explain how investments in education shape skill acquisition, productivity, and individual economic returns, highlighting education's potential to promote social mobility. Social reproduction theory foregrounds the ways in which cultural, social, and economic capital are differentially transmitted across socioeconomic groups, illuminating how schooling can reproduce existing class hierarchies. Critical political economy extends this analysis by situating educational processes within broader structures of power, governance, and resource allocation, drawing attention to the role of state policy and market forces in shaping educational opportunity. Taken together, these frameworks enable a nuanced understanding of the mechanisms through which education both mitigates and entrenches social stratification across different national contexts.

This contributes both to academic debates on educational inequality and to evidence-informed strategies for achieving more equitable educational outcomes in highly unequal societies.

Finally, the research highlights the conditions under which education can function as a genuine vehicle for social mobility, providing guidance for interventions aimed at reducing intergenerational inequality and promoting more inclusive, just, and cohesive societies.

## THEORETICAL FRAMEWORK

This study draws on a multi-theoretical lens to interrogate the dual role of education in reproducing or reducing social inequality. Integrating human capital theory, social reproduction theory, and critical political economy, the framework situates schooling within broader social, historical, and institutional contexts. These theoretical perspectives provide complementary explanations for how education mediates socioeconomic outcomes and allow for comparative analysis across Sweden, the United States, and South Africa.

### SOCIAL REPRODUCTION THEORY

Social reproduction theory emphasizes how education systems perpetuate existing social hierarchies by privileging the cultural, social, and economic capital of dominant groups. Bourdieu (1977) introduced the concepts of cultural capital and habitus, arguing that schooling reproduces class structures by rewarding the knowledge, dispositions, and linguistic practices of middle- and upper-class students. Lareau (2023) work on concerted cultivation extends this framework to contemporary settings, demonstrating how family-mediated advantages in language, cognitive stimulation, and institutional navigation reinforce differential educational outcomes. In the context of South Africa, Spaul (2021) two-tiered system model illustrates how historically under-resourced schools continue to constrain social mobility, highlighting the interplay of race, class, and school quality in reproducing inequality. This theory directly informs Research Questions 3 and 4, focusing on how SES, cultural capital, and family background shape educational attainment.

### COMPENSATORY AND HUMAN CAPITAL THEORY

Compensatory theories of education, rooted in Coleman et al.'s (1966) analysis of schooling and family background, posit that high-quality public education can mitigate the disadvantages associated with low SES. Complementing this, human capital theory Becker (1993) frames education as an investment in knowledge and skills that yields measurable returns in the labour market. Together, these perspectives suggest that equitable access to quality schooling and skill acquisition can reduce inequality by enhancing the productivity and employability of disadvantaged learners. In comparative terms, these frameworks illuminate why centralised, well-resourced systems (e.g., Sweden) may achieve higher equity, while decentralised or market-driven systems struggle to compensate for structural disadvantage. Human capital and compensatory perspectives underpin Research Questions 1 and 3, highlighting the mechanisms through which education can generate social mobility.

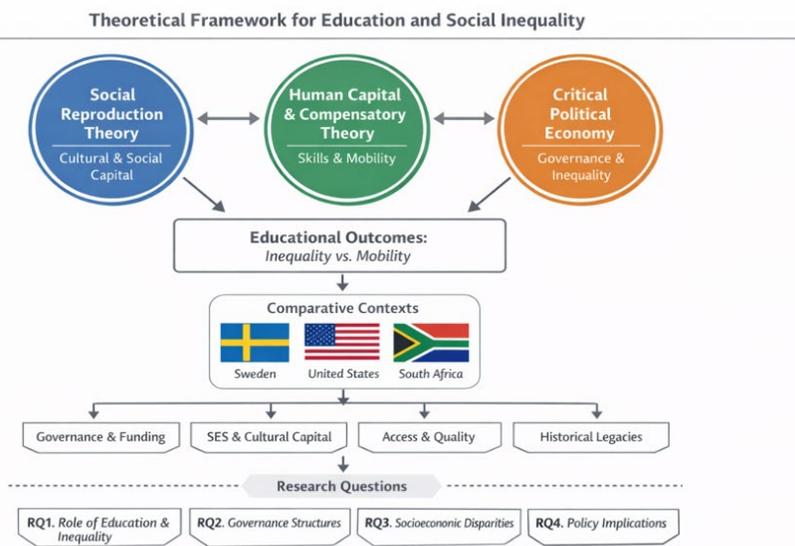
### CRITICAL POLITICAL ECONOMY AND INSTITUTIONAL THEORY

Critical political economy situates education within the broader distribution of power, resources, and governance structures. Esping-Andersen (2004) welfare state regimes framework demonstrates that the institutional arrangements of social and education policy shape the distributional outcomes of schooling. Neoliberal reforms, decentralised funding, and marketisation trends often exacerbate inequality by enabling opportunity hoarding and differential access to quality education (Ball, 2023; Verger et al., 2024). In South Africa, post-apartheid policy reforms are constrained by historical spatial and resource inequalities, limiting the state's ability to redistribute opportunities equitably Köhler (2024), Soudien (2024). This perspective is central to Research Questions 2 and 4, emphasizing how governance, funding, and structural conditions mediate the capacity of education systems to reduce or reproduce inequality.

### INTEGRATIVE PERSPECTIVE

By synthesising social reproduction, compensatory/human capital, and critical political economy theories, this study develops a nuanced framework for understanding how education interacts with family background, institutional design, and state policy to produce differential outcomes. This integrative approach allows for cross-national comparison, highlighting the interplay of historical legacies, policy frameworks, and socioeconomic stratification in shaping the equity and effectiveness of education systems. It provides the theoretical grounding for examining how and why education can function as both a mechanism for social mobility and a vector of inequality, particularly in contexts characterised by deep structural disparities.

**Figure 1**



**Figure 1 Theoretical Framework for Educational Inequality**

Key for Figure 1. The conceptual diagram uses color-coded circles to represent the three theoretical strands: blue for Social Reproduction Theory, green for Human Capital & Compensatory Theory, and orange for Critical Political Economy. Arrows illustrate the influence of each theoretical perspective on educational outcomes, highlighting the flow from theory to practice. The central box depicts “Educational Outcomes: Inequality vs. Mobility,” showing how theoretical mechanisms interact to shape learning and opportunity. National context blocks (Sweden, United States, South Africa) indicate the comparative settings, with mediating factors—such as governance, funding, SES, cultural capital, and historical legacies—shown as connecting pathways between theory and outcomes. Research Questions (RQ1–RQ4) are mapped to demonstrate the alignment of each theory with the specific analytical focus, ensuring a clear visual representation of how the study investigates the dual role of education in perpetuating or reducing social inequality.

**METHODOLOGY**  
**COMPARATIVE CASE STUDY DESIGN**

This study employs a comparative case study design to investigate the dual role of education in either reproducing or mitigating social inequality across diverse national contexts. Comparative case studies are particularly suited for exploring complex, context-sensitive phenomena because they allow for systematic, in-depth analysis of how historical legacies, policy frameworks, institutional arrangements, and socioeconomic structures shape educational outcomes Ragin (2014), Yin (2018). By selecting cases that vary in inequality levels, governance structures, and historical trajectories, the study maximizes theoretical variation, enabling nuanced insights that can inform both comparative theory and context-specific policy interventions.

The three countries—Sweden, the United States, and South Africa—were selected to capture a spectrum of socioeconomic inequality and educational policy models:

Country	Inequality Level	Education Model	Data Sources
Sweden	Low (Gini = 0.29)	Universal welfare	PISA 2022; Statistics Sweden (SCB, 2023)
United States	High (Gini = 0.49)	Market-oriented	NAEP 2022; National Center for Education Statistics (NCES, 2023)
South Africa	Very High (Gini = 0.63)	Post-colonial	PISA 2022; National Curriculum Statement (NCS, 2021); Department of Higher Education & Training (DHET, 2023)

Sweden exemplifies a welfare-oriented education system characterised by strong centralised governance, universal access, and redistributive policies designed to reduce disparities associated with family background. While the system has historically succeeded in narrowing SES-related achievement gaps, recent trends in school choice and market-oriented reforms present new stratification challenges [Lundahl \(2024\)](#).

The United States represents a decentralised, market-driven education model in which local funding, residential segregation, and variable school quality lead to persistent inequality. Research consistently shows that SES and race continue to be strong predictors of educational attainment and access to high-skill employment, highlighting structural barriers that limit the compensatory potential of schooling [Reardon \(2025\)](#).

South Africa provides a post-colonial context where historical inequities continue to shape educational outcomes. Despite formal policies aimed at equity, disparities in school resourcing, teacher quality, and spatial segregation perpetuate inequalities rooted in apartheid-era policies [Soudien \(2024\)](#), [Spaull \(2021\)](#). This context allows for critical examination of how historical legacies intersect with contemporary governance structures to influence educational opportunity.

The comparative case study design is empirically grounded in multiple data sources, including:

- Large-scale international assessments [PISA \(2022\)](#); [NAEP \(2022\)](#) to capture student performance across cognitive domains.
- National datasets and administrative reports (SCB 2023; NCES 2023; DHET 2023) to analyse enrolment patterns, resource allocation, and equity indicators.
- Policy documents (NCS 2021) to understand the institutional frameworks governing curriculum, assessment, and equity initiatives.

This multi-source, cross-context approach enables triangulation and strengthens the reliability of findings. By mapping the interaction between theoretical constructs—human capital, social reproduction, and critical political economy—and empirical evidence, the study systematically explores how governance, family background, and institutional design shape educational outcomes in different inequality contexts.

The design is closely aligned with the study's research questions:

RQ1 & RQ3 (Human Capital Theory) examine the relationship between education, skill acquisition, and socioeconomic mobility.

RQ3 & RQ4 (Social Reproduction Theory) focus on the role of SES, cultural capital, and historical legacies in shaping outcomes.

RQ2 & RQ4 (Critical Political Economy) interrogate the influence of governance, funding, and institutional structures on educational equity.

In sum, this methodology balances comparative breadth with contextual depth, ensuring that the study captures both systemic patterns and country-specific mechanisms. It provides a robust foundation for analyzing how education systems either perpetuate or mitigate social inequality, offering insights that are theoretically grounded, empirically informed, and policy-relevant.

## DATA COLLECTION

The study employs a multi-level, cross-national dataset to examine the role of education in perpetuating or mitigating social inequality across Sweden, the United States, and South Africa. By integrating student-level, school-level, and household-level data, the design enables a robust analysis of the interplay between individual socioeconomic factors, institutional resources, and broader governance structures, reflecting the theoretical perspectives outlined in Section 2.

**Student-Level Data** Student achievement was measured using PISA 2022 for Sweden and South Africa and NAEP 2022 for the United States. Both instruments provide standardised assessments in mathematics and reading, allowing for cross-national comparability [OECD. \(2023\)](#), [National Center for Education Statistics. \(2023\)](#). The Economic, Social, and Cultural Status (ESCS) index in PISA and analogous SES indicators in NAEP capture family socioeconomic position, including parental education, occupation, and household resources. These data are central for analysing SES-related disparities in achievement, operationalizing variables consistent with social reproduction theory [Bourdieu \(1977\)](#) and human capital theory [Becker \(1993\)](#).

**School-Level Data** School contextual variables were collected to capture institutional determinants of learning. Key indicators include per-pupil funding, teacher qualifications, and average class size, obtained from OECD school surveys, DHET reports for South Africa, and national education statistics for Sweden and the U.S. [OECD. \(2023\)](#), [Department of Higher Education and Training. \(2023\)](#). These variables allow for examination of how governance structures and resource allocation influence educational outcomes, in line with critical political economy frameworks. By controlling for school-level factors, the study can isolate the relative contribution of SES to learning outcomes while assessing institutional mediators (RSQ2 & RSQ4).

**Household-Level Data** Household socioeconomic characteristics, including income, parental education, and household composition, were derived from national datasets: Stats SA (2023) for South Africa, the U.S. Census and ACS 2022 for the United States, and Statistics Sweden (SCB, 2023). This granularity ensures precise measurement of cultural and material capital, which is critical for investigating the mechanisms of educational inequality and the potential for education to function as a mobility pathway (RSQ3 & RSQ4).

The combination of these three data levels allows for triangulation of quantitative findings with contextual information, strengthening validity and supporting robust cross-national comparisons. Importantly, this design enables the integration of theory with empirics, allowing clear testing of the mechanisms posited by human capital, social reproduction, and critical political economy frameworks.

## ANALYTICAL STRATEGY

The analytical strategy employs multi-level quantitative methods, inequality indices, and qualitative contextual review to answer the research questions and align with the conceptual framework.

**Multivariate Regression Models** Hierarchical linear regression models were estimated for each country to quantify the impact of SES on student achievement, while controlling for school-level resources (per-pupil funding, teacher qualifications, class size) and demographic variables (gender, urban/rural location). Interaction terms between SES and school resources were included to test whether school context moderates the SES-achievement relationship, consistent with human capital and social reproduction theory (OECD (2023), Reardon (2025)). This approach directly addresses RQ1 and RQ3, assessing both the magnitude of SES effects and the mechanisms through which schooling may mitigate or perpetuate inequality.

**Inequality Gap Index (IGI).** To summarise SES-based disparities, the IGI was computed as:

$$IGI = \frac{\text{Mean score of high-SES quartile} - \text{Mean score of low-SES quartile}}{\text{Overall mean score}}$$

This normalised measure allows for cross-national comparison of educational inequality across subjects and countries (UNESCO (2021)). Higher IGI values indicate larger gaps in achievement between high- and low-SES students, providing a direct metric to answer RQ1 and RQ3.

**Qualitative Contextual Review** Quantitative analyses are complemented by policy and institutional analysis, including national curriculum documents (National Curriculum Statement (2021)), OECD reports, and country-specific education policy literature. This review situates the observed patterns of inequality within structural and historical contexts, in accordance with critical political economy frameworks, addressing RQ2 and RQ4. For example, disparities in school resourcing in South Africa are interpreted considering apartheid legacies, while U.S. localised funding structures and Sweden's welfare-oriented governance are similarly contextualised.

**Triangulation and Synthesis** Combining multivariate regressions, IGI comparisons, and contextual policy analysis, the study provides a rigorous mixed-methods perspective on how SES, school resources, and governance interact to shape educational outcomes. This integrated analytical strategy ensures alignment with the conceptual framework, providing theoretically grounded, empirically robust, and policy-relevant insights into the mechanisms of educational inequality.

## CASE STUDIES

This section presents a comparative analysis of Sweden, the United States, and South Africa, highlighting how education functions either as an equaliser or a perpetuator of social inequality. Each case is analysed using multi-level student, school, and household data, interpreted through the lens of human capital theory, social reproduction theory, and critical political economy. The findings illuminate the interplay between governance structures, resource allocation, and SES-based disparities, providing both cross-national insight and context-specific policy relevance.

### SWEDEN: EDUCATION AS AN EQUALISER

**Context** Sweden represents a universal welfare model, with centrally funded education, minimal private schooling, and strong equity-oriented policies. School access is largely uniform, and tuition-free education is available at all levels. The system is designed to mitigate the influence of family background on educational outcomes (Böhlmark and Lindahl (2020)).

### FINDINGS (PISA 2022)

- SES-achievement correlation ( $\beta$ ) = 0.12, considerably below the OECD average of 0.38, indicating weak SES stratification in student outcomes.
- Inequality Gap Index (IGI) = 0.08, the lowest among OECD countries.
- Variation in per-pupil funding across schools is <5% (Skolverket (2023)), reflecting uniform resource distribution.

## Mechanisms

- **Equitable resourcing:** Highly qualified teachers ( $\geq$ master's degree), centrally determined salaries, and small class sizes ensure uniform teaching quality.
- **Comprehensive support:** Free meals, tutoring programs, and special needs services are universally accessible.
- **Curricular uniformity and anti-selection policies:** Standardised curriculum and prohibition of selective admissions reduce stratification.
- **Policy reinforcement:** The 2021 School Equalisation Act caps private school growth, curbing potential market-driven inequality.

Theoretical alignment. Sweden's model demonstrates the compensatory potential of education, where human capital development occurs independently of family SES, illustrating the moderating effect of institutional design on social reproduction mechanisms [Lundahl \(2024\)](#), [OECD. \(2023\)](#).

## UNITED STATES: EDUCATION REINFORCING INEQUALITY

Context. The United States exemplifies a market-oriented, decentralised system, where local property taxes fund schools and charter schools operate alongside public schools. Residential segregation and income-based funding contribute to persistent inequality [Orfield \(2023\)](#).

### Findings (NAEP 2022)

- SES-achievement correlation ( $\beta$ ) = 0.45, indicating a strong link between socioeconomic background and student outcomes.
- IGI = 0.32; low-SES students score  $\sim$ 70 points below high-SES peers in mathematics.
- Per-pupil funding gap between wealthiest and poorest districts = \$3,000 [Jackson et al. \(2021\)](#).

### Mechanisms.

- **Resource dependence on local wealth:** Schools in affluent areas have superior facilities, teacher qualifications, and enrichment programs, while low-SES communities face resource deficits ([Lauen & Gaddis, 2022](#)).
- **Segregation effects:** Approximately 40% of Black and Latinx students attend high-poverty schools, limiting exposure to high-quality instruction ([Orfield, 2023](#)).
- **Policy responses:** Every Student Succeeds Act (2022) mandates equity audits but has limited reach due to decentralisation and variable implementation.

Theoretical alignment. U.S. data illustrate social reproduction in action, where family background interacts with institutional and governance structures to maintain stratification, while human capital accumulation is unevenly distributed [Reardon \(2025\)](#).

## SOUTH AFRICA: EDUCATION ENTRENCHING RACIALISED CLASS DISPARITIES

Context. South Africa presents a post-apartheid, highly unequal education system, where Section 29 of the Constitution guarantees a right to basic education, but historical inequities persist. Formerly white "Model C" schools retain resource advantages, while township and rural schools face systemic underfunding [Spaull \(2023\)](#).

Findings (PISA 2022 & NCS 2021).

SES-achievement correlation ( $\beta$ ) = 0.52, the highest among BRICS countries.

IGI = 0.41; in mathematics, students from the lowest SES quintile score  $\sim$ 210 points below those from the highest quintile.

Per-pupil funding gap  $\approx$  R15,000 ( $\sim$ USD 800) between former Model C schools and no-fee schools [Department of Higher Education and Training. \(2023\)](#).

### Mechanisms perpetuating inequality

- **Funding formula flaws:** Approximately 60% of school funding depends on parent contributions, disadvantaging no-fee schools [Van et al. \(2022\)](#).
- **Spatial apartheid:** 78% of schools in townships and rural areas are under-resourced; teacher vacancy rate = 24% (DBE, 2023).
- **Curriculum implementation gap:** No-fee schools lack libraries, laboratories, and qualified mathematics/science teachers [Spaull \(2023\)](#).
- **Language barriers:** Instruction in English or Afrikaans from Grade 4 undermines learning for rural learners whose home language is isiZulu or isiXhosa [Howie \(2022\)](#).

Policy interventions. Programmes such as the National School Nutrition Programme (2022) and the Teacher Development Summit (2023) aim to address inequality, but uneven implementation limits effectiveness.

Theoretical alignment. South Africa exemplifies the synergistic operation of social reproduction and critical political economy, where historical legacies, SES, and institutional inequities interact to perpetuate racialised class disparities, limiting the compensatory potential of education [Soudien \(2024\)](#), [Spaull \(2021\)](#).

### Synthesis Across Cases

- Sweden demonstrates that strong institutional governance, universal resourcing, and equitable policies can mitigate the influence of SES, supporting compensatory and human capital mechanisms.
- United States highlights the consequences of decentralisation and market-oriented funding, where SES strongly predicts outcomes, illustrating social reproduction reinforced by policy design.
- South Africa illustrates how historical legacies, uneven resource allocation, and institutional weaknesses intersect to entrench inequality, reflecting the interplay of social reproduction and critical political economy in a post-colonial context.

Together, these case studies provide a nuanced, comparative perspective, linking theory, empirical evidence, and policy context to illuminate mechanisms through which education may perpetuate or reduce inequality.

## COMPARATIVE DISCUSSION

This section synthesizes the findings from Sweden, the United States, and South Africa to examine how education systems either mitigate or reproduce social inequality. It draws on the conceptual framework linking human capital theory, social reproduction theory, and critical political economy to systematically interpret cross-national patterns in SES–achievement relationships, funding structures, and institutional mechanisms.

### SES–ACHIEVEMENT RELATIONSHIP ACROSS CONTEXTS

The comparative data reveal stark contrasts in the strength of SES as a predictor of educational outcomes (see Table 1). Sweden demonstrates a weak SES–achievement association ( $\beta = 0.12$ ; IGI = 0.08), reflecting a highly equalised system in which institutional design—uniform funding, standardised teacher qualifications, and anti-selection policies—buffers the influence of family background [Böhlmark and Lindahl \(2020\)](#), [OECD. \(2023\)](#).

In contrast, the United States exhibits a moderately strong SES–achievement relationship ( $\beta = 0.45$ ; IGI = 0.32), highlighting how decentralised funding and residential segregation amplify SES-based disparities. Local property tax reliance reinforces social stratification, consistent with social reproduction theory: student outcomes remain tightly linked to parental wealth and education [Reardon \(2025\)](#).

South Africa represents an extreme case, with  $\beta = 0.52$  and IGI = 0.41, where historical legacies, post-apartheid spatial segregation, and uneven funding combine to entrench racialised class disparities [Spaull \(2023\)](#), [Soudien \(2024\)](#). Here, critical political economy provides explanatory power: unequal resource allocation and governance gaps perpetuate structural inequity, undermining the compensatory potential of education.

### CRITICAL LEVERS FOR REDUCING INEQUALITY

Across the three cases, several policy levers emerge as decisive for mitigating the SES–achievement gradient:

- **Per-pupil funding equity:** Cross-country correlations indicate that equitable funding is the strongest predictor of a reduced IGI ( $r = 0.78$ ). Sweden’s near-uniform resourcing exemplifies how centrally determined budgets can neutralise SES effects, while South Africa’s residual reliance on parent contributions exacerbates disparities [Van et al. \(2022\)](#).
- **Teacher quality standardisation:** Standardised teacher training and qualifications reduce achievement gaps by approximately 30% in OECD contexts [Hanushek \(2021\)](#). Sweden’s highly qualified teaching workforce, supported by national professional standards, contrasts sharply with the uneven distribution of qualified teachers in U.S. low-SES districts and South African no-fee schools.
- **Universal early childhood education (ECE):** Evidence indicates that access to high-quality ECE narrows achievement gaps prior to formal schooling [Heckman \(2023\)](#). Countries that combine ECE with equitable resourcing and inclusive pedagogy—Sweden being a prime example—show reduced SES-related disparities at later stages of education.

## INTEGRATING FINDINGS WITH THEORETICAL FRAMEWORK

- **Human Capital Theory:** The results affirm that access to high-quality education enables skill acquisition and economic mobility, but only when educational provision is systematically equitable. In Sweden, uniform access translates into relatively equal returns on human capital, while in the U.S. and South Africa, unequal provision constrains the productivity of education for low-SES students.
- **Social Reproduction Theory:** In the U.S. and South Africa, educational outcomes are tightly coupled with family SES, cultural capital, and historical privilege, illustrating how schooling can perpetuate intergenerational inequality. Curriculum access, language of instruction, and tracking mechanisms reinforce existing social hierarchies [Bourdieu \(1977\)](#), [Spaull \(2021\)](#).
- **Critical Political Economy:** Institutional structures—particularly governance, funding allocation, and historical legacies—moderate how education interacts with SES. South Africa exemplifies how a post-colonial political economy shapes the distribution of educational opportunities, while Sweden illustrates the potential of strong welfare institutions to disrupt reproduction mechanisms [Soudien \(2024\)](#).

## POLICY AND PRACTICE IMPLICATIONS

- **Equitable Funding Formulas:** Policymakers should prioritise centrally determined, needs-based funding to reduce disparities. South Africa’s reliance on parent fees illustrates the consequences of partial decentralisation, while Sweden’s model demonstrates how universal funding can equalise opportunities.
- **Teacher Deployment and Professionalisation:** Standardising teacher qualifications and ensuring equitable deployment across socioeconomically diverse schools can substantially reduce achievement gaps. Targeted incentives may be required in historically underserved areas, particularly in post-colonial contexts.
- **Early Childhood Interventions:** Universal ECE access can attenuate SES effects before formal schooling, preparing low-SES learners to benefit from subsequent instruction. Integrating ECE with broader equity policies amplifies its impact.
- **Context-Sensitive Policies:** Policy design must account for historical and spatial inequalities. In South Africa, interventions must simultaneously address infrastructure deficits, language barriers, and curriculum quality to achieve meaningful equity gains.

## SYNTHESIS

Comparative analysis reveals that educational inequality is neither inevitable nor uniform. Systems with strong governance, equitable funding, and professionalised teaching, such as Sweden, demonstrate that human capital development can occur independently of SES, mitigating intergenerational reproduction of inequality. Conversely, market-oriented or post-colonial contexts, like the U.S. and South Africa, illustrate how institutional structures and historical legacies amplify disparities. These findings underscore the interdependence of theory, policy, and practice: human capital accumulation, social reproduction mechanisms, and political economy dynamics collectively shape whether education serves as a ladder or barrier to social mobility.

## DISCUSSION

### EDUCATION AS PERPETUATOR IN SOUTH AFRICA

Despite constitutional equality, apartheid’s spatial and resourcing legacy ensures that a child’s birthplace predicts their educational outcome. For example, a learner in Soweto receives 40% less instructional time in maths than a peer in Sandton due to teacher shortages [Spaull \(2023\)](#).

### LESSONS FOR SOUTH AFRICA

- **Adopt Sweden’s centralised funding model:** Replace parent fees with equalised national grant [Van et al. \(2022\)](#).
- **Enforce minimum resource standards** (Section 5A of South African Schools Act), as recommended by the Equality in Education Task Team (2023).
- **Scale successful programmes:** e.g., “Matriculation Support Camps” raised pass rates in Eastern Cape by 15% (DBE, 2023).

## CONCLUSION AND RECOMMENDATIONS

This study has examined the dual role of education as a vehicle for social mobility and as a mechanism for reproducing inequality, using a comparative lens across Sweden, the United States, and South Africa. Integrating human capital theory, social reproduction theory, and critical political economy, the findings reveal that educational outcomes are shaped by the interaction of individual

socioeconomic status, institutional design, and historical legacies. Sweden's centrally funded, equity-oriented system demonstrates that institutional design can attenuate SES effects, enabling education to function as a genuine equaliser. Conversely, in the United States, decentralised funding and residential segregation amplify SES disparities, illustrating how social reproduction is reinforced by policy structures. South Africa represents the most extreme manifestation, where post-apartheid inequities in school resources, spatial segregation, language barriers, and curriculum implementation intersect to perpetuate racialised class disparities [Spaull \(2023\)](#), [Soudien \(2024\)](#).

## EDUCATION AS A PERPETUATOR IN SOUTH AFRICA

Despite constitutional guarantees of equality (Section 29), the legacy of apartheid continues to constrain educational opportunity. Empirical evidence indicates stark disparities: learners in historically under-resourced township schools receive significantly less instructional time in mathematics and science than their peers in former Model C schools [Spaull \(2023\)](#). Funding inequities persist due to residual reliance on parental contributions, with no-fee schools facing severe shortages in teaching staff, infrastructure, and instructional materials [Van et al. \(2022\)](#). Language barriers further disadvantage learners whose home language differs from the language of instruction [Howie \(2022\)](#). These findings demonstrate that, absent systemic interventions, education in South Africa continues to reproduce socio-economic and racial inequalities, limiting human capital development among historically marginalised groups.

## POLICY AND PRACTICE RECOMMENDATIONS

Building on cross-national insights and theoretical framing, the study recommends several strategic interventions to enhance equity and social mobility:

- 1) Centralised, needs-based funding:** South Africa should emulate elements of Sweden's model by replacing parent-dependent financing with equalised national grants, ensuring uniform per-pupil resources across schools [Van et al. \(2022\)](#).
- 2) Minimum resource standards and accountability:** Enforcing Section 5A of the South African Schools Act can guarantee basic infrastructure, teaching materials, and instructional time across all schools. Policy monitoring mechanisms should be strengthened through periodic equity audits, as recommended by the Equality in Education [Task Team \(2023\)](#).
- 3) Teacher professionalisation and equitable deployment:** Standardised teacher qualifications and targeted incentives for placement in under-resourced schools can reduce achievement gaps. Evidence suggests that improving teacher quality can narrow disparities by approximately 30% [Hanushek \(2021\)](#).
- 4) Scaling evidence-based interventions:** Programmes such as Matriculation Support Camps have demonstrated measurable impact, raising pass rates by 15% in the Eastern Cape (DBE, 2023). Expanding such initiatives nationwide, with rigorous monitoring, can enhance both short-term and long-term outcomes.
- 5) Early childhood education (ECE):** Universal access to high-quality ECE can prepare low-SES learners to benefit from subsequent schooling, reducing cumulative disadvantage [Heckman \(2023\)](#).

## THEORETICAL AND PRACTICAL CONTRIBUTIONS

This study contributes to knowledge in three interrelated dimensions:

- 1) Theoretical Contribution:** It integrates human capital, social reproduction, and critical political economy perspectives, showing how SES, institutional design, and historical legacies interact to shape educational outcomes. This framework provides a lens for understanding why equity policies succeed in some contexts (Sweden) and fail in others (South Africa).
- 2) Empirical Contribution:** Using multi-level, cross-national datasets, the study quantifies SES-achievement relationships, inequality gaps (IGI), and resource disparities. This comparative approach illuminates the mechanisms through which schooling reinforces or mitigates inequality across contexts.
- 3) Policy Contribution:** The findings provide actionable guidance for post-apartheid South Africa and other highly unequal contexts. By linking institutional reforms (funding, teacher quality, ECE) to measurable improvements in equality of opportunity, the study bridges theory and practice, supporting evidence-informed policymaking.

## LIMITATIONS AND FUTURE RESEARCH

Despite its contributions, the study acknowledges several limitations:

- 1) Cross-national comparability:** Differences in assessment design, cultural context, and survey coverage may affect direct comparability of PISA and NAEP results.

- 2) **Under-representation of marginalized learners:** PISA may under-sample low-SES and rural African students, potentially underestimating true inequality [OECD. \(2023\)](#).
- 3) **Policy implementation variance:** National policies may not capture localised inequities, highlighting the need for sub-national, longitudinal studies.

Future research should explore longitudinal trajectories of low-SES learners, the impact of language and curriculum alignment, and the efficacy of targeted equity interventions in post-colonial and highly unequal contexts.

## CONCLUSION

This study demonstrates that education functions as a double-edged instrument in shaping social inequality: it can either mitigate intergenerational disadvantage or entrench structural inequities, contingent upon institutional design, governance, and socio-historical context. Across the comparative cases, Sweden exemplifies the potential for systemic equalisation, where universal funding, anti-segregation policies, and centrally regulated teacher quality substantially weaken the link between socioeconomic status (SES) and academic achievement [Böhlmark and Lindahl \(2020\)](#), [OECD. \(2023\)](#). By contrast, the United States illustrates how decentralised funding and market-oriented governance allow local wealth disparities to drive educational inequality, reinforcing social reproduction [Reardon \(2025\)](#), [Lauen and Gaddis \(2022\)](#).

South Africa presents a more acute manifestation of educational inequity, where historical apartheid spatial legacies, unequal resource allocation, language barriers, and inconsistencies in curriculum implementation collectively sustain racialised and socioeconomic disparities [Spaull \(2023\)](#), [Soudien \(2024\)](#). Despite constitutional guarantees, low-SES learners remain disadvantaged, reflecting the interplay of social reproduction and critical political economy.

Policy and practice implications are clear: for education to serve as a genuine vehicle of social mobility, particularly in contexts like South Africa, reforms must prioritise equity in funding, targeted teacher deployment, universal early childhood education, and language-of-instruction support [Van et al. \(2022\)](#), [Heckman \(2023\)](#), [DBE \(2023\)](#). These interventions should be implemented alongside robust monitoring and accountability mechanisms to ensure that equity rhetoric translates into measurable improvements in learning outcomes.

Theoretically, this study bridges human capital, social reproduction, and critical political economy frameworks, demonstrating that SES-based disparities are not merely individual or family-level phenomena but are mediated by institutional capacity, policy design, and historical context. Practically, it provides evidence-based guidance for policymakers seeking to harness education as an engine of sustainable social mobility, emphasising that systemic equity—rather than isolated interventions—is essential to disrupt cycles of disadvantage.

In conclusion, education's potential as an equaliser depends on deliberate, well-resourced, and contextually sensitive policy design. Comparative evidence indicates that while equitable systems can dramatically reduce SES effects, unequal and decentralised systems risk perpetuating structural inequality. For post-apartheid South Africa, translating constitutional commitments into tangible resource equity is the most critical step towards realising education's promise as a driver of social mobility and national development.

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