



Chapter 9

Education and Inequality

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Introduction

South Africa is known as one of the countries with the most income inequality globally.¹ South Africa's inequality can be attributed to an intriguing relationship between inequalities in access to education, health, income, employment, and living conditions, where many citizens are living in poverty. The decline in South Africa's economic wellbeing is evident from the ever-increasing unemployment rate, lower living standards, rising poverty levels, inequality, and a sense of hopelessness. This chapter reflects on the opportunity of access to quality education in South Africa and its relevance to inequality.

South Africa's economic growth rate varied between a low of -1.5% per annum in 2009 (after the subprime crisis) and a high of 5.6% in 2006. An average economic growth rate of 2.98% was recorded for South Africa from 1994 to 2015, with a continuing downward trend until 2022. Unemployment has, since 1994, increased from 20% (1994) to 25.3% (2015) and 29.2% (2020),² indicating an upward trend (see Figure 1).

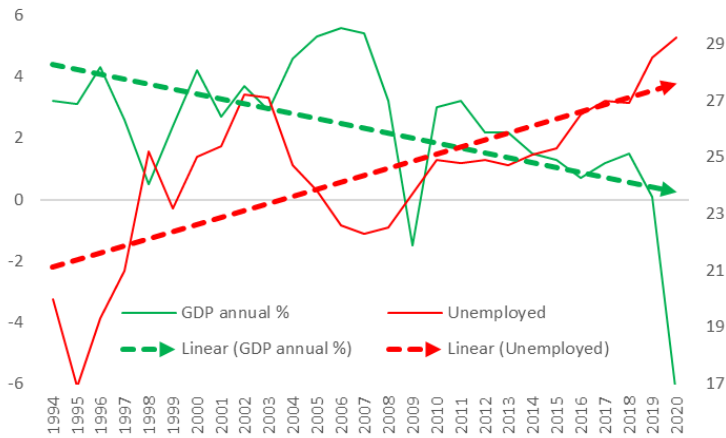


Fig 1 Economic growth (percentage change in GDP) and the unemployment rate

Figure 1 shows South Africa has recorded an official unemployment rate above 20% for the past 20 years.

In preparing for the 4th Industrial Revolution (4IR) and moving to a post-industrialised phase, South Africa must be prepared to create employment in an environment with even higher levels of technology. Unemployment in SA is attributed to the country's high levels of unskilled workers. In 2022, half of unemployed individuals in South Africa had an education level below matric (Grade 12). The split of the unemployed (when education levels are utilised to categorise the total unemployment) is characterised by 51.5% with less than matric, 38.2% with matric, 6.9% with other tertiary qualifications, 2.7% graduates, and 0.7% with other qualifications. Unemployment is also exceptionally high among the youth and in rural areas. The informal sector provides job opportunities to only approximately 20% of the total employment level. Rates of entrepreneurship and self-employment are low and represent about 10% of employment versus a 30% benchmark for upper-middle-income countries. Barriers such as the concentration of industries, legal constraints, licensing, registration requirements, and zoning laws are some constraints faced by potential entrepreneurs in the informal sector. The high unemployment levels and the capacity

of the economy to create job opportunities are two key drivers of the high levels of inequality, as seen in South Africa.

In addition to job opportunities created by the government or the private sector, individuals can also invest in themselves, known as human capital. Human capital entails that human beings can increase their productive capacity through excellent education and skills training. There is a consensus that investment in human capital is good for growth and reducing poverty and inequality. However, there needs to be more discussion over the precise quantitative effects of human capital on growth, poverty, and inequality and the most efficient forms of investment in education. South Africa's education and training system will have to provide access to equal opportunities and the necessary quality and quantity of educational supply to absorb the workers in the economy and prepare to enter the 4IR. Rapid digital transformation is reshaping the SA economy, altering how the nation learns, works, trades, and accesses information. This raises the expectations of faster growth, innovative offerings, and job opportunities.

Key features of the education system in SA are the declining share of the national budget, low levels of childhood development and adult basic training (ABET), declining further education and training (FET) college students, and poor throughput rates in schools, colleges, and universities. This requires investigating SA's current education situation, allowing access to equal opportunities, and its relationship with employment, poverty, and inequality. Education is regarded as one of the reasons for high levels of income and wealth inequality, but is also seen as a possible remedy to improve income and wealth inequality. This chapter will analyse the current education and training situation in SA with a specific focus on access to education and the quality of education.

Education Spending

Spending on education becomes increasingly important over time.³ According to the World Bank, government expenditure on

education as a total (% of GDP) in South Africa was reported at 6.6% in 2021.

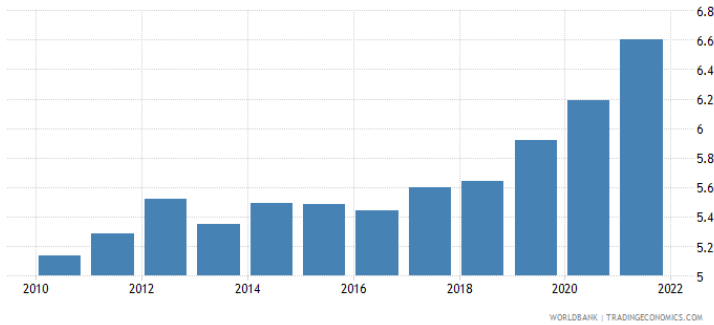


Fig 2 Education expenditure as % of GDP. Source: World Bank

The Current Allocation of SA's Budget

According to the 2023 Budget Speech, the government is expected to spend at least R1.4 trillion over the next three years (2023–2026) on higher and primary education and the sports, arts, and culture functions (as a category). The Department of Basic Education (DBE)'s spending is expected to rise from R39.4 billion in the coming financial year 2023/24 to R316.5 billion in 2024/25 and reach some R331.2 billion in 2025/26.⁴

The Department of Higher Education and Training (DHET)'s expenditure is expected to reach R135.6 billion in 2023/24, R148.3 billion in 2024/25, and R153.9 billion in 2025/26. In addition, in 2023/24, at least R50 billion will be allocated to the National Student Financial Aid Scheme (NSFAS). The projected higher spending on both Basic and Higher Education – with an emphasis on student funding – is a method of government to address both the challenges and inequalities in education.

State expenditure per learner in 1993 amounted to R1 659 per black learner, R2 902 per Coloured learner, R3 702 per Indian learner, and R4 372 per white learner. The South African Schools Act of 1997 founded equal school financing to ensure equal expenditure per learner, not based on race. Although equality of opportunity to education and equal expenditure

per learner, previously determined by race, has been achieved, the quality of education is still determined by social class. The next section explains some of the country's schooling system challenges in achieving equality in South Africa's education and training system.

Challenges in South Africa's Schooling System

In 2021, the number of schools in South Africa amounted to nearly 24 900. Most of the schools were located within KwaZulu-Natal, reaching 6 022 in all. Eastern Cape and Limpopo followed with 5 341 and 3 855 schools respectively. The legacy of apartheid and the current government's inability to implement policies to improve the education system is the result of SA's poor education outcomes. Corruption, as confirmed by the Zondo Commission, has also led to the loss of billions of rand, which could have been spent on the crumbling infrastructure of schools. Access to quality schooling highly depends on socioeconomic factors such as where you live, neighbourhood and province, parents' occupations and income, parents' wealth, and race.⁵

South Africa's unequal school system is reflected in the 20% of schools being functional and well managed, with well-qualified teachers, good infrastructure, and reasonable throughput rates. These schools – which produce Grade 12 learners who obtain the most distinctions – are well funded and subsidised by parents in high-income levels, and are situated mostly in cities and larger towns. The remaining 80% of schools need to be fixed and better managed. They have insufficient teachers, dilapidated infrastructure, and poor throughput rates. They lack funds, and are mostly situated in rural areas.⁶ This inequality is confirmed by government statistics of 2018, which made the following findings:

- 19% of public schools only had pit latrines.
- 86% had no laboratory.
- 77% had no library.
- 42% had no sports facilities.
- 72% had no internet access.

The shortage and ruined condition of physical infrastructure are challenges in providing quality instruction. Other aspects influencing the quality of teaching and learning – especially in rural areas – are insufficient transport, learners walking long distances to school, an insufficient number of teachers, and overcrowded classes where the teacher-to-learner ratio is 1:70 in comparison to the stipulated 1:35 for primary schools and 1:27 for secondary schools. Time spent on teaching and learning in SA schools is estimated at 66%, versus the 78% OECD average. Teacher absenteeism, as well as poor retention of teachers teaching maths and sciences, also influence the quality of teaching learners are receiving. Mother-tongue teaching for the first three years of schooling is also problematic in a country with multiple official languages.

Access to primary and secondary education has improved tremendously since 1994. However, of 100 learners starting school, only 50-60 will make it to matric, 40-50 will pass matric, and only 14 will attend university. South Africa needs to address the throughput rate and quality of schooling. The much-anticipated matric results for 2022 showed an 80.1% pass rate by the class arguably the most affected by COVID-19. However, at Equal Education, the throughput pass rate for the class of 2022 is calculated as the number of matric passes as a percentage of Grade 2 enrolments in 2012, with a rate of 56%⁷ – which could be better. Improved matric pass rates would allow more students access to further education, better employment opportunities, and income, thereby reducing inequality. Thus, the matric results are not an accurate barometer when measuring the health of the education system. We should have a holistic and systemic view of South Africa's education system. Thus, we need to consider several other criteria, including the dropout rate from Grade 1, repetition at particular grades, the quality of the passes, and the results of tests on numeracy and literacy in the early years.⁸

Access and the quality of teaching at the school level will contribute to learners being prepared to enter tertiary education and obtain job opportunities, which will lower inequality. The key conclusions from a Reading Report⁹ regarding Grade 4 learners, launched on 7 February 2023, include the following:

- Roughly 82% of Grade 4 learners cannot read. This figure is up from 78% pre-pandemic. Before COVID-19, it was estimated that 78% of Grade 4 learners could not read for meaning (as seen in PIRLS 2016). The latest research – based on learning losses in the Western Cape – suggests that the figure has risen to 82% because of the pandemic, specifically the closure of schools and the rotational timetables. At our current trajectory, it will take SA 86 years (i.e., until the year 2108) to reach 95% of children reading for meaning.
- SA's Grade 5 learners scored last in a study of 49 countries testing the Trends in Math and Science Study (TIMSS).
- COVID-19 has erased a decade of progress, sending South Africa back to 2011. According to PIRLS, 22% of Grade 4 children could read for meaning in 2016. Due to COVID-19, it is estimated that now only 18% can read for meaning, the same level as in 2011, erasing a decade of progress in reading outcomes.
- Research (published in December 2022) from the North West, Limpopo, and the Eastern Cape shows that less than 50% of children in no-fee schools learn all the letters of the alphabet by the end of Grade 1.
- Although the Director General has referred to a 'National Reading Plan' in parliament, stakeholders have yet to see this document. There also needs to be a national budget for improving home-language reading.
- Only the Western Cape and Gauteng – of the provinces – spent more than R100 million over three years to improve reading.
- The government has spent over R25 billion on Presidency Youth Employment Initiative (PYEI), including educator assistants (EAs), 10% of whom are Reading Champions. As part of its COVID-19 response, the PYEI has employed over 850 000 youth on temporary contracts. An estimated 250 000 youth will be appointed in 2023, and approximately 30 000 will be Reading Champions. Although this is a welcome addition, there is currently no face-to-face training for these youth, and the only requirement is that they must have passed matric.
- Twice as many children learned to read in Limpopo after a two-year intervention with trained teacher assistants and

new reading workbooks. A new evaluation of the Funda Wande intervention in Limpopo (2021-2022) showed that twice as many children learned to read in the intervention schools (34%) compared to children in comparable schools who did not receive the intervention (18%) – the most significant gains seen in SA to date.

History, race, language, geographic location, socioeconomic status, insufficient subject knowledge by teachers, and the political influence of teacher unions are factors contributing to the dismal quality of schooling in SA. Low-quality education is a poverty trap and influences the chances of impoverished people in the labour market and inequality. Policy recommendations will be discussed under the heading of SA's education system.

Private Schools in South Africa

The result of the government's failure to provide quality school education is the increase in the number of private schools in SA. The total number of private or independent schools (IEB schools) is currently close to 2 000, educating about 500 000 learners, of whom 74% are black (60% are black African). The independent schools write the IEB exams, whereas the public schools write the National Senior Certificate (NSC). The IEB schools have consistently recorded matric pass rates above 98% with an 88% bachelor entry, compared with public schools achieving a 75% pass rate with a 29% bachelor entry.

Quality school education comes at a cost that ranges between R1 900 per month to R10 000 per month and could exceed R300 000 per year at boarding schools such as Hilton College and Michaelhouse. Emigration and the high cost of living in SA have resulted in parents moving their children back to public schools. However, the increase in the number of IEB schools indicates the emphasis parents are putting on quality education and the improved opportunities for tertiary education and job prospects, which will improve inequality.

Teachers' Education

Highly qualified teachers will have a tremendous impact on the quality of teaching and learning of learners. The quality of teaching and learning depends not only on the qualifications of teachers, but also on their pedagogical knowledge and the environment in which the teaching is conducted.

The Department of Education required teachers to obtain a Relative Equivalent Qualification Value (REQV) of 13, equal to a three-year initial teacher education after school or matric plus 3. In 2004, 50% of teachers had a REQV 14 qualification.

In 2009, there were 384 938 state-employed teachers in public schools; 96% of the teachers had a Senior Certificate, 30% had some academic qualification, and 89% had a professional qualification (but, of those, only 18% were graduates, i.e., a four-year B Ed degree or a degree plus a postgraduate certificate or equivalent). To improve the quality of teachers, the Integrated Strategic Planning for Teacher Education and Development for 2011–2025¹⁰ proposed the following outcomes:

- **Output 1:** individual and systemic teacher development needs are identified and addressed.
- **Output 2:** increased numbers of high-achieving school-leavers are attracted to teaching – outputs to be led by the provincial education departments.
- **Output 3:** teacher support is enhanced locally – outputs to be led by the Department of Higher Education and Training.
- **Output 4:** an expanded and accessible formal teacher education system is established.

Data indicate a steady rise in teachers obtaining at least a bachelor's degree or higher diploma from 2021. By 2021, 89% of employed teachers qualified equal to REQV 14.¹¹ However, the increase in teachers' qualifications has yet to make the expected and much-needed impact on South Africa's teaching quality.

This section has shown that the opportunity to access school education in South Africa has improved in the past 20 years, but that the quality of school education requires urgent

attention. The following section will reflect on the opportunity to access tertiary education and its effect on inequality.

South Africa's Tertiary Education

South Africa has 26 universities in total, following the launch of three new institutions in 2014. Sefako Makgatho Health Sciences University, located north of Pretoria, was unveiled in April 2015, adding to the two launched in 2014: Sol Plaatje University in the Northern Cape, and the University of Mpumalanga. South Africa's universities accommodate more than 1 million students, with plans by the government to add 500 000 to that total by 2030. A tally of the most accurate figures shows that 25 of the 26 universities have a combined total exceeding 622 000, while Unisa, with 400 000 students, is the most prominent tertiary institution in SA.

The country's universities are divided into the following categories:

- Nine universities of technology focused on vocationally oriented education.
- Six comprehensive universities offering a combination of academic and vocational diplomas and degrees.
- Eleven traditional universities offering theoretically oriented university degrees.

Pretoria has five universities, Cape Town has three universities, and another university is nearby in Stellenbosch. Three universities service Johannesburg, while Bloemfontein and Durban each have two.

Access to Tertiary Education

The government has published a review (2019) of the last 25 years of democracy, highlighting some of their failures and successes in tertiary education. The document displays that the number of students graduating has steadily increased over the last two decades, with a total of 58 560 students graduating in 1994 compared to 210 931 students in 2017.¹² While throughput has

improved at universities, only 22% of students completed their three-year degree within three years (using the 2010 cohort). The implication is that the tertiary sector can be increased further if more students complete their degrees within the expected time. For black African students (registered for a three-year degree), 22% dropped out in the first year, compared to 15% for whites in 2011. Therefore, measures are required to ensure succession when students reach university, since it is estimated that over 40% of all first-year students in South Africa still need to complete their degrees.¹³

According to the GHS of 2021, the total number of students enrolled at higher education institutions increased by almost 57.8% between 2002 and 2021, growing to 968 109. The percentage of black African students increased by 13.3 percentage points to 73.5% during this time, while the percentage of white students virtually halved to 14.8%. Even though most students are black African, the education participation rate of this population group remained proportionally low in comparison with the Indian/Asian and white population groups. The percentage of persons aged 18 to 29 enrolled at an institution of higher education in the country increased from 4.3% in 2002 to 6.5% in 2021. Enrolment at a higher education institution was most common among whites (24.6%) and Indians/Asians (16.2%), while only 6.2% of the Coloured and 5.3% of the black African population groups were enrolled.

The question arises: Are the alarming throughput rates due to the poor quality of applicants, or the quality of education offered at higher education institutions in South Africa? Or is it a result of unequal education at the school level? Employers sometimes voice concern over the quality of graduates exiting from universities. At the same time, higher education feels that employers need to be more fully appreciative of what qualities and skills these graduates possess. There is pressure on higher education from both government and employers to produce employable graduates because they have the attributes, capabilities, and dispositions to work successfully. A survey conducted by the financial services group (on 3 304 students focused on professional degrees) found that as many as 25%

felt they needed to be more prepared for higher education. In contrast, 43% of the students said they had been moderately prepared.¹⁴ The Professional Provident Society (PPS) has warned that the government needs to do more to improve the standard of education. Only 20% of the students surveyed believe that local universities offer competitive education on par with their international counterparts. Thus, quality education at school and undergraduate levels will be required to support the government's 2030 vision to raise education and skills levels and increase workforce productivity.

The National Development Plan (NDP) for 2030 set ambitious targets for higher education and STEM (science, technology, engineering, and mathematics) subjects in particular:

- Increase the number of university science and maths entrants to 450 000;
- Increase graduation rates to more than 25% by 2030 – this involves a significant increase of graduates in STEM fields; and
- Produce more than 100 doctoral graduates per million annually by 2030 – most of these should be in STEM.¹⁵

Access to tertiary education has also improved over the past 20 years. However, the quality of student attributes to enter the labour market is questioned, as it hurts prospects of inequality. The following section discusses the role of financing tertiary studies and the opportunity to access tertiary education.

Financing of Tertiary Studies

In 2015, students at universities across South Africa protested around the issues related to funding, outsourcing of university staff, and decolonisation of the university curriculum. A 0% increase in university fees for 2016 and an increase of not more than 8% for 2017 was announced. In 2016, students took their protests to the Union Buildings and Parliament. President Zuma announced “**free education**” for students from poor and low-income families in 2017. In 2023, almost 1 million students will benefit from the R47 billion allocated for NSFAS bursaries. The

cost of the NSFAS scheme to the government and the South African taxpayers has been escalating at a rate that will soon result in the cost of the NSFAS scheme exceeding the subsidies allocated to higher education institutions. NSFAS has introduced the N+ rule, allowing four years to complete a diploma and five years to obtain a degree for students receiving NSFAS funds. However, stricter academic performance rules can be applied to ensure quicker throughput rates and money well spent.

Inequalities also exist in the allocation of NSFAS funding for tertiary education. Students from the 'missing middle' are not eligible for NSFAS funding, requiring an annual household income of R350 000 or less. These students could come from large families that cannot afford to pay for tertiary education, or could have been made responsible for funding their studies. The concept of the missing middle has gained currency within South African post-school education and training (PSET) discourse in recent years. The term has been defined as representing those too wealthy to benefit from National Student Financial Aid Scheme (NSFAS) funding, but who struggle to afford higher education. The missing middle currently refers to those students from households with annual incomes between R350 000 and R600 000. While some 6% of South African households have incomes between R350 000 and R600 000, differing participation rates and average household income levels amongst students from different race groups result in an estimated size of the missing middle in 2019 of 343 000 students out of a total PSET population of 1.4 million. The cost of funding full bursaries for all these students at 2019 prices is estimated at R19.2 billion. If a sliding scale of support is introduced, the total cost falls to R11.4 billion.

Data show that student debt has grown significantly in South Africa's university sector in recent years. The unaudited data showed that an estimated R6.1 billion was owed by students at the start of the 2021 academic year. The audited accumulated gross student debt as of 31 December 2020 is R16.5 billion. The amount includes students who have exited the universities with debt. A survey conducted by the department in 2021 showed that an estimated 56.2% of students with debt owe less than R10 000, 32.9% owe between R10 000 and R50 000, and 10.9%

owe more than R50 000. The survey also showed that NSFAS students owe R5.3 billion. Excessive student debt is a burden for both universities and the taxpayer. Students should receive equal access to tertiary finance to ensure equal opportunities for tertiary education for all income groups.

Policy Recommendations for Education in South Africa

Education policy changes since 1994 have been framed within the government’s macroeconomic strategies, such as RDP, GEAR, ASGISA, and NDP, which resulted in increased access to primary, secondary, and tertiary education. Despite the increased access to education in SA from 1994 at both the school and tertiary levels, it has yet to improve economic growth or unemployment (see Figure 3).

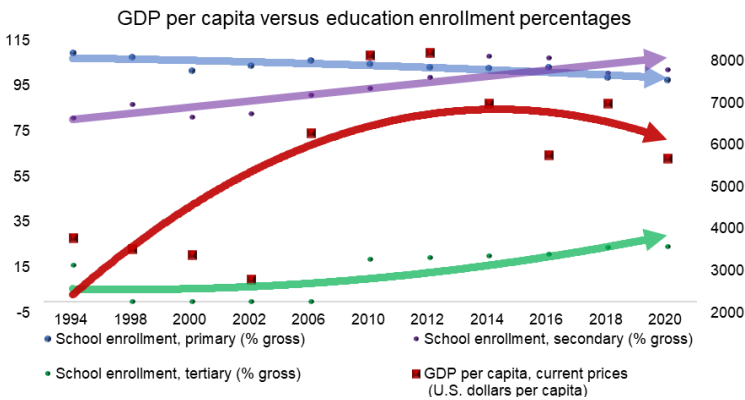


Fig. 3 Education enrolment and GDP

In line with international trends and recommendations to improve the quality of education¹⁶ in South Africa, the following recommendations are made:

- Keep to the basics in primary education, and focus on reading, writing, and arithmetic.
- It is essential to mention that the initiative to rectify the educational backlog starts from an early age. Thus, it is

- recommended to provide a minimum set of reading resources to all foundation phase classrooms (Grades R-3) urgently.
- Improving and continuous teacher training would support quality teaching at all school levels. Re-introducing teacher training colleges to provide diploma courses for individuals to become teachers is needed.
 - Implement measures to make the teaching profession a sought-after career choice. Increase the admission requirements for prospective teachers at colleges and universities to ensure the best students are attracted to the profession. Provide financial incentives to teachers regarding salaries and other benefits to make the teaching profession attractive as a career option. In countries like South Korea and China, teachers are well paid, and prospective teachers are selected on strict prerequisites.
 - Provide financial incentives to improve teachers' performance and to attract quality teachers to the profession. Financial rewards can be connected to subjects such as maths, science, and accounting or learners' performance.
 - Policies to improve school management will have to be implemented.
 - Improving teacher performance and accountability will be re-introduced. Currently, subject advisors are not allowed to attend classes while teaching occurs.
 - I am implementing a universal standardised reading assessment at the primary school level to improve the measurement early in learners' careers.
 - Policies to increase school accountability to the community should be introduced.
 - We are improving teacher performance and accountability.
 - Continuous teacher training, including a university audit of pre-service teacher education programmes, should be implemented.
 - Adopt policies that will ensure that teacher unions and associations' actions are not detrimental to teaching and learning practices, such as allowing subject advisors to visit classes and advise teachers to improve teaching and learning.

- Adapting a school and the implementation of the Presidential Youth Employment Initiative should be encouraged.
- The allocation of meaningful budgets to reading resources and reading interventions are required, for example a National Reading Plan and the necessary budget for its implementation.
- The use of technology and the offering of online classes improve the quality of teaching and learning in schools in remote areas.
- Academic performance requirements are to be set for NSFAS recipients and for the continuation of receiving the bursary, to ensure that students take their studies seriously. Strict academic performance requirements govern tertiary bursaries and loans granted by the Lesotho government.
- Create the capacity to train technicians, artisans, and technical-skilled people in high demand in South Africa.
- Post-1994, 80 specialist training colleges were relocated to 23 universities. Re-introducing nursing and technical colleges would alleviate the pressure on universities.

The government should prioritise education and allocate the necessary resources to ensure that every child in the country can access quality education. It should also be mentioned that such budgets must be used according to plan, to avoid underspending when there is so much need. Failing to fix the education system will have dire consequences for the country's future economic growth, development, and inequality.

Conclusion

This chapter has indicated that the South African education system has improved access at school and tertiary levels. However, the improved access did not affect economic growth, employment, or inequality in South Africa. The school infrastructure has both First- and Third-world characteristics, reflected in the 20% of schools with good infrastructure and 80% with appalling infrastructure. The quality of teaching at the primary and secondary levels still needs to be addressed urgently. Although the infrastructure and facilities at the tertiary level are

of a high quality, the quality and relevance of tertiary education still need to be questioned.

Although fixing the education system is crucial to ensure equal opportunities in education, quality education is still determined by families' income and social status. One of the steps towards achieving this is acknowledging the severity of poverty and inequality within the education system. Therefore, creating employment opportunities in a growing economy is essential to break the cycle of poverty and provide access to quality education.

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