



**Strategic, human resources and
economic perspectives on
education disparities within South
African labour force**

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for the degree *Master of Business Administration* at the
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DECLARATION

I, **Tshililo Tshikosi**, declare that this study:

Strategic, human resources and economic perspectives on education disparities within the South African labour force is my own work apart from where sources are acknowledged.

This study is submitted for the degree of Master of Business Administration to the Faculty of Economic and Management Sciences, North-West University.

It has not been previously submitted by me or any other person for a degree at any other institution.

Tshililo Tshikosi

Date: November 2025

ABSTRACT

Educational disparities within the South African workforce continue to hinder economic development, particularly as the country seeks to integrate matriculants and unemployed youth into the labour market. This study examines how strategic human resources interventions and economic policies can address these persistent inequalities. The literature review synthesizes historical and contemporary perspectives on educational disparities, revealing that apartheid-era inequalities in school funding and infrastructure continue to shape outcomes, with learners from historically disadvantaged communities demonstrating weaker foundational skills in literacy, numeracy, and digital competencies. These deficits manifest as vertical mismatches, where matric-level employees lack qualifications for skilled roles, and horizontal mismatches, where short-course training fails to align with industry requirements.

Strategic HR interventions, including Recognition of Prior Learning (RPL) pathways, apprenticeships, and structured internships, emerge as critical mechanisms for bridging education-employment gaps. RPL enables workers to convert experiential learning into NQF-aligned credits, reducing duplication and accelerating career progression. Apprenticeships, regulated through Sector Education and Training Authorities (SETAs), combine workplace training with institutional learning to address intermediate skills shortages in manufacturing, engineering, and digital technologies. Structured internships provide mentored, time-bound workplace exposure that enhances employability and reduces frictional unemployment. However, literature indicates that implementation challenges persist, including limited awareness among target populations, inconsistent employer engagement, variable quality assurance across sectors, and weak alignment between training programmes and labour market demands.

Economic policy frameworks, particularly the Skills Development Levy system, provide foundational funding for these interventions but demonstrate significant limitations. Current levy utilisation patterns favour short-course compliance training over accredited qualifications, limiting transformative impact on matric-level workers. Stakeholder perceptions gathered from literature suggest cautious support for expanded corporate funding mechanisms, provided these include adequate incentives such as tax breaks, enhanced B-BBEE recognition, and streamlined administrative processes. Hybrid funding models combining public allocations, SETA grants, corporate contributions, and industry-

pooled funds emerge as more resilient and scalable approaches for sustaining upskilling pathways during economic volatility.

Public-private partnerships function as integrative mechanisms coordinating government, industry, and training institutions. Literature from the Swiss-South African Cooperation Initiative and sectoral case studies demonstrates that effective PPPs enhance programme quality, mentorship availability, and labour-market alignment. Critical success factors include robust governance structures, demand-led training frameworks utilising real-time labour market intelligence, and strengthened monitoring and evaluation systems tracking RPL uptake, internship placements, learnership completions, and employment absorption rates.

The conceptual framework synthesising these elements illustrates how strategic HR interventions, economic policy instruments, and institutional cooperation jointly address educational disparities. Mediating variables including stakeholder perceptions, access to qualifications, and workplace learning quality shape intervention outcomes, which manifest as reduced skills mismatches, improved employment outcomes for matric-level youth, and enhanced national productivity. The literature confirms that sustainable solutions require integrated approaches addressing both educational quality and labour market structure, with multi-stakeholder collaboration holding the key to halting deep-seated inequalities that have persisted over generations.

Key words: Corporate Funding, Economic Policy, Education Disparities, Matric-Level Employees, Public-Private Partnerships (PPPs), Recognition of Prior Learning (RPL), Skills Development, Strategic Human Resources, and Youth Unemployment.

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LIST OF ABBREVIATIONS AND ACRONYMS

Abbreviation	Full Term
4IR	Fourth Industrial Revolution
B-BBEE / BEE	Broad-Based Black Economic Empowerment
CCMA	Commission for Conciliation, Mediation and Arbitration
DBE	Department of Basic Education
DHET	Department of Higher Education and Training
ECD	Early Childhood Development
ETF	European Training Foundation
ETI	Employment Tax Incentive
FET	Further Education and Training (now largely under TVET)
GDP	Gross Domestic Product
Gini Coefficient	Measure of income or wealth inequality
H1 / H2	Hypothesis 1 / Hypothesis 2
HEI	Higher Education Institution
HR	Human Resources
HRD	Human Resource Development
HRDS-SA	Human Resource Development Strategy for South Africa
HRM	Human Resource Management
HSRC	Human Sciences Research Council
ICT	Information and Communications Technology
ILO	Organisation
IT	Information Technology
LMI	Labour Market Intelligence
M&E	Monitoring and evaluation
MBA	Master of Business Administration
NDP	National Development Plan
NEET	Not in Education, Employment, or Training
NGO	Non-Governmental Organisation

Abbreviation	Full Term
NPC	National Planning Commission
NQF	National Qualifications Framework
NSDP	National Skills Development Plan
NSF	National Skills Fund
NSFAS	National Student Financial Aid Scheme
NWU	North-West University
OECD	Organisation for Economic Co-operation and Development
PIRLS	Progress in International Reading Literacy Study
POPIA	Protection of Personal Information Act
PPP	Public-Private Partnership
QCTO	Quality Council for Trades and Occupations
RBV	Resource-Based View
RCT	Randomised Controlled Trial
REC	Research Ethics Committee
RPL	Recognition of Prior Learning
SABYA	South African Business Youth Association
SADC	Southern African Development Community
SAQA	South African Qualifications Authority
SARB	South African Reserve Bank
SARS	South African Revenue Service
SASA	South African Schools Act
SDA	Skills Development Act
SDG	Sustainable Development Goal
SETA	Sector Education and Training Authority
SHRM	Strategic Human Resource Management
SME / SMEs	Small and Medium-sized Enterprise(s)
SSACI	Swiss-South African Cooperation Initiative
Stats SA	Statistics South Africa

Abbreviation	Full Term
STEM	Science, Technology, Engineering, and Mathematics
STS	Skills Development Strategy
TIMSS	Trends in International Mathematics and Science Study
TVET	Technical and Vocational Education and Training
X-inefficiency	Inefficiency due to a lack of competitive pressure

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CHAPTER ONE

OVERVIEW OF THE STUDY

1.1 INTRODUCTION AND BACKGROUND

The study addresses skills gaps in the South African labour market, citing economic and strategic human resource (HR) interventions to enhance the skills of matric-qualified workers and to fund education for youths. The format is as follows: Section 1 states the problem and its significance; Section 2 states the research problem; Section 3 states the contribution of the research; Section 4 states purpose and objectives; Section 5 literature reviews; Section 6 conceptualises key concepts; Section 7 states the methodology, in terms of philosophy, design, population, data collection, analysis, and ethics; Section 8 provides the dissertation outline; Section 9 states the research schedule; Section 10 states limitations; and Section 11 provides references.

The South African labour force continues to struggle with apartheid education inequalities (1948–1994) that systematically invested in white society at the expense of black South Africans and other groups through schools starved of resources (Christie, 2020). Two-thirds of black South Africans over age 25 lacked any primary education at the end of apartheid, and only 4% held a matric certificate, in contrast to the near universal secondary completion among whites (HSRC, 2018a; 2018b). Even though post-1994 changes such as the South African Schools Act (1996) were intended to promote greater access to education, the problems persist. Township and rural schools, handicapped by outdated infrastructure, a lack of textbooks, and underqualified teachers, produce matriculants that are poorly equipped to participate in a skills economy (Spaull, 2019). Some 34% joblessness and more than 60% youth unemployment (15–24 years) are well above international benchmarks. This generated a matching skills deficiency that has been costing the economy as much as 1.5% of GDP per annum (Stats SA, 2023a; Bhorat, 2023). They are cumulative imbalances that perpetuate poverty, fuel inequality, and arrest South Africa's economic development.

At an international level, they compound failure to achieve Sustainable Development Goal 4 (SDG 4) on quality, inclusive education—a sector in which South Africa lags behind more industrialised nations like South Korea (World Bank, 2022). Regionally, in the Southern African Development Community (SADC), South Africa is less competitive than

similar countries like Botswana, whose economic trajectory is driven by vocational training and enhanced literacy (Kotze et al., 2019). Nationally, matric-graduates are also stuck in low-skilled, low-paid occupations (e.g., cleaners, drivers, and shop assistants), while industries like manufacturing, finance, and IT are plagued by acute shortages of skilled workers (Reddy et al., 2023).

1.2 PROBLEM STATEMENT

The South African labour market is challenged by disparities in education, which have a historical basis in apartheid, resulting in black people, as well as people in peripheral areas, being denied access to quality education. Workers who possess only a matric certificate, equivalent to 12 years of formal schooling, appear to be insufficiently qualified for professional work in a more advanced, technically and professionally competent economy (Van der Berg, 2021). Furthermore, it is exacerbated by a youth unemployment crisis, in which 60% of people between the ages of 18-35 years fall into this category, which is substantially higher than international rates due primarily to a lack of access to further education after obtaining a matric certificate (National Planning Commission, 2023; Bhorat, 2023). It is an existential threat to both individuals' livelihoods and the socio-economic foundations of South African society, which costs South Africa approximately 1.5% of GDP annually (Stats SA, 2023a).

These are initiatives put in place by the government to level the playing field in terms of inequalities through interventions in training and education, such as the Skills Development Act. Budgetary shortfalls soon limit accessibility, as SETA intervention programmes benefit only 1.2 million learners in a year, even though more than 20 million constitute the youthful population (DHET, 2022; National Planning Commission, 2023). On a parallel note, the involvement of the private sector, probably in response to satisfying the principle of Broad-Based Black Economic Empowerment (B-BBEE), tends to focus more on certificate courses than formal training, thus avoiding matric workers in low-skilled sectors like warehousing personnel, call centre staff, focusing less on alleviating the issue of unemployed youth (Reddy et al., 2023; Ready & Moletsane, 2022a, 2022b).

Though authors such as Spaull (2020) and Van der Berg (2021) have documented extensively in relation to such inequalities in education, such studies have not conducted an in-depth analysis of how strategic HR processes, such as Recognition of Prior

Learning, structured apprenticeships, and cadetships, can aid in transitioning matric employees from short-course qualifications to full qualifications. Moreover, a significant research gap exists in understanding how economic policies may necessitate corporate contributions to support youth education strategically across sectors, rather than current compliance-based measures.

The central research problem is thus the systemic lack of opportunities for matric employees and unemployed youth to achieve full qualifications, as perpetuated by a compliance-driven HR practices discourse and inadequate policy instruments. A failure here traps matriculants in low-skilled jobs, aggravates youth unemployment, and ultimately threatens economic growth and social justice.

1.3 STUDY CONTRIBUTION

The aim of this research is to merge economic and strategic HR interventions to reskill matriculants and fund youth education across industries, reducing unemployment (Taylor, 2020). Theoretically, it contributes by integrating human capital and social justice theories with HR practice and economic policy, offering a fresh perspective on mitigating skills shortages (Noe, 2017). Practically, it seeks to transform HR by prioritising full qualifications over short-term training and challenging labour legislation to mandate corporate investment, with benefits for youth, businesses, and policymakers (Bhorat, 2023). Anticipated outcomes are better skills, reduced unemployment, and a model for public-private partnerships, enriching HR and economics disciplines. The study aligns with SDG 4 (quality education) and SDG 8 (decent work and economic growth), promoting shared prosperity in South Africa (National Planning Commission, 2023).

1.3.1 Purpose and Objectives

The purpose is to explore how strategic HR and economic interventions can reduce educational disparities, enhance skills among matric employees, support government efforts to educate youth across South Africa's labour force, and foster productivity and equity.

1.3.2 Objectives

1. Assess the effectiveness of current HR interventions in upskilling employees who hold a Matric with full qualifications.

2. Identify barriers preventing matric employees from accessing higher qualifications.
3. Evaluate the feasibility of economic policies mandating corporate funding for youth education across industries.
4. Determine strategies for public-private partnerships to strengthen government-led education initiatives.

1.4 RESEARCH QUESTIONS

1.4.1 Primary Research Question:

How do matric employees and HR professionals perceive the capacity of strategic HR interventions (RPL pathways, apprenticeships, structured internships) to facilitate transitions from short-course training to full qualifications?

1.4.2 Secondary Research Questions:

1. What systemic and individual barriers prevent matric employees from accessing higher qualifications through strategic HR interventions?
2. What are stakeholder perceptions regarding the feasibility and potential impact of economic policies that mandate corporate funding for youth education across industries?
3. What strategies can enhance public-private partnerships to support government-led education initiatives specifically for matric-level employees and unemployed youth?

1.5 LITERATURE REVIEW

1.5.1 Historical Background of Education Inequities

The Apartheid (1948–1994) entrenched educational inequalities by underfunding schools for black and marginalised communities, resulting in two-thirds of black South Africans over 25 lacking primary education by 1994 (Christie & McKinney, 2020a). Post-apartheid reforms, including the South African Schools Act of 1996, expanded access, but rural and township schools continue to face challenges such as poor infrastructure and underqualified teachers (Spaull, 2019).

1.5.2 Current Labour Market and Skills Mismatch

South Africa's 34% unemployment and 60% youth unemployment reflect a skills mismatch, with matriculants not prepared for fields like IT and finance (Stats SA, 2023a; Reddy, 2023). Government programs, such as SETA programs, reach only 1.2 million learners annually, which is inadequate for a population of more than 20 million youths (National Planning Commission, 2023). Private sector short courses, driven by B-BBEE compliance, fail to provide comprehensive qualifications (Reddy et al., 2023). Conflicting perspectives exist: Spaul (2019) highlights educational quality as the primary barrier, while Bhorat (2023) emphasises structural labour market issues, suggesting the need for an integrated HR and economic solution.

1.5.3 Strategic HR Interventions as a Bridge

Human Resource (HR) strategies could help matriculate employees onto firmer ground, yet the field leans heavily on short courses rather than full qualifications (Noe et al., 2017). Taylor and Yu (2020) argue that comprehensive training, such as diplomas or degrees, could transform employability, lifting workers from dead-end jobs to skilled roles across industries. In South Africa, Moses et al. (2021) highlight private-sector experiments, such as mentorship in finance, that boost skills, but these are patchy and sector-specific. HR's potential to bridge disparities is clear: upskilling matric workers could shrink the gap between education and job demands (McGrath, 2012). Yet, multi-sector plans remain thin, and most interventions target single industries rather than the labour force (Van der Berg, 2021). This narrow lens limits HR's reach, leaving matric employees underserved.

1.5.4 Economic Policies and Corporate Funding

Economic policies could pivot private corporations from compliance to catalysts for change, but current efforts fall short. Firms, bound by a 1% skills levy, funnel funds into short courses to earn B-BBEE points rather than invest in mass education (DHET, 2022). Reddy et al. (2023) critique this as a tick-box exercise that ignores the need for full qualifications across sectors. Arndt et al. (2024) propose a bolder tack: mandated corporate funding to back government initiatives like the NDP and to educate thousands of youths for all industries. Bhorat et al. (2023) estimate this could unlock billions in economic gains by slashing unemployment and boosting productivity. Case studies, like mining firms funding bursaries, hint at potential, but laws don't compel scale or a multi-

sector focus (Moses et al., 2021). This gap between compliance and transformative investment hobbles progress.

1.5.5 Youth Unemployment

Youth unemployment at 60% is a screaming symptom of educational gaps (Stats SA, 2023b). Hlatshwayo (2022) traces this to a lack of higher education, with matric leavers flooding a market that demands more. The National Planning Commission (2023) flags over 40% of youth as unqualified, a statistic that fuels social unrest and economic drag. Wide-scale funding could swing open doors. Imagine thousands studying engineering, health, or trades. However, research stays myopic, focusing on pockets rather than the whole (Taylor & Yu, 2020). Bhorat et al. (2023) note that education investments yield long-term gains, yet South Africa's youth remain trapped by short-term fixes

1.6 SIGNIFICANCE OF THE STUDY

This study stands out because it tackles an area that is a crucial intersection of social justice, economic policy, and human resource management strategies in the South African setting. The relevance of this study can thus be considered threefold because it:

Theoretical Significance: This study makes a theoretical contribution by synthesising Human Capital Theory (Tian & Tóth, 2024; Giamos & Stroehle, 2024), Social Justice Theory (Hwang, 2025; Öhlund & Wiberg, 2025), and the Resource-Based View of the firm (Kero & Bogale, 2023; Abel et al., 2025) into a unified theoretical approach. This combined theoretical approach offers an innovative perspective that extends the meaning of educational inequality beyond an efficiency problem, with significant implications for organisations, by considering educational investment.

Practical Implications: Results have implications for various parties:

- HR Professionals and Corporate Executives/Leaders will gain an evidence-based critique of compliance-based training and an actionable agenda for designing transformative upskilling programs based on the results of this study that target matric-level employees.
- As Policymakers within the government and SETAs, it analyses the viability of currently employed economic tools such as the Skills

Development Levy, with new models designed to improve Public-Private Partnerships and funding mandates within corporations.

- As the study deals with the Matric-level Employee and the Unemployed Youth, the study revolves around their experience and highlights their issues and makes the case for the changes that could bring them mobility.

Policy Significance: This study could therefore apply to the agenda of the National Development Plan NDP 2030 (National Planning Commission, 2013, 2023) as well as the Sustainable Development Goals (SDGs), of which 'SDG4 Quality Education; and SDG8 Decent Work and Economic Growth' are specific targets (Camilleri & Camilleri, 2020) and *SDG8 Decent Work and Economic Growth* (Kreinin & Aigner, 2021). These could further help develop more optimal skills development policies that address unemployment and, by extension, economic growth.

1.7 RESEARCH GAPS

This section summarises the study's scientific approach.

1.7.1 Delimitation of the study

The literature lays a foundation but leaves critical threads dangling:

1. **Matric Focus:** HR strategies for matric employees are sidelined. Spaul (2019) maps disparities but skips how HR can upskill this group with full qualifications across industries (Noe et al., 2017).
2. **Corporate Push:** Multi-sector funding with the government lacks depth. Reddy et al. (2023) critique B-BBEE but don't model mandated corporate roles for mass education (Arndt et al., 2024).
3. **Youth Scale:** Mass education's fix for unemployment is untouched. Hlatshwayo (2022) flags the crisis, but scale and breadth evade scrutiny (Bhorat et al., 2023).

This study ties these loose ends, weaving strategic HR to lift matric workers and economic policies to fund youth education across South Africa's labour force, slashing disparities and unemployment.

1.7.2 Theoretical Framework

These theoretical frameworks will actively guide data collection and analysis throughout the study. Human Capital Theory will inform the examination of perceived returns on investment in full qualifications versus short courses (Becker, 1993; Noe et al., 2017). Social Justice Theory provides an ethical lens for analysing equity in access to transformative upskilling opportunities (Rawls, 1999; Spaul, 2019). The Resource-Based View will frame the investigation of how organisations perceive investment in matric-level human capital as a strategic advantage versus a compliance burden (Barney, 1991; Wernerfelt, 1984). This integrated theoretical approach enables a comprehensive critique of current practices and the construction of equitable, efficient intervention models (Braun & Clarke, 2021).

1.7.3 Research Philosophy

In line with a critical research paradigm (Levitt et al., 2021), this study employs a qualitative methodology (Muzari, Shava & Shonhiwa, 2022) to examine, through stakeholder perspectives, the lived realities of educational inequalities. A multiple case study design (Adams et al., 2022), encompassing different sectors of the economy, provides rich data through semi-structured interviews with matric employees, unemployed youth, HR personnel, and policymakers, as well as document analysis. The data are to be coded according to a thematic analysis, in which results will be organised according to research-developed personas to inform an in-depth analysis of the barriers and facilitators to the transition from education to employment (Young & Diem, 2023).

1.7.4 Research paradigm

The critical paradigm supports this study's goal of addressing educational differences in South Africa's workforce through a social justice lens. This study examines inequalities arising from historical and structural causes (Bryman, 2016). Reflexivity Statement: As a South African scholar from a marginalised community, my experience of educational and socio-economic challenges has driven my dedication to fair education and shaped how I understand the data. To reduce bias, I will keep detailed records. I will also use trained fieldworkers for half of the interviews, and I will use reflexive journaling to think carefully about how my history affects data collection and analysis, which will keep my understandings based on what participants say (Creswell, 2014)

This study is anchored in a critical paradigm, a lens that seeks to unearth and challenge systemic inequities while advocating transformative reform (Guba & Lincoln, 1994). Unlike positivism, which leans on detached, numerical truths and assumes a neutral reality, the critical paradigm recognises power imbalances. Here, the legacy of apartheid's educational divide aims to empower marginalised groups like employees who hold a Matric qualification and unemployed youth (Kincheloe & McLaren, 2005). It rejects interpretivism's sole focus on subjective meanings, instead pushing for actionable change to address disparities in skills and opportunities (Denzin & Lincoln, 2011). This choice aligns with the study's intent to probe the structural barriers faced by matric workers and youth, critique the roles of corporations and governments, and propose interventions grounded in equity. By rooting out these systemic gaps, the critical paradigm aligns with the research's emancipatory goals, making it a better fit than positivism's cold stats or interpretivism's inward gaze.

The critical paradigm aligns with the study's emancipatory goal of addressing educational disparities. As a researcher, my positionality as a South African scholar with lived experience in marginalised communities shapes my perspective, ensuring sensitivity to participants' contexts and fostering trust (Bryman, 2016).

1.7.5 Research approach

Flowing from the critical paradigm, this study adopts a qualitative approach, privileging the voices of stakeholders (matric employees, youth, HR managers, and policymakers) to unravel the lived realities of educational disparities (Creswell, 2014). Qualitative methods excel at exploring complex social phenomena, here the interplay of historical inequities, corporate funding, and labour force dynamics, where numbers alone (quantitative) might miss the depth of human experience (Flick, 2018). A mixed-methods approach was considered but rejected; quantitative data, such as unemployment rates, are already well documented (Stats SA, 2024), and this study seeks to dig beneath these figures to understand *why* and *how* disparities persist and can be addressed. The qualitative lens ensures a rich, contextual tapestry, vital for crafting interventions that resonate with South Africa's unique challenges.

1.7.6 Research design

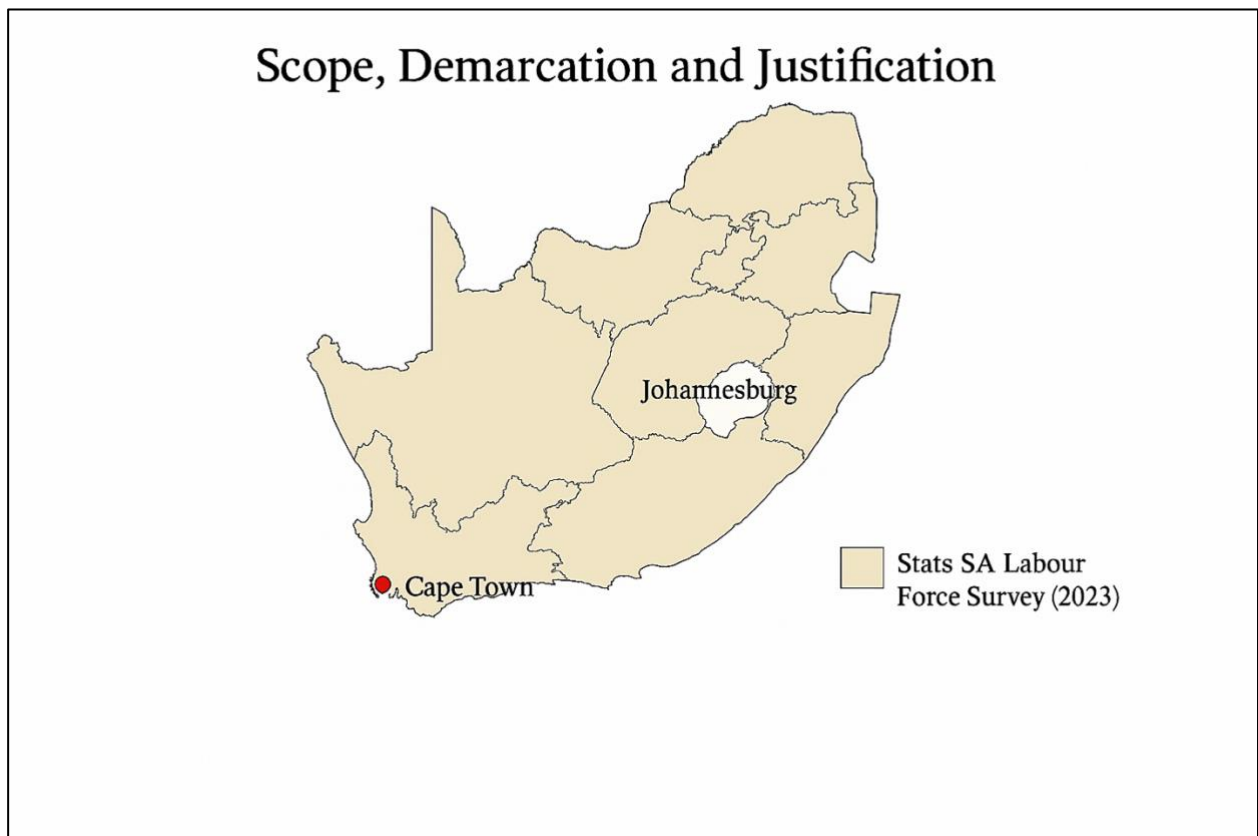
The study employs a multiple case study design, zooming in on employees who hold a Matric qualification and unemployed youth across diverse South African industries, finance, manufacturing, IT, and more, to ground solutions in real-world contexts (Yin, 2018). Unlike a single case study, which might limit breadth, or an ethnography, which demands prolonged immersion, the multiple case approach balances depth and variety, capturing how disparities play out across sectors (Stake, 2006). Each case, drawn from different industries, serves as a lens for exploring HR interventions and the impacts of corporate funding, with cross-case analysis revealing patterns and differences. This design aligns with the study's aim to propose scalable, multi-sector strategies, offering a practical scaffold for understanding systemic issues and testing the feasibility of solutions, as Yin (2018) champions for policy-relevant research.

1.7.6 Demarcation

This study is geographically bounded to the Republic of South Africa, defined by all nine provinces according to Statistics South Africa's Labour Force Survey (Stats SA, 2023b). It encompasses the entire labour force, including both formal and informal employment, as well as unemployed people, in the working-age group of 21–35 years across all major economic sectors, rather than a single industry focus. This is because systemic labour-market disparities are better served by including the whole rather than analyses confined to sectoral silos, such as insurance. International comparisons and cross-border labour flows are excluded to retain a national perspective that accounts for South Africa's unique post-apartheid socio-economic configuration. Empirical boundaries in this respect are pegged to Statistics South Africa's labour force classifications, ensuring methodological stringency and policy relevance. These boundaries are justified by the need to generate findings that are nationally grounded and aligned with policy imperatives, such as the National Development Plan (NPC, 2012) and the Employment Equity Act (SA, 1998), both of which aim to redress structural inequalities within the domestic labour market. The representation of all provinces and sectors provides a detailed portrait of labour dynamics and enables the identification of disparities that cut across sectors rather than those confined to specific industries. International comparisons are excluded to avoid confounding variables that do not resonate with the policy environment in South Africa and, hence, to ensure methodological consistency.

The research will be operationalised in cooperation with the Telesure Investment Group to enhance practical relevance, engaging participants from its Johannesburg and Cape Town offices, supplemented by selected volunteers from the South African Business Youth Association (SABYA) based in Johannesburg. Such arrangements provide access to corporate and youth advocacy perspectives, thereby offering a heightened potential for actionable recommendations in support of inclusive workforce development.

Figure 1.1 Demarcation Map



Source: Researcher's own

1.8 POPULATION

In this study, qualitative data analysis will be done using Manual Thematic Analysis, which has been chosen because it can assure a rich, detailed, and nuanced account of the data. A systematic six-phase framework by Braun and Clarke (2021) will be used to conduct this process, ensuring methodological rigour. Analysis will be supported by a structured coding framework in Microsoft Excel, which will help manage data transparently and in an organised manner throughout the analytical process. These six phases will be conducted one after another, starting with

immersion and familiarisation with the data through repeated reading of transcripts. Subsequently, initial codes will be generated systematically, collated, and then sorted into potential themes. The candidate themes would then be reviewed for coherence as well as for consistency with the original data, which would later be further refined for naming to capture their essence prior to writing an analytical report of findings synthesised from them.

1.9 RIGOUR/ VALIDITY & RELIABILITY

An audit trail is to be maintained throughout the research process, including the number of sessions conducted, attendance register, speaking turns, and the presence of the facilitator and moderator. Reliability is thought of in terms of stability, equivalence, and internal consistency. A record of who is present in a particular session and who is absent speaks to the session's stability. Equivalence is achieved through the attendance of the same facilitator and note taker at each session. Only one primary member performed the analyses, which enhances internal consistency. All these elements add to the rigour of the study. In qualitative research, rigour or trustworthiness refers to the level of assurance in the data, the interpretation, and the techniques employed to ensure the quality of a study (Rose & Johnson, 2020). Gunawan (2015) considers the following as important elements of trustworthiness: credibility which answers the question about how internally valid the study is or to what extent is the study about; dependability which is about how reliable the study is, and aspects such as member checking and peer checking are important; transferability which is about how close does the concept of the study relate externally; and, confirmability, which addresses the issue of presentation.

Validity of the data will be maintained through the following process:

- Prepare and organise data. Transcription of field notes.
- Review and explore data. Patterns or repeated ideas in the data that emerge will be noted.
- Create a system for data coding. Create a set of codes that could be used to classify the data that was obtained.
- Attaching codes to the data and using these codes to categorise responses in a spreadsheet.

- Identifying common themes in the responses and connecting codes into cohesive and overarching themes in accordance with the objectives of the study.

1.10 RESEARCH INSTRUMENT

The study shall make use of semi-structured interviews as its primary research method. The crucial aspect of this method is that it strikes a balance between structure and flexibility, enabling researchers to track variables while allowing respondents to elaborate on their experiences. Semi-structured interviews are generally recognised as offering significant value to qualitative studies because they provide ample opportunities for respondents to elaborate on experiences, thereby improving the quality of information acquired during research (Ruslin et al., 2022; Magaldi & Berler, 2020).

Compared to interview schedules and/or questionnaires, this method is more suited to research studies seeking to tap into more nuanced perspectives and experiences. This method is also adaptable during the interview process, making it suited to research studies focused on Human Capital Theory, Social Justice, and the Resource-Based View.

1.11 DATA ANALYSIS METHOD

This research will use Manual Thematic Analysis, following the six-stage model described by Braun & Clarke (2021). The choice of this method is informed by its systematic approach, which ensures a thorough construction of meaning from qualitative information. Inductive and deductive approaches to meaning construction will both be incorporated to ensure grounding in empirical information to fit into this study's conceptual framework developed within Human Capital Theory, Social Justice, and Resource-Based View perspectives.

The results will emerge from an intensive engagement with systematic coding, theme development, and the synthesis of these themes into patterns, ultimately culminating in the identification of personas to represent each distinct stakeholder view.

1.12 ETHICAL CONSIDERATIONS

1.12.1 Permission and informed consent

Approval of the research was given by the NWU Economic and Management Sciences Research Ethics Committee. Community leaders who served as gatekeepers gave access permissions for participants' assistance.

1.12.2 Anonymity

Findings were used without personal identifying information. Data were presented in a way that made it impossible to connect participants to their responses.

1.12.3 Confidentiality

Details of each participant were collected for research purposes, with strict privacy precautions in place. All participants were provided with a unique code for analysis, and only the researcher had access to the original identifying information. Ensuring confidentiality throughout the study.

1.12.4 POPIA Compliance

This research complied with the Protection of Personal Information Act (POPIA) 4 of 2013 (SA, 2013). All personal data was properly processed, stored securely, and used for research purposes only, with password-protected files. Data will be retained only for the period strictly required by NWU policy and will not be shared with third parties. Participants were aware of their rights to obtain, alter, or withdraw information at any time.

1.13 CHAPTER LAYOUT

Table 1.1: Chapter layout

Chapter One – Overview
The chapter provides background for the dissertation in a problem statement that captures the essence of the main issue: educational disparities in South Africa's labour market, particularly among matric-level employees and unemployed youth. It establishes the secondary and primary research questions and thereafter the study objectives, which revolve around exploring strategic HR and economic interventions to close the skills gap. Additionally, the chapter presents a broad introduction to the historical inequalities in South Africa's education system and the reasons behind them in the apartheid system, and their expressions today. The study's significance is also highlighted, clarifying its impact on academic literature, public policy, and real-world HR practice to counter unemployment and support inclusive economic growth.
Chapter Two – Literature review
The second chapter offers a critical literature synthesis on South African educational inequalities and their socio-economic implications. It begins with historicising the origins of apartheid education policies that entrenched structural disadvantage for the majority. The chapter continues to present the theoretical frameworks that frame the research, namely Human Capital Theory, Social Justice Theory, and the Resource-Based View (RBV), to establish the conceptual framework for analysis. Focus is also given to prevalent educational issues and skill development interventions in specific sectors, e.g., the insurance industry. The chapter offers an insight into the chief limitations of previous research, such as a limited focus on matric-level employees and a lack of scalable private-sector interventions, thereby increasing the need for the current study.
Chapter Three – Methodology
This chapter explains the research method design, specifying the philosophical position and qualitative approach employed in conducting research. Based on a critical paradigm, the research seeks to problematise systemic inequalities and to provide change-driven solutions. The chapter outlines the multiple-case study approach used to examine perspectives across sectors and explains why this design was selected over

other qualitative approaches. Data collection techniques, such as semi-structured interviewing and document analysis, are described in-depth, along with the rationale for purposive sampling. The coding, thematic analysis, and validity and reliability measures are also discussed. Finally, the ethical concerns are broached, including informed consent, participant anonymity, and the protection of vulnerable groups such as jobless youth.

Chapter Four – Discussion of findings

In this chapter, a systematic analysis and presentation of empirical data collected in interviews, focus groups, and relevant documents is undertaken. All data sources are analysed thematically, and differences and similarities in participants' responses are highlighted. The chapter is structured around significant themes that have emerged from the data, including barriers to qualification access, HR intervention attitudes, and corporate funding engagement. Quotations and a narrative overview are used to document findings, and participant voices are meaningfully incorporated into the analysis. This chapter not only documents descriptive findings but also clarifies these through earlier theoretical frameworks, connecting empirical observation to broader social and economic processes.

Chapter Five – Recommendations and Conclusion

This last chapter presents the study's findings and their implications for research, practice, and policy. It begins by providing an overview of the research findings and how they address the initial problem statement and research questions. It then makes some policy and practice suggestions to government departments, schools, and the private sector. These are offering full qualification access to matric-level personnel, such as corporate investment in education, and accelerating public-private partnerships. It also refers to the limitations of the research, such as sample size and time constraints, which can affect the generalisability of the results. Finally, it provides recommendations for future research, including follow-up studies on cross-sector financing models for young people's education and the longer-term outcomes of strategic HR interventions.

Source - Researcher's own

1.14 STUDY PLAN

Proposal Development and Approval (January – May 2025)

This initial phase will be devoted to finalising the research proposal, including completing the research objectives, questions, the study's theory, and the methodology. The proposal will be submitted to ethics approval and examination by the NWU Business School Research Ethics Committee. Feedback from supervisors and ethics committee members will be included to ensure the research is academic and ethical.

Recruitment and Data Collection (May – June 2025)

Participants will be recruited through purposive sampling upon getting ethical clearance. Matric-level workers, unemployed youth, HR managers, and policymakers will be identified from selected sectors. Semi-structured interviews, either virtual or face-to-face, will be conducted to collect data and incorporate geographical representation. Document analysis will also be conducted in this phase, by reviewing policy texts and institution-based reports.

Data Analysis (June – July 2025)

Once data collection is complete, the analysis will start using thematic analysis. Documents and interview transcripts will be systematically coded to identify dominant themes, patterns, and ideas. NVivo or similar qualitative software can be utilised to assist with data management and coding. The analysis will be grounded in the theoretical frameworks outlined in Chapter 2 and will connect findings to broader systemic issues.

Draft Report Writing (July – August 2025)

The dissertation will, at this stage, be written, beginning with the reporting of findings in Chapter 4 and continuing with embedding this information into the final discussion and conclusion in Chapter 5. Every chapter will also be discussed and reworked collaboratively with the research supervisor iteratively to strengthen coherence, rigour, and academic integrity.

Report Revisions and Final Submission (September – October 2025)

The final step will be to proofread and edit the entire dissertation based on the peer examiners' and supervisors' remarks. The completed dissertation will be submitted to the university on its timeline by October 2025.

1.15 LIMITATIONS OF THE RESEARCH

1. **Sample Size:** The sample size is limited since it's qualitative research. While in-depth interviews yield rich, context-relevant information, the population sample is methodically selected and comparatively smaller. It is thus inevitable that results won't be widely generalisable to the entire South African workforce due to its geographical, sectoral, and socio-economic diversity. Nevertheless, the research approach employed sacrifices breadth for depth and aims to reveal nuanced findings of unemployed youth and matric-level workers' lived experiences.
2. **Participant Bias:** Participant bias is a potential threat. Data collected is reliant on self-reported opinions, which may be influenced by personal beliefs, prior experience, or the researcher's expectations. Therefore, responses may reflect subjective opinion rather than objective measures of HR interventions or policy success. This will be minimised by triangulating evidence through documentary analysis and maintaining a reflexive stance throughout the research.
3. **Time Constraints:** The study is subject to a time constraint, with all phases from proposal acceptance through to final submission scheduled within a period of ten months. The rushed timeline could affect the depth of data collection and the capacity to maintain long-term engagement with participants or to support several stages of analysis. While research design has been developed to optimise efficiency and scholarly rigour, additional longitudinal approaches could yield a deeper understanding and higher-quality evidence of causality or effect. Despite the limitations, the research will likely make a major contribution to understanding and addressing South Africa's persistent skills shortage from a strategic HR and economic policy intervention perspective.

1.16 CHAPTER SUMMARY

Chapter one is an in-depth study that incorporates the introduction, background, problem statement, research objectives, and questions. This chapter also includes a preliminary review of the literature, the methodological approach, the research design, the population description, the study's demarcation, the instruments for data collection, the plan of analysis, the research timeline, and the chapter outline.

The next chapter will present a detailed literature review of the strategic, human resource, and economic perspectives on disparities in education within the South African labour force.

CHAPTER TWO

LITERATURE REVIEW

2.1 INTRODUCTION

Educational disparities in South Africa remain a major obstacle to building an equitable, skilled, and productive workforce. Although post-apartheid reforms over the last few decades have levelled the playing field for educational access, structural inequalities persist, especially for matric-level employees seeking to advance to higher qualifications and career trajectories. The persons frequently experience systemic constraints on advancement between short-course training or skills development programmes and a fully accredited qualification, which in one form or another does not afford them access to education, consequently resulting in a lack of economic mobility, productivity and contribution to national development in a wider sense (Van der Berg, 2002; Spaull, 2019).

The persistence of these disparities is not only an educational question – it is an issue at the heart of human resource management and economic policy. From an HR lens, programs including RPL pathways, apprenticeship work, and structured internships have risen to prominence as efforts to narrow skills gaps and improve employees' skill development through training. The RPL is especially interesting because it allows employees to connect their learning with formal qualifications, which, in an era of historically structured inequality, means that many workers come from fragmented or unconventional learning backgrounds (Noe et al., 2017).

Apprenticeships and internships also offer formalised workforce learning activities, working alongside formal education to build employability and useful skills for industry (industry-specific). In terms of economy-wise policy, the corporate requirements for skills development and incentives, organisational incentives for workplace training, and public-private partnerships (PPPs) are now key features of the national plans to reduce unemployment and meet job-skill deficit needs (Arndt et al., 2024; Swiss-South African Cooperation Initiative, 2024). PPPs have emerged as a coordinated approach to cooperation among government, industry, and civil society, seeking to pool resources, know-how, and infrastructure to deliver skills development programmes. Such

collaborations could reduce the costs and logistical barriers faced by lower-socioeconomic-status matric students and align educational progress with labour-market demands.

This literature review critically examines the South African educational context, focusing on HR and the economy. It aims to examine how strategic interventions improve skills among matric employees, dismantle systemic and individual impediments to progression, and ensure access to higher education and job opportunities for all.

2.2 RESEARCH QUESTIONS

The research has one main question and three secondary questions that will guide the literature review:

2.2.1 Main research question

How do matric employees and HR professionals perceive the capacity of strategic HR interventions (RPL pathways, apprenticeships, structured internships) to facilitate transitions from short-course training to full qualifications?

2.2.2 Secondary questions

- What systemic and individual barriers prevent matric employees from accessing higher qualifications through strategic HR interventions?
- What are stakeholder perceptions regarding the feasibility and potential impact of **economic policies** that mandate corporate funding for youth education across industries?
- What strategies can enhance **public-private partnerships** to support government-led education initiatives specifically for matric-level employees and unemployed youth?

The following section outlines the historical background of educational disparities and the current educational disparities that inform the literature review and guide the formulation of these questions.

2.3 CONTEXTUAL FOUNDATIONS: HISTORICAL AND CURRENT EDUCATIONAL DISPARITIES

2.3.1 Historical background of education disparities

The legacy of apartheid (1948–1994) profoundly shaped the South African educational system, causing structural inequalities that still impact access to, quality of and outcomes throughout education today. Education was subjected to segregation under apartheid, which was intentionally constructed to restrict black South Africans' access to resources, qualified teachers and learning infrastructure (Christie & McKinney, 2020b). At the end of apartheid, in 1994, almost two-thirds of black South African adults (ages 25 and over) had no primary school education. This stood in marked difference to the well-resourced white educational system, which had the advantage of large government investments, small classes and skilled educators (Van der Berg, 2002).

Poor rural and township schools also played a significant role, but they often operated in dilapidated conditions, with overcrowded classrooms and insufficient teaching resources. Such disparities created a generational cycle of educational underachievement, in which children from historically deprived communities struggled to acquire the skills needed for meaningful labour market participation (Spaull, 2019).

Post-apartheid reforms have attempted to address these disparities through the South African Schools Act of 1996 and subsequent policies, seeking to redress these inequities by integrating schools into a unified national system and standardising access to education (SA, 1998). Policies aimed to advance teacher quality, redistribute resources, and increase enrolment rates. However, despite these measures, residual disparities continue. Underqualified teachers, redundant curriculum, and inadequate learning resources continue to limit student success in many rural and township circumstances, constraining the transition of learners from school to higher education and the labour market (Taylor et al., 2015).

The historical inequities described above have direct implications for strategic HR interventions in the contemporary South African context. Matric-level employees entering the workforce often possess foundational skill deficits, particularly in literacy, numeracy, and digital competencies. Such gaps require interventions such as RPL pathways, apprenticeships and formalised internships to close the gap between short-term training

programmes and full qualifications (Swiss-South African Cooperation Initiative, 2024). The targeted interventions force workers to remain in low-skill, low-wage work, which exacerbates the cycles of underemployment and poverty.

Table 2.1 Historical Factors Affecting Matric Employees' Career Trajectories

Factor	Description	Impact on Transitions
Educational Background	NSC completion with variable quality; disparities between rural and urban schools	Reduces eligibility for RPL; necessitates bridging programmes (Taylor et al., 2015)
Employment Sector	Predominantly entry-level roles in manufacturing, retail, and services	Provides apprenticeship opportunities but risks underemployment (Swiss-South African Cooperation Initiative, 2024)
Socio-Economic Status	Low-income households; poverty cycles	Limits self-funded upskilling; heightens dependence on NSFAS (National Student Financial Aid Scheme, 2023)

Source: Researcher's own

This historical context, therefore, illustrates the need for two approaches: one focused on HR and the other on economic measures. From an HR perspective, there is a need for structured programmes that recognise prior learning and provide stepwise progression to more advanced qualifications. Economic policies that encourage employer-led skills development and provide public support to historically disadvantaged groups are essential for addressing systemic inequalities and expanding access to opportunity (Cunningham & Villaseñor, 2016; World Bank, 2004; World Bank, ILO & UNESCO, 2023; OECD, 2023; ILO, 2025)

2.3.2 Current educational disparities

There is a significant mismatch in South Africa's labour market between educational attainment and the workforce, contributing to difficulties in workforce development.

Overall unemployment is now high, at 31,9%, while youth unemployment (15-24 years old) is nearly 60%, reflecting acute skills mismatches and low levels of employability for learners (Stats SA, 2023a; Reddy et al., 2023). These gaps are exacerbated by the historical legacy of training during apartheid, with many pupils in historically disadvantaged locales undereducated for the demands of a challenging labour market.

Government initiatives, including Sector Education and Training Authority (SETA) programmes, sought to plug this gap, supporting some 1.2 million learners in 2023. These are important efforts, but far from sufficient levels for a youth population of over 20 million. The underutilisation of levy funds, combined with the patchwork nature of programme delivery, has limited the potential of national initiatives to respond to labour market requirements (National Planning Commission, 2023; Republic of South Africa, 1998). By funding programs, SETAs have a dual function: assisting in skill development and supervising employers' adherence to the SDA (SDA, 1998). However, structural inefficiencies and a lack of consistency in the provision or the uptake have hampered such systems. Private-sector assistance in skills development is also usually provided through short courses as part of B-BBEE compliance. Such programs provide some skills development opportunities but are often unaccredited, unlikely to be well-accredited, and not generally part of formal occupational pathways. As a result, employees who complete matric-level courses are frequently stuck in cycles of low-wage work with limited opportunities for success and career advancement (Reddy et al., 2023).

Different scholarly views underscore the complicated character of educational inequalities. Spaull (2019) locates the problem of educational inequality largely in the nature of learning, highlighting specific two-way performance relations between middle-to high-middle-income (MI) school leavers and pupils in quintiles 1–3. In contrast, Bhorat (2023) highlights labour-market structural rigidities, such as wage-setting mechanisms, limited economic growth, and sectoral imbalances, as the main factors behind poor employment outcomes. This view reiterates that interventions that address both educational quality and labour-market form should be effective. For the lowest-ranked workers, this creates specific obstacles, including insufficient access to training and expertise, insufficient hands-on workplace experience, and insufficient investment in lifelong learning. Structured internships, apprenticeships and Recognition of Prior Learning (RPL) pathways are therefore very important methods of creating such linkages

between education and work and providing both theoretical knowledge and practical skills that correspond to the demands of the workforce (Republic of South Africa, 1998; Draissi, et al., 2023a).

2.4 DISCUSSION OF RESEARCH QUESTIONS

The research questions, as stated in chapter one, are now discussed.

2.4.1 How do matric employees and HR professionals perceive the capacity of strategic HR interventions (RPL pathways, apprenticeships, structured internships) to facilitate transitions from short-course training to full qualifications?

2.4.1.1 *Strategic Human Resources Interventions*

Strategic human resource (HR) interventions are specific actions taken by an organisation to align employee development with broader business and national skills objectives. In the South African context, such interventions aim to shift from informal or short-duration training to fully accredited qualifications, particularly for matric-level workers who may enter the workforce with incomplete skills (Noe et al., 2017).

The legislative context for HR interventions is the Skills Development Act 97 of 1998 (SDA), which encourages the role of learnerships, Recognition of Prior Learning (RPL) pathways and structured internships. Such interventions are developed to enhance the employability of individuals, the competitiveness of the national economy and lessen the mismatch between the supply of labour and demand (Republic of South Africa, 1998).

2.4.1.2 *Recognition of Prior Learning (RPL) Pathways*

Recognition of Prior Learning (RPL) enables learners to be acknowledged for work-related learning (informal or short coursework) or workplace-based training. This approach saves students time and money in obtaining full qualifications and is particularly valuable for matric-level employees hoping to work in areas that require intermediate or advanced skills (McGrath, 2012).

Developing those pathways aligns with the NQF, which may enable employees to earn credits for occupational success and transition from short courses to diplomas to full certifications. Importantly, it has a disproportionate impact in the skills shortage sectors of the economy (for example, manufacturing, retail, and finance), where experience frequently outweighs academic credentials. Even more important, RPL encourages lifelong learning by recognising different learner contexts and providing a flexible pathway to qualifications for individuals shut out from traditional education pathways (Swiss-South African Cooperation Initiative, 2024) (Swiss-South African Cooperation Initiative, 2024).

2.4.1.3 Explanation of RPL Pathways

Recognition of Prior Learning is a formalised or defined process that enables the identification and validation of competencies, knowledge, and skills obtained through informal learning, work experience, or non-formal education, and that carry credits that can be converted into qualifications listed on the National Qualifications Framework (SAQA, 2019; SAQA, 2023). RPL pathways also allow workers, particularly those with no formal tertiary education, to gain access to an accredited qualification without necessarily having to start their training from scratch. This approach:

- Bridges gaps between practical experience and formal certification.
- Reduces duplication of learning and thereby accelerates career progression.

Supporting lifelong learning and workforce mobility. RPL, under the Skills Development Act 97 of 1998, is an important instrument for enhancing employability and a principle of equal access to education and training (Republic of South Africa, 1998; SAQA, 2019).

Table 2.2 Strategic HR Interventions for Matric Employees

Intervention	Definition	Key Features	Feasibility for Matric Employees
RPL Pathways	Assessment of informal/experiential knowledge for NQF credits	Portfolio-based; reduces study time	High: addresses experiential gaps in low-qualified workers (McGrath, 2012)
Apprenticeships	Structured learnerships combining workplace and institutional training	2–3 years; SETA-funded; trade tests	Medium-High: targets artisan shortages but requires employer commitment (National Planning Commission, 2012)
Structured Internships	Mentored, time-bound workplace placements leading to employment contracts	12–18 months; skills programmes	High: enhances employability through practical exposure (Moses et al., 2021)

Source: Researcher's own

2.4.1.4 *Apprenticeships and Learnerships*

Apprenticeships are formalised forms of learnerships in which workplace-based education meets institutional training to produce, at the most advanced stage, trade or occupational qualifications registered on the National Qualifications Framework (NQF) (ILO, 2022). Sector Education and Training Authorities (SETAs) are prescribed under the Skills Development Act 97 of 1998 to develop learnership agreements, fund projects through the levy-grant system, and check for adherence to their work (Republic of South Africa, 1998; CCMA, 2025).

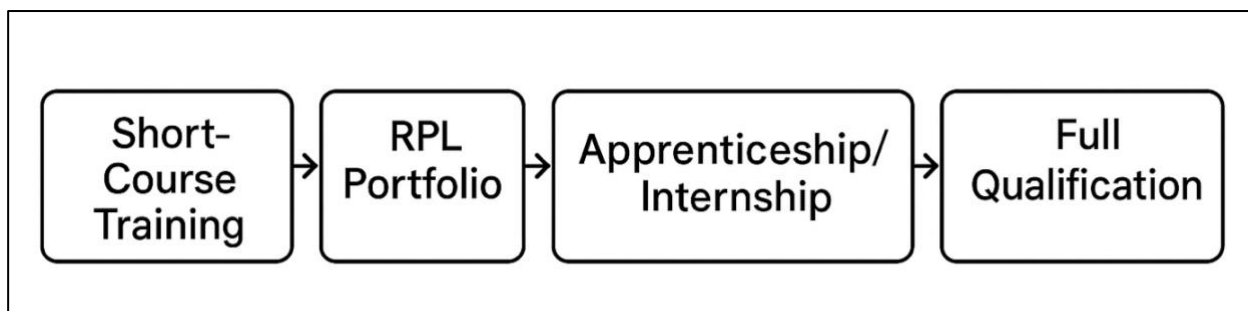
Apprenticeships are considered effective interventions for workers at the matric level, particularly for those with ongoing inadequate skills at the intermediate level, such as manufacturing, engineering, and emerging digital technologies (Career Indaba, 2025; MERSETA, 2024). Such programmes provide learners with practical skills alongside their theoretical knowledge, in line with the sector's workforce demands for greater employability. There are barriers to scaling up apprenticeships, including low employer engagement, uneven SETA support, and low awareness among matric-level employees and employers (Lexinteq, 2024; CCMA, 2025). The Swiss-South African Cooperation Initiative (SSACI) highlighted ongoing skills gaps in technical and vocational professions

and noted that apprenticeship solutions in South African workplaces need to be broader to enhance work-readiness and economic inclusion (SSACI, 2024).

2.4.1.5 *Structured Internships*

Internships are structured experience opportunities for matric-level employees, offering a mentored, time-bound work environment alongside formal vocational training programmes. These internships bridge the curriculum with industry relevance by developing practical knowledge, enhancing employability, and preparing students to obtain full qualifications (Moses et al., 2021). In addition, internships help meet the wider NDP goals of producing 30,000 artisans annually by 2030. By providing opportunities to embed work-integrated learning into career pathways, structured internships reduce the risk of a job-skill mismatch and enable matric-level employees to find sustainable employment (Örtenblad, 2020; National Planning Commission, 2012).

Figure 2.1: Pathways from Short-Course Training to Full Qualification



Sources: Researcher's own

This model illustrates how incremental HR interventions, aligned with NQF standards, can systematically upskill matric employees while simultaneously addressing individual skill gaps and systemic barriers. By integrating RPL, apprenticeships, and internships, HR strategies provide multiple entry and progression points, fostering both career development and national economic growth.

2.4.1.6 *Challenges in Implementation*

Barriers to wider utilisation of RPL, Apprenticeships and Internships. However, despite promising impacts on employability and the reduction of skills gaps, various systemic and structural challenges have prevented the wider adoption of Recognition of Prior Learning (RPL), skills-building apprenticeships, and structured internships in South Africa

(Govender, 2023). These barriers are multidimensional, and there is extensive literature and policy reports on these issues.

- **Awareness and Accessibility.** One of the most significant barriers is the lack of awareness among matric-level personnel, particularly in rural and previously disadvantaged areas. However, limited dissemination of programme information and a myriad of eligibility criteria make exclusionary practices a reality (Tywabi, 2023). Likewise, SAQA (2023) notes that, despite several RPL policies, implementation is uneven and fails to reach learners who would benefit most. Moses et al. (2021) also note that these problems are made worse by digital divides: application systems are shifting onto online platforms — often to the detriment of rural learners.
- **Employer engagement.** Employer involvement is essential to ensure the learner's prospects succeed on both the internship and experience side. However, staff participation is less. The SDA incentivises through levy-grant systems, but such schemes are viewed by businesses as a costly and cumbersome process (Republic of South Africa, 1998; CCMA, 2025). Lloyd and Bolton (2021) point out that small firms do not have the capabilities to deal with compliance requirements, and Urban-Econ (2024) says that employers have doubts over the ROI especially where workers need a great deal of mentoring prior to success.
- **Quality Assurance.** The quality measures and measurement tools of the programmes differ greatly across sectors. However, Lloyd and Bolton (2021) stated that inconsistent standards are detrimental, undermining the credibility of the RPL assessment and eroding trust between the employer and the RPL. Most SETAs are unable to provide quality assurance due to resource constraints (Urban-Econ, 2024). Still, the ILO (2022) calls for more formal arrangements with the industry and the institutes to confirm that the apprenticeship meets global best practices.
- **Alignment With Labour Market Needs.** Curriculum misalignment with industry requirements remains a persistent issue. Training programmes that anticipate technological and sectoral demands have been noted as a problem (National Planning Commission, 2012). SSACI (2024) supports this argument, stating that despite existing interventions, intermediate-level skills shortages in manufacturing

and digital technologies remain unabated. Borat (2023) provides a macroeconomic explanation, arguing that structural rigidities in the labour market, such as wage-setting mechanisms, exacerbate the condition, making skills interventions less effective unless combined with broader economic reforms.

- **Addressing the Challenges.** Academics and policy bodies are unanimous in calling for a response. ILO (2022) suggests employer incentives and simplified administrative management to encourage more participation. DHET (2024) recommends robust monitoring systems and curriculum updates to keep training relevant to new industry needs and emerging fieldwork. SAQA (2023) encourages targeted outreach to historically disadvantaged students and the underserved. Urban-Econ (2024) recommends implementing digital platforms to develop programme awareness and support applications.

2.4.2 What systemic and individual barriers prevent matric employees from accessing higher qualifications through strategic hr interventions?

2.4.2.1 Skills Mismatch in the South African Labour Market

Skill mismatch is one of the most long-standing and complex problems facing the South African labour market. The absence of skills is known as a skills mismatch, which occurs when workers' skills are not relevant to the job at hand, either underutilising or missing basic skills in the job category (Bhorat, 2023). This is particularly pressing for staff who, at matric-level, have unequal levels of instructional quality, restricted exposure to the “world” of the workplace, and access to structured pathways for training (Spaull, 2019; DHET, 2024). The problem is not confined to South Africa but is compounded by structural inequalities, South Africa’s apartheid-era education, and slow economic growth, which together limit the ability to efficiently absorb new entrants into the labour market (National Planning Commission, 2012; World Bank, 2020).

2.4.2.2 Understanding the Nature of Skills Mismatch

The Skills mismatch is a multidimensional problem with three main types of presentation:

1. Vertical Mismatch. It’s when a person is at a grade level that is either below or above what a job requires. For workers at the matric level, the issue is often a lack of formal qualifications to fill high-level positions (Bhorat, 2023). Weak articulation

channels from matric to vocational or tertiary education compound this mismatch, leaving many workers languishing in low-skilled roles (Tywabi, 2023).

2. **Horizontal Mismatch.** Happens when the fields in which a worker works do not match the jobs they perform. This is widespread among students taking generic short courses that do not align with industry-specific skills and often leave them ill-prepared for technical positions (Lloyd & Bolton, 2021). Employers frequently cite graduates who are unprepared with sector-specific skills, particularly those in new areas such as ICT and advanced manufacturing (SSACI, 2024).
3. **Skills Shortages.** Explains labour market shortages where demand outstrips supply. The shortfalls are particularly notable in intermediate and skilled sectors such as engineering, ICT, and healthcare (MERSETA, 2024). According to the ILO (2022), ongoing shortages negatively impact productivity and competitiveness, constraining South Africa's capacity to participate in global value chains.

2.4.2.3 Prevalence and Impact of Skills Mismatch

Bhorat (2023) estimates that approximately 40% of South African youth are in a state of vertical mismatch, in which they do not participate at higher levels of labour market engagement but are pushed into lower-level jobs that require more specialised skills, as reflected in more than 40% of youth. Horizontal mismatch is, as can be seen, an issue compounded by an influx of unaccredited, non-articulation short courses that frequently lead to learner exclusion from the high-skill, low-wage sector (Urban-Econ, 2024). The consequences of skills mismatch are many:

- **Underemployment:** Matric-level employees may take on jobs that require less skill than they possess, or work tasks that are not career-promoting.
- **Low Workforce Productivity:** There are performance and competitiveness gaps in labour force by the companies filling technical positions (ILO, 2022).
- **Stagnating wages (Bhorat, 2023):** Skill mismatch restricts earning potential and hinders upward mobility.
- **There is a lack of upskilling:** Weak training and preparedness for the job market in South Africa drives youth unemployment rates up to 60% (Stats SA, 2023b).

International comparisons indicate significant discrepancies, with high employer engagement and dual education systems in countries such as Germany and Switzerland associated with lower mismatch rates (ILO, 2022). South Africa’s piecemeal systems, by comparison, don’t fit together education, training, and labour.

2.4.2.4 *Linking Skills Mismatch to Research Questions*

The skills mismatch is closely related to the focus of the study, which is critical and relates equally to the main key questions addressed here for primary and secondary research purposes:

- **SQ1: Barriers to higher qualification access:** The issue of vertical mismatch stems from improper pathways to formal qualifications for matric students, underscoring the importance of RPL and apprenticeship interventions.
- **SQ2: Feasibility of corporate funding mechanisms:** Skills shortages make a further case for greater levy systems and stronger private-sector participation in funding higher-impact programs.
- **SQ3: The role of PPPs in reducing mismatch:** Horizontal mismatch can be addressed by public-private partnerships that ensure training is sector-specific and relevant (SSACI, 2024; DHET, 2024).

Table 2.3 Types of Skills Mismatches

Type	Description	Prevalence	Link to Research Questions
Vertical	Employees lack the required qualification level	Very high; - 40% youth	Highlights barriers to RPL/apprenticeships (SQ1)
Horizontal	Skills misaligned with job requirements	Medium	Supports need for PPP-aligned internships (Primary Q, SQ3)
Skills Shortages	Supply-demand gap in critical jobs	High in intermediate roles	Justifies corporate funding interventions (SQ2)

Source: Researcher’s own

2.4.2.5 *Structural Drivers of Skills Mismatch*

A closer look shows that skills mismatch in South Africa is more than individual choice on an individual level and is the product of a combination of structural, institutional and educational factors that reinforce systemic unfairness, as well as a lack of flexibility to a given labour market.

a) Educational Quality and Inequity

There are continued differences in quality, especially in schools in quintiles 1–3, and the resulting underdevelopment of critical literacy, numeracy, and problem-solving skills among matriculants has also been reported (Spaull, 2019). These skill deficits severely limit their access to and achievement of higher-level or vocational training or pathways. According to Bhorat (2023), poor educational outcomes create a bottleneck effect, in which learners enter the job market with insufficient cognitive/technical skills, thereby exacerbating the vertical mismatch.

b) Weak Vocational Training Pathways

South Africa's TVET (Technical and Vocational Education and Training) system has faced limitations over time, including low completion rates, sporadic funding, and limited alignment with industry (DHET, 2024). Urban-Econ (2024) indicates that most TVET college systems lack technological upgrading and skilled personnel in their infrastructure, resulting in programmes that do not meet employer standards. On the other hand, international models such as the dual system in Germany demonstrate that strong employer-college partnerships are indispensable to the success of mismatch reduction measures (ILO, 2022).

c) Labour Market Rigidity

In some respects, these arrangements exacerbate the mismatch by setting wages through systems that restrict hiring and keep the economy stagnating (National Planning Commission, 2012). Bhorat (2023) notes that firm-level wage floors and union-based bargaining are among the factors that discouraged companies from hiring inexperienced young people, despite the availability of training subsidies. Such inflexible measures are restricting early entry opportunities and continued youth unemployment.

d) Limited Employer Participation

Employer involvement in skills development is variable. Too many organisations lack the framework or incentives to offer apprenticeships, internships, or specific entry-level training (CCMA, 2025). According to Lloyd and Bolton (2021), approaches focused on compliance, such as the B-BBEE scorecard (B-BBEE requirements), reward short courses rather than long-term learning pathways, which ultimately have adverse effects on employability.

2.4.2.6 *Addressing Skills Mismatch Through Strategic HR and Economic Interventions*

Management of skills mismatch through strategic HR and economic steps. Talent gaps cannot be bridged by one-time interventions. It needs a more complex approach to address, including: RPL pathways to tackle skills shortages and acknowledge past learning (SAQA, 2023). Apprenticeships and student programmes addressing occupational shortfalls in fields including ICT, engineering, and manufacturing (MERSETA, 2024).

Facilitated internships offering mentored, time-limited exposure to work opportunities in the workplace to connect theory and practice (Moses et al., 2021). Economic supports for employer involvement through tax breaks or improved B-BBEE recognition (DHET, 2024). Fierce public-private partnerships (PPPs) to align training with labour market demands, and guarantee curriculum relevancy (SSACI, 2024). If not addressed in these areas at a national level with robust governance mechanisms, the Skills Gap Report by the Swiss-South African Cooperation Initiative (SSACI, 2024) has a strong indication that the challenges of intermediate skills deficit, especially in manufacturing, retailing, ICT and financial care, are not going away.

2.4.2.7 *Youth Unemployment and Educational Disparities*

Youth unemployment is now one of South Africa's greatest socio-economic troubles, with youth unemployment standing at almost 60% with a 15 to 34 age group as the most vulnerable (Stats SA, 2023b). It is among the highest rates worldwide and reflects systemic weaknesses in the country's education-to-employment pipeline. A large part of unemployed youth only has a matric certificate, highlighting structural gaps in the

transition from school to work (Hlatshwayo, 2022). These fractures are rooted in previous inequalities in the quality of schooling, limited access to post-school opportunities, inadequate articulation between short courses and formal qualifications, and a chronic mismatch between acquired skills and labour market demand (Spaull, 2019; Van der Berg, 2002).

The challenge is a serious one compared to other parts of the world. Although Germany and Switzerland maintain youth unemployment levels below 10% (with strong vocational structures and apprenticeships provided by employers) this still indicates a fragmented method of addressing unemployment. The fragmented approach in South Africa lacks coherence and scale (ILO, 2022). This divergence points to the importance of systemic reform more than individual interventions.

2.4.2.8 Types and Causes of Youth Unemployment

Youth unemployment in South Africa is manifested in three intersecting forms and is determined and shaped by the three complex educational and labour market factors:

1. **Frictional unemployment:** Frictional unemployment refers to temporary unemployment during periods of job search. Frictional unemployment is particularly prolonged among matric-level youth and is attributed to a lack of skills related to occupations and limited entry-level jobs available (Hlatshwayo, 2022). Moses et al. (2021) suggest that structured internships and RPL routes can help lower friction and increase employability and visibility in the job market. But uptake is weak, partly due to low levels of employer involvement and insufficient awareness campaigns.
2. **Structural unemployment:** Structural unemployment occurs when the skills people have do not align with what the industry demands. Matric-level job seekers trained mainly in general or humanities subjects struggle to tap into lucrative, fast-growing industries, including digital services, finance, and technical trades (National Planning Commission, 2023). SSACI (2024) states that the lack of targeted upskilling and apprenticeships will lead to continuing intermediate skills shortages and continue to stifle economic growth. This type of unemployment is particularly damaging because it reveals systemic deficits in the way our education system is reflected in the labour market.

3. **Cyclical unemployment:** Cyclical unemployment is driven by wider economic trends, including in recessionary periods, contraction by sector, and post-COVID demand fluctuations. Matric-level employees, who usually hold low-skilled occupations, are the ones most affected by such cycles (Odondi, 2024). Public-private training programmes, more extensive levy utilisation and lifelong learning at the workplace can reduce the impact of cyclic recession but these necessitate ongoing resources and policy collaboration as well (ILO, 2022).

2.4.2.9 Implications for Policy and HR Interventions

The scale of youth unemployment calls for integrated, evidence-based responses aligned with national development efforts. RPL, apprenticeships, and structured internships address both frictional and structural unemployment by providing clear and progressive avenues to skilled employment (Republic of South Africa, 1998; Moses et al., 2021). The National Development Plan (2012) provides ambitious targets, aiming for an average of 30,000 artisans each year and 1 million learnerships by 2030, to inform the monitoring and evaluation of interventions. Promoting HR practices aligned with these targets increases the likelihood that matric-level youth can move from brief, unaccredited study to meaningful, long-term employment (DHET, 2024).

2.4.3 What are stakeholder perceptions regarding the feasibility and potential impact of economic policies that mandate corporate funding for youth education across industries?

2.4.3.1 Economic Policies Frameworks, Skills Development in South Africa and Corporate Funding

Economic policy frameworks are a decisive factor in the scale, sustainability and effectiveness of skills programs aimed at employees with no more than a matric qualification or unemployed youth. In South Africa, the frameworks underpinning these programs are based on laws like the Skills Development Act (1998) as well as the Skills Development Levies Act, which introduced a levy-grant structure to promote in-house workforce development, while supporting the national skills agenda (Republic of South Africa, 1998; SARS, 2025). Employers pay 1% of their payroll as a Skills Development Levy (SDL), which is paid out through SETAs and the National Skills Fund (NSF) to support learnerships, apprenticeships, and bursary schemes (SARS, 2025; DHET, 2024).

These instruments cover three key areas of human capital: the development of individuals; the creation of skills necessary for jobs; and an industry's growth through the promotion and development of new technologies. Financial levers such as tax incentives, discretionary grants, and PPP have been turned on their head. For instance, by means of the Employment Tax Incentive (ETI) there are incentives provided for employers to employ young workers if PAYE liabilities are reduced and discretionary grants in the SETA fund sectoral train people (MQA, 2024; DHET, 2024). Scholars and policy analysts stress recurring problems in ensuring these tools can better serve labour market requirements.

The World Bank (2020) attributes these inefficiencies in levy utilisation and weak monitoring systems to hindrances that hinder the sector's ability to cater to industry's needs, thereby rendering the training programmes irrelevant. Similarly, SSACI (2024) contends that funding is available, but programme design does not necessarily anticipate when a technology change will occur, leaving graduates unprepared for newly emerging fields such as digital technologies. Nagalingam (2017) also presents an economic perspective and observes that although SDL contributions positively correlate with economic growth, training programmes have not led to increased productivity because they have not responded to occupational demands. The big problem is ensuring these economic tools are properly funded and focused. This will be facilitated through concerted policy action, improved accountability structures and flexible approaches that can respond to demand for highly sought-after occupations (DHET, 2024; NSDS III, 2017). Without such alignment, financial incentives risk maintaining fragmented interventions rather than achieving systemic impact on employment and equity.

2.4.3.2 The Current Skills Development Levy System and Its Limitations

Large Underpinning South Africa's approach to skills development is the 1% Skills Development Levy (SDL), administered by the South African Revenue Service (SARS) and funding Sector Education and Training Authorities (SETAs) under the Skills Development Levies Act. This levy was first envisioned as a vital vehicle for growing structured training opportunities, especially for employees with minimal formal schooling or experience (Republic of South Africa, 1998; SARS, 2025). Employers pay 1% of their payroll to help fund learnerships, apprenticeships and workplace-integrated learning programmes via mandatory and discretionary grants (DHET, 2024). However, figures

from the Department of Higher Education and Training (DHET) show that a large share of levy funding goes to short skills courses rather than to obtaining full qualifications or structured workplace learning (DHET, 2022). Although short courses may have compliance and introductory training dimensions, few create opportunities for matric workers to advance (Urban-Econ, 2024). Moses et al. (2021) claim that many such programmes lack depth and that their pathways to workplace qualifications limit their transformative nature.

Larger organisations often focus on short-course delivery frameworks (Lloyd & Bolton, 2021) to meet the requirements of the Broad-Based Black Economic Empowerment (B-BBEE) scorecard, mainly in relation to the skills development aspect, rather than using levy funds to make the overall learning pathways available. A result of a lack of interrelated and inter-agency collaboration in these fields is fragmented approaches to intervention that fall short of meeting intermediate or advanced skill shortages in key areas such as engineering and digital technologies (SSACI, 2024). On the economic view, Nagalingam (2017) adds yet another perspective (that SDL helps stimulate training, but as it is misaligned with the labour market needs, the effectiveness of SDL contributions to enhance productivity and employability is nevertheless weak, hence its lack of impact. The consequence was a reduction in the SDL's capacity to deliver upskilling projects on a large scale and sustainably. Various scholars and policy institutions recommend reforms to ensure levy funds are used for high-impact programmes, including apprenticeships, structured internships, and prior learning pathways, that connect theoretical learning with practical experience (ILO, 2022; DHET, 2024).

2.4.3.3 The Case for Expanding Corporate Funding Mechanisms

Recent research has also suggested that, as a starting point, the levy system is not enough to narrow the growing disconnect between the needs of the labour market and the outputs of education. Arndt et al. (2024) recommend rethinking the funding architecture so that corporations from all industries (not just high-capacity industries, such as mining and finance) are required to, and/or strongly incentivised to, participate more in vocational and technical training. This view aligns with international best practice to provide diversity of funding streams, by which resources are offset from state budgets and, in return, funds have a longer-term investment trajectory, enhancing skills

development capacity (ILO, 2022). The logic of the increased contributions is economic. Enhanced labour productivity, increased employment and lower unemployment are repeatedly associated with economies that effectively scale up their vocational training systems (World Bank, 2020). Bhorat et al. (2023) argue that substantial investments in skills development can yield significant long-run GDP growth by improving labour-market efficiency and competitiveness in globally integrated sectors, including finance, insurance, retail, and digital services.

In another instance, Nagalingam (2017) describes corporate investment in skills as having a multiplier effect, increasing innovation at firms and sectoral robustness. Yet views on implementation strategies vary. Arndt et al. (2024) advocate mandatory contributions beyond the 1% levy, and Lloyd and Bolton (2021) warn that excessive compulsion would discourage compliance, leading to tokenistic responses. They would rather call for performance-based and performance-linked incentives, such as tax reductions, or preferential procurement for companies with a clear case of investment in accredited training programmes. Funding models that value high-impact programmes like apprenticeships and structured internships more strongly than short courses that primarily fulfil compliance needs (SSACI, 2024). International comparisons lend further credence to this claim. Countries such as Germany and Switzerland have benefited from dual funding models. Their employer contributions have been combined with state subsidies, resulting in robust apprenticeship networks able to withstand the strain (ILO, 2022). All these models show that corporate funding can drastically amplify both the scale and quality of vocational education when properly designed in line with its strategic structures.

2.4.3.4 Lessons from Sector-Specific Case Studies

Several targeted corporate funding initiatives can deliver measurable results, but there are limitations, as seen in sector-specific initiatives. The mining industry, for instance, has thrived with structured bursary schemes and internship pipelines, graduating engineers, geologists and artisans. But such success is still largely due to regulatory obligations and the industry's financial capacity (MQA, 2024). In contrast, the financial services sector has expanded graduate programmes and learnerships alongside NQF qualifications. However, participation by matric-level youth remains limited due to the rigorous academic entry requirements and intense competition for placements (BankSETA, 2024). Public-private partnerships, such as the Swiss-South African Cooperation Initiative (SSACI),

have piloted apprenticeship models tailored to employer needs and have been highly successful in improving work-readiness. Still, these initiatives are at a low scale and not completely integrated into SETA systems, limiting their systemic impact (SSACI, 2024). Taken together, they confirm that targeted funding is also economically viable. However, the lack of a national framework that encourages cross-industry collaboration and sustained financial backing reflects the failure to address the shortage of funds for sustainable economic development (DHET, 2024).

2.4.3.5 *Feasibility and Stakeholder Perceptions*

Stakeholder sentiment is also crucial when envisioning the scale of corporate money injection programs. Interviews and dialogue with corporate heads, HR managers, SETA professionals, and policymakers suggest tentative support for additional funding, provided there are sufficient incentives and simplified processes (Urban-Econ, 2024). Key findings emerging from stakeholder consultations include:

a) Incentives as a Critical Precondition

Organisations are more likely to offer longer-term funding arrangements if they are linked to:

- Tax breaks for eligible training expenses, thus relieving net financial costs.
- Increased B-BBEE scorecard eligibility, especially for sponsoring accredited qualifications or apprenticeships.
- Streamlined bureaucratic requirements, overcoming worries of administrative complexity associated with SETA submissions (Lloyd & Bolton, 2021).

b) Hybrid Funding as a More Sustainable Model

NSFAS (2023) provides evidence that government-generated funds will have difficulty funding upskilling for both matric-level learners and unemployed youth in the future. Consequently, all stakeholders endorse a hybrid funding model, including:

- Public allocations
- SETA grants
- Corporate contributions
- Employer-sponsored bursaries and scholarships
- Industry-wide pooled funds

This mixed approach is considered more resilient and thus scalable in the context of programmes during economic recession (DHET, 2024).

c) Operational and Governance Challenges

Notwithstanding popular backing, some governance issues remain:

- Responsibility for the use of levy funds - Alleviating the variation of the SETA governance system
- Reducing corruption and misappropriation of resources
- Strengthening monitoring and evaluation systems
- Making funding tied directly to the shortage in priority skills

These challenges shape perceptions of feasibility and demonstrate the importance of strong governance frameworks to underpin such policy expansion (ILO, 2022; Urban-Econ, 2024).

Table 2.4 Economic Policy Instruments for Matric-Level Upskilling

Instrument	Description	Potential Impact	Challenges
Expanded Skills Levy	Increasing corporate contributions to SETAs	Supports large-scale vocational training, apprenticeships, and RPL pathways	Risk of resistance from employers; need for incentives
Tax Incentives	Rebates for organisations investing in accredited youth training	Encourages private-sector involvement; reduces employer costs	Complex administration; oversight concerns
Public-Private Bursaries	Collaborative funding between NSFAS, SETAs, and employers	Reduces financial exclusion for low-income workers; supports full qualifications	Low uptake; restrictive eligibility criteria
Industry Training Funds	Sector-based pooled funding for scarce skills	Enhances alignment with industry needs; promotes standardised training	Requires strong governance; dependent on sector cooperation
PPP Training Academies	Joint training centres shared across employers	Improves the quality and consistency of practical training	Requires long-term capital investment

Source: Researcher's own

2.4.4 What strategies can enhance public-private partnerships to support government-led education initiatives specifically for matric-level employees and unemployed youth?

2.4.4.1 *Public-Private Partnerships (Ppps) For Education and Skills Development*

Public-private partnerships refer to mutual agreements between the government and the private sector, whereby a government department, such as the Department of Higher Education and Training, the National Skills Fund, or Sector Education and Training Authorities, develops links with private sector organisations to co-design, co-finance, and co-implement skills development interventions. Such associations help design, finance and develop training efforts. Public-private partnerships (PPPs) are mutual arrangements between the private sector and government. Through these, government departments (Department of Higher Education and Training (DHET), National Skills Fund (NSF), Sector Education and Training Authorities (SETAs)) establish links with private sector organisations to plan, finance, and carry out skills development activities. For those working at the matric level or young unemployed people, PPPs also serve as a form of infrastructure investment that provides accredited training, workplace learning, and sector-related capabilities more generally (Republic of South Africa, 1998). In recent years, PPPs have become a central part of global workforce development strategies. Germany, Switzerland, and Singapore have also been shown to lead structured state-industry collaboration to reduce skill mismatches and enhance youth employment (ILO, 2022). While promising, South Africa's PPP framework remains fragmented and underutilised (DHET, 2024); thus, greater governance and accountability, as well as alignment with labour market intelligence, would be beneficial. 1998).

2.4.4.2 *Governance and Funding Mechanisms*

There are already regulations governing PPPs' skills development. Such a governance mechanism involves SETA chambers, convened by industry representatives, labour unions, and educational institutions, that provide guidelines on programme design, funding approval, and quality checks (Urban-Econ, 2024). Most funding sources are from the following: Skills Development Levy (SDL): a mandatory 1% payroll contribution collected by SARS and distributed amongst the SETAs. Strategic projects for priority skills national skills fund (NSF) allocations. Investment from corporates, often associated with

B-BBEE compliance and corporate social responsibility initiatives (DHET, 2022). Properly developed PPPs use such resources to scale provision in priority regions, including technical trades, digital literacy, and finance, to support matric staff who are on track from short courses to an NQF-aligned qualification (SSACI, 2024).

2.4.4.3 Monitoring and Evaluation

Monitoring and evaluation (M&E) are needed to assess the actual contribution of PPP-led projects to measurable labour force outcomes. The key indicators include: RPL uptake. Internship placements. Learnership completions. Employment absorption rates. Monitoring these metrics helps both policymakers and HR managers assess the effectiveness of programme implementation plans and adapt intervention strategies accordingly (Draissi et al., 2023b). Effective PPPs depend on demand-led frameworks that leverage real-time labour market intelligence to train the workforce strategically and minimise the risk of skill oversupply and skill mismatch over the programme period (SSACI, 2024). Even so, poor M&E frameworks and irregular SETA governance pose significant hurdles, leading to scattered interventions and unclear accountability (Urban-Econ, 2024).

2.4.4.4 Strategies for Strengthening PPPs

Several evidence-based strategies aimed at expanding the effectiveness and outreach of PPP initiatives are identified in the literature as methods to increase their impact and reach.

1. Joint NSF–SETA Initiatives

Co-funded projects help fill financial gaps in RPL, internships and apprenticeships, especially among unemployed youth and for these groups is one way (National Planning Commission, 2012).

2. Industry-Led Demand Forecasting

Employers provide sector-specific skills data to allow for targeted responses to existing skill shortages, coupled with ongoing areas for growth (SSACI, 2024).

3. Integrated Workplace-Based Learning Models

Models utilising a combination of bursaries, loans and guaranteed work

experience increase employability and retention and reduce dropout for matric-level learners (NSFAS, 2023).

4. Using digital platforms for PPP coordination

Integrating technology that simplifies programme administration, facilitates tracking learner progress (e.g., how students achieve and progress with the learners), and enables employer engagement (DHET, 2024) enables the flexibility of technology, which would then facilitate the scale up and transparency of a programme.

5. Performance-Linked Incentives

Tax rebates and greater recognition of employers' investment in accredited training pathways on the B-BBEE scorecard can increase participation (Lloyd & Bolton, 2021).

Table 2.5 Factors Influencing Effective PPPs

Factor	Description	Challenges	Enhancement Strategies
Governance	Multi-stakeholder decision-making and oversight	Fragmented SETA structures	Unified chambers and joint planning (DHET, 2022)
Funding	Combined levies and corporate co-investment	Low absorption of available funds	Mandated multi-sector contributions (Arndt et al., 2024)
Monitoring	Outcome tracking, reporting, and evaluation	Inconsistent data collection and weak evaluation systems	Demand-led, evidence-based frameworks (Draissi et al., 2023a)

Sources: Researcher's own

2.5 INTEGRATIVE ANALYSIS

It shows how historical, human resource, and economic perspectives have been synthesised to depict the extent of interdependence between educational inequalities and

labour-market inefficiencies in South Africa. Apartheid-era schooling in South Africa has left legacies of uneven learning outcomes and the inability of matric-level workers to transition to higher qualifications and skilled occupations (Van der Berg, 2002; Spaull, 2019). Such structural disadvantages demand strategic HR interventions as outlets for redress

2.5.1 Educational Foundations and Structural Barriers.

The systematic deficiencies in literacy, numeracy, and problem-solving skills of pupils, especially those in quintiles 1–3, have resulted from historical disparities in the quality of schooling. Amar and his colleagues have highlighted the lack of workforce composition or focus, and this results in a mismatch that manifests as vertical mismatch (matric-level employees are missing the qualifications needed for skilled roles), and horizontal mismatch, generic short courses failing to coincide with particular industry/situational/industry-related competencies (Spaull, 2019; Lloyd & Bolton, 2021). In the absence of targeted intervention, these mismatches reinforce patterns of underemployment and wage stagnation.

2.5.2 Role of Strategic HR Interventions

Recognised Prior Learning (RPL), apprenticeships, and structured internships provide formal, NQF-oriented progression paths that facilitate mobility, acknowledge and celebrate learning, and further access to technical and professional opportunities (McGrath, 2012; Moses et al., 2021). These interventions provide a link between theory and practice by offering new sector-specific skills and avoiding frictional unemployment of the matric level. But their effectiveness depends on scalability, employer buy-in, and alignment with labour market intelligence.

2.5.3 Economic Policy Instruments as Catalysts

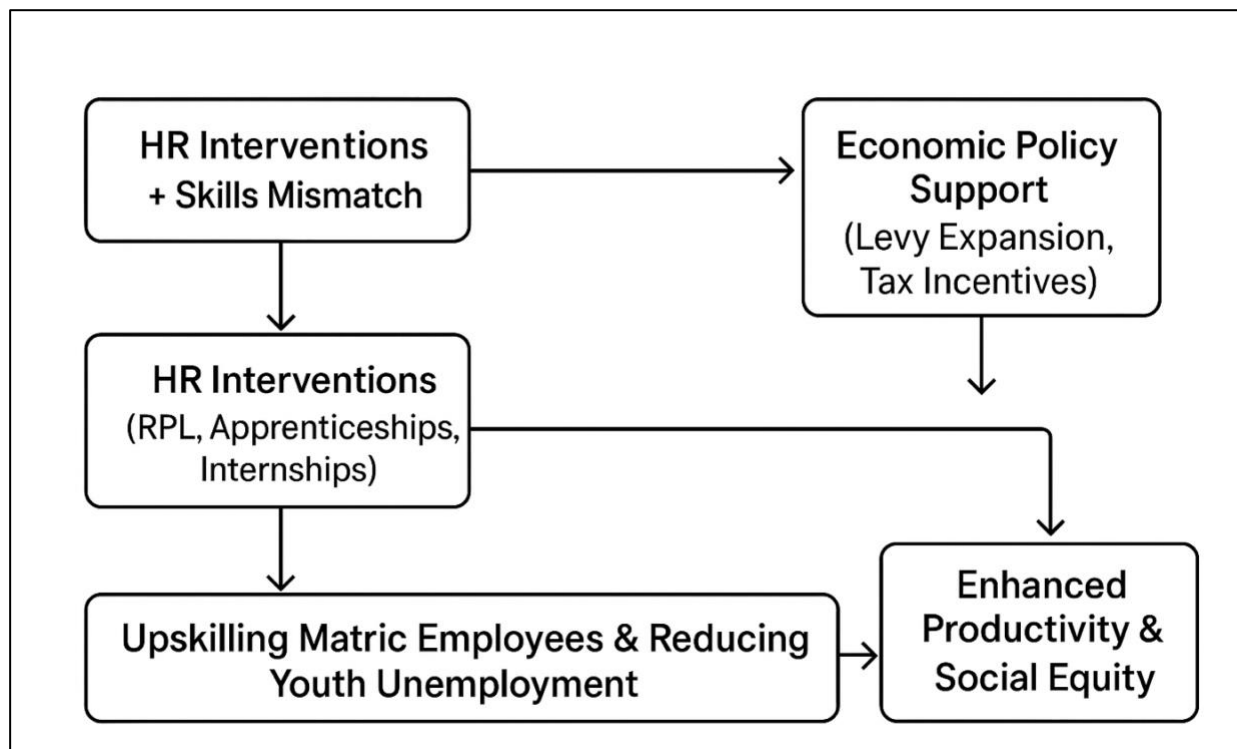
HR-led solutions are enhanced by economic policy tools; business tools augment their effectiveness and scalability. Encouraging corporate funding and extending levy-based finance by capitalising on corporate capital accumulation, as well as through sector-specific tax incentives and tax breaks, increases organisations' ability to invest in skill-building training for matric workers (Arndt et al., 2024; Bhorat, 2022a). Together with workplace-based learning, these economic supports reduce financial constraints and

enhance the durability of upskilling pathways. From experience in international best practice, hybrid funding approaches: hybrid financing (combined public funds, levy resources, and private income) is a necessity for resilient adaptation to financial crises (ILO, 2022).

2.5.4 Public-Private Partnerships as Integrative Mechanisms

Public-private partnerships (PPPs) act as a central integrative mechanism in this ecosystem. By consolidating resources, expertise, and institutional expectations from governments and industrial sectors, PPPs support coordinated efforts to tackle systemic barriers, enabling policy and industry to meet labour market demand (SSACI, 2024). The collaboration enables skills development programmes to be financed efficiently, while also responding to changes in industry demand and minimising spillovers or mismatches. PPPs also enable a demand-led training model, in which employer-generated data informs curriculum design and programme delivery. Policy Implications and Practice. The integrative study emphasises that a single intervention is inadequate. Sustainable solutions are those that: Their collaborative nature ensures that skills development programmes are not only well-funded but also responsive to evolving sectoral requirements.

Figure 2.2 Integrative Model of Strategic HR, Economic Policies, and PPPs



Sources: Researcher's own

This model illustrates the intertwining nature of historical context, HR strategy, economic policy, and institutional cooperation. It also reflects a systems approach, whereby:

Educational disparities (historical context) create the need for HR interventions. Economic policy instruments (levy systems, tax incentives) also support scalability and sustainability. PPPs enable institutional collaboration aligned with labour market demand. development. A combination of these components will enable South Africa to reduce educational inequalities, increase labour market inclusiveness, and ensure higher long-term workforce growth. In other words, it is consistent with the NDP targets and global best practice related to inclusive growth.

2.6 CONCEPTUAL FRAMEWORK

The framework is intended to align with the study's key concepts, including strategic interventions, mediating factors, and socio-economic effects. It demonstrates the congruence between the research questions and theories developed from the literature. This model illustrates how past educational disparities, together with labour market

weaknesses, call for a multifaceted approach that includes HR interventions, economic policy instruments, and institutional cooperation.

2.6.1 Framework Components

1. Independent Variables

Those are the main interventions meant to help the staff on a matric-level and the unemployed workers:

- **Strategic HR Interventions:** RPL, apprenticeships, structured internships.
- **Economic Policies:** corporate funding mechanisms, levy incentives, and tax-related support for workplace learning.
- **Public-Private Partnerships:** governance structures, co-funding arrangements, and monitoring mechanisms enabling coordinated implementation.

2. Mediating Variables

These variables govern, or shape, the association between interventions and outcomes:

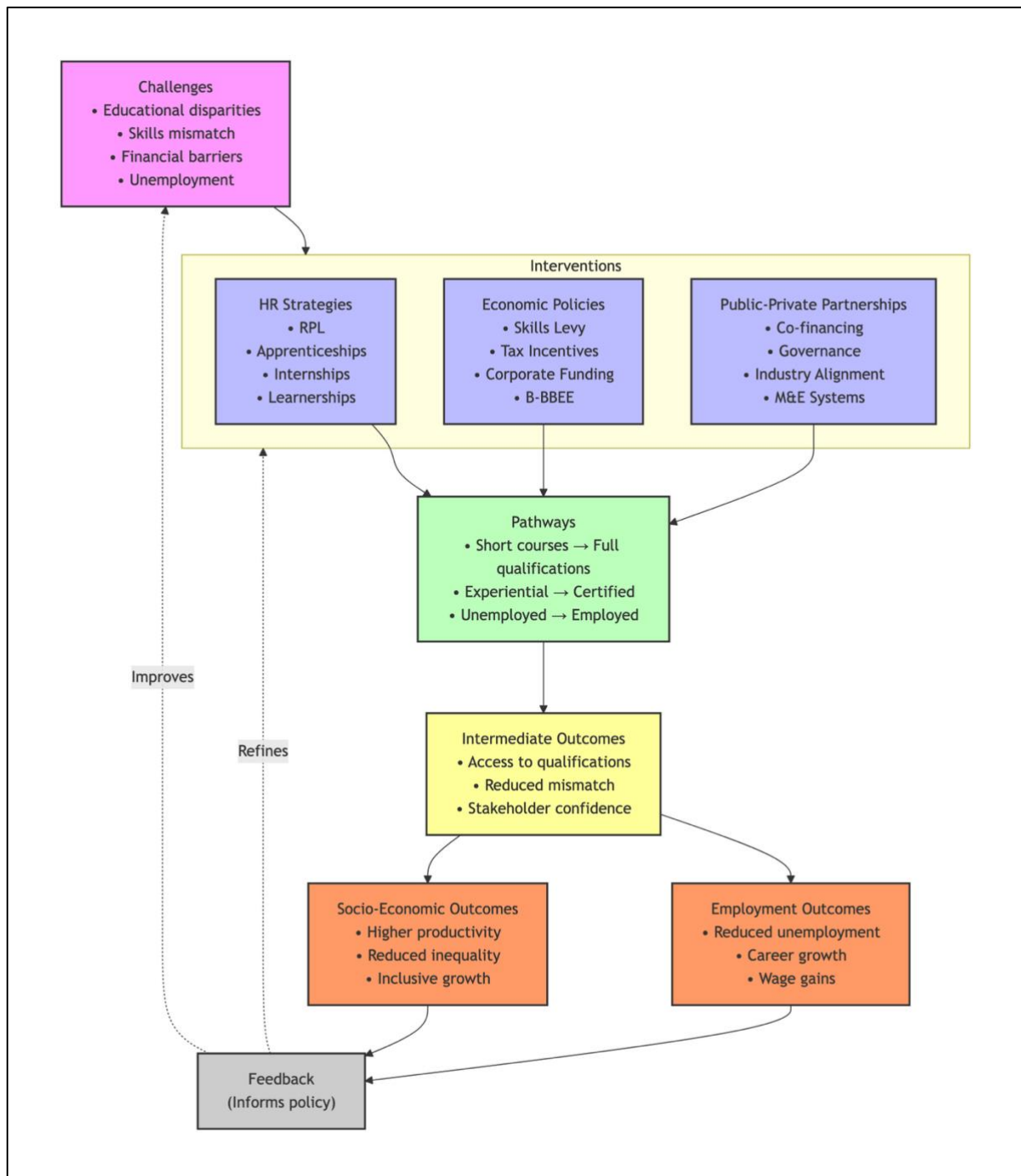
- HR professionals and matric employees' perceptions and experiences of which programmes are attainable and relevant.
- Access to higher education and credentials - which lead to transition out of matric.
- Adoption or quality of workplace-embedded learning opportunities that are tailored to industry necessities.

3. Dependent Variables

The outcomes that indicate the effectiveness of interventions:

- Skills mismatch has reduced between priority sectors.
- Employment outcomes are better for matric employees and young people.
- National productivity, inclusive growth, and social equity.

Figure 2.3 An Integrated Model for Addressing Educational Disparities



Source: Researchers' own

- The framework demonstrates the joint impact of strategic HRM processes, positive economic policies and cooperative PPP approaches in determining educational and labour market pathways. Combined, these interconnected factors help the matric level employee achieve full qualification from participation in short curricula,

with the aim of reducing youth unemployment and achieving positive socio-economic outcomes. **Challenges** (disparities, mismatch, barriers, unemployment) create need for action

- **Three interventions** work together: HR strategies (RPL, apprenticeships, internships), economic policies (levies, tax incentives, corporate funding), and PPPs (co-financing, governance, alignment)
- **Pathways** translate interventions into progression routes (short courses→qualifications, experiential→certified, unemployed→employed)
- **Intermediate outcomes** (access, reduced mismatch, confidence) lead to **final outcomes** (employment gains + socio-economic benefits)
- **Feedback loop** enables continuous improvement

Core Insight: HR, economic, and PPP interventions must work synergistically not in isolation to create sustainable pathways from educational disadvantage to meaningful employment.

2.5.2 Conclusion and Synthesis

This study set out to examine how strategic human resource (HR) and economic interventions can lessen educational disparities faced by matric-level employees and unemployed youth in South Africa, ultimately improving skills development, employability, and equity. Guided by the research objectives and questions, the chapter integrated a wide-ranging review of historical education inequalities, the current skills landscape, HR-led interventions, economic policy mechanisms, public-private partnerships (PPPs), and multi-sector case studies. Together, these elements form a comprehensive understanding of how structural and organisational interventions can reshape education-to-employment pathways.

2.6.2 Synthesis Across Themes

2.6.2.2 *Historical and Current Educational Disparities*

Historical inequities rooted in apartheid-era underfunding continue to shape educational outcomes, with schools in previously disadvantaged communities still reporting weaker

matric results and poorer preparation for post-school education (Van der Berg, 2002; Christie, 2020). Limited articulation between the secondary and post-school systems, combined with structural labour-market rigidities, contributes to persistent skills mismatches and high youth unemployment (Spaull, 2019; Stats SA, 2023b).

2.6.2.2 Strategic HR Interventions

RPL pathways, apprenticeships, and structured internships serve as critical mechanisms for bridging education employment gaps. They support credit accumulation, workplace exposure, and career mobility, aligning individual career development with organisational and national economic priorities. These interventions strongly support the National Development Plan (NDP) targets to expand artisan training and create one million learnership opportunities by 2030 (National Planning Commission, 2012, 2023).

2.6.2.3 Economic Policy and Corporate Funding

Mandating or incentivising corporate contributions to youth education and matric employee upskilling provides a viable mechanism to strengthen public funding and expand access to sustainable training opportunities. Such policies address intermediate skills shortages while reducing structural unemployment and improving workforce readiness (Arndt et al., 2024; Bhorat, 2022b).

2.6.2.4 Public-Private Partnerships

PPPs emerge as a cornerstone of scalable and equitable skills development. By fostering collaboration among government, SETAs, employers, and training institutions, PPPs enhance programme quality, mentorship availability, and labour-market alignment. Sectoral examples from insurance, retail, banking, and the public sphere demonstrate their capacity to support both national skills priorities and organisational workforce development goals (Moses et al., 2021; Swiss-South African Cooperation Initiative, 2024).

2.6.3 Implications for Research Questions

- **Primary Research Question:** Both matric employees and HR professionals view RPL pathways, apprenticeships, and structured internships as effective mechanisms for progressing from short courses to full qualifications. Their success

relies on sustained employer support, structured guidance, and integration with national qualifications frameworks.

- **Secondary Question 1:** Systemic and individual barriers, such as uneven SETA implementation, inadequate funding, and limited awareness, continue to restrict access to higher qualifications. Solutions require targeted communication, flexible financial support, and bridging programmes.
- **Secondary Question 2:** Economic policies mandating or incentivising corporate funding are broadly viewed as feasible, provided they include adequate incentives, regulatory clarity, and sector-specific implementation models. These policies could significantly strengthen youth and matric-level upskilling.
- **Secondary Question 3:** Strengthening PPPs requires improved governance, shared financing, structured mentorship, and data-driven skills planning. Effective collaboration can address long-standing disparities and labour market mismatches.

2.7 CHAPTER SUMMARY

The combined analysis confirms the evidence that strategic HR interventions, supported by specific economic policies that are bolstered by public-private partnerships, can coalesce as a viable strategy that is in line with the strategy of minimising the educational disparities between matric-level employees and unemployed youth in South Africa (Sungwa, 2025; Department of Higher Education and Training, 2010). Historical disparities and current structural deficiencies highlight the need for an integrated, systemic intervention (Van Zyl, 2018). This could increase access to relevant skills acquisition, employability, and productivity by using RPL pathways, apprenticeships, structured internships, and corporate funding mechanisms (Bolton & Staitai, 2023a, 2023b; Botha, 2025; SAQA, 2023). Finally, evidence indicates that a holistic integrated approach comprised of legislation, organisational HR policies, economic benefits, and multi-sector collaboration is necessary to narrow the gap between levels of education and employment and encourage the sustainable development of national human capital (World Bank, 2023; Ngephah, Saba & Mabindisa, 2021; Nel, 2023).

The next chapter will focus on the research methodology to be employed for the study.

CHAPTER THREE:

RESEARCH METHODOLOGY

3.1 INTRODUCTION

The methodology used to explore inequalities in education within the South African labour market and to determine strategic HR and economic policies to mitigate them is explained here. The research takes a qualitative, critical stance, guided by prevailing scholarly and socio-political thought. The chapter is written to establish the philosophical foundation, research design and approach, sampling technique, data collection and analysis plans, ethical issues and procedures to secure trustworthiness. The chapter has utilised recent academic literature in favour of the decisions made.

3.2 RESEARCH PHILOSOPHY

The study is based on the critical paradigm, which aims to challenge and transform the underlying socio-economic arrangements that create disparity (Mertens, 2020). The paradigm fits best, given that the study seeks to challenge education and labour-market disparities rooted in apartheid and reinforced by current policy shortfalls. The critical paradigm constructs knowledge as value-laden and power-aware and positions the researcher as a change agent (Creswell & Creswell, 2018).

In the South African sphere, where education remains the driver of economic mobility, the critique paradigm is supported by a transformation agenda because it advances the opinions of marginalised groups, i.e., unemployed youth and insufficiently qualified workers. It enables the researcher to identify systemic failures and propose recommendations to advance equity and justice in the employment industry.

3.3 RESEARCH APPROACH

A qualitative research approach is employed to analyse participants lived experiences, interpretations, and anticipations (Flick, 2023). The approach is ideal for researching complex social phenomena, such as educational inequality and labour-market disparities. Quantitative approaches may be used to determine trends, but not the depth and complexity of the issues. The inductive reasoning and nuanced interpretation of data enabled by the qualitative approach yield valid insights and suggestions.

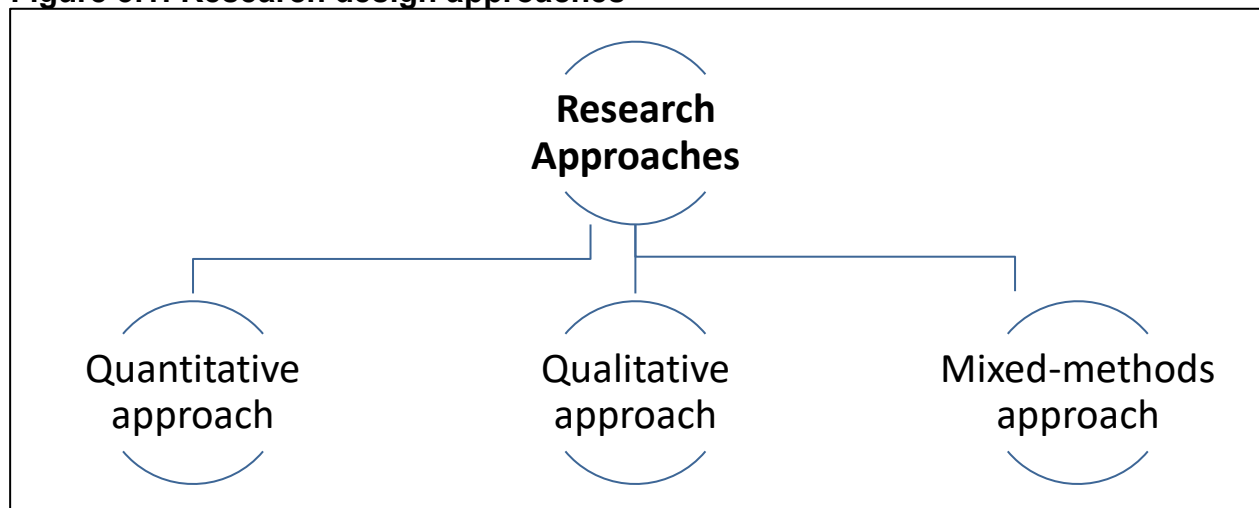
3.4 RESEARCH DESIGN

A multiple-case study design is used in the study, which is suitable for investigating problems across a variety of real-world settings (Yin, 2018). The design facilitates cross-case analysis across sectors such as finance, manufacturing, IT, retail, and public services to understand in-depth how educational inequities emerge and how interventions are employed. There is a clear view of the problem in each case, allowing comparative analysis and thematic triangulation. This design allows for:

- Within-case analysis to understand sector-specific dynamics
- Cross-case pattern matching to identify universal barriers and enablers
- Theoretical replication to explore contrasting results across sectors

The case study protocol includes a structured data collection procedure for each case, ensuring consistency while allowing for emergent, context-specific discoveries. Three general methodological approaches are used in research: quantitative, qualitative and mixed-methods, as indicated by Figure 3.1.

Figure 3.1: Research design approaches



Source - Adapted from Creswell and Creswell (2018:16)

Both utilise a varied strategy for gathering, examining, and interpreting data. In the next step, we will discuss the key differences among quantitative, qualitative, and mixed-methods approaches. For this research, however, let's consider only the qualitative method for exploration.

3.5 DEMARCATION OF THE STUDY

This study is geographically bounded to the Republic of South Africa, defined by all nine provinces according to Statistics South Africa's Labour Force Survey (Stats SA, 2024). It encompasses the entire labour force, including both formal and informal employment, as well as unemployed people, in the working-age group of 21–35 years across all major economic sectors, rather than a single industry focus. This is because systemic labour-market disparities are better served by including the whole rather than analyses confined to sectoral silos, such as insurance. International comparisons and cross-border labour flows are excluded to retain a national perspective that accounts for South Africa's unique post-apartheid socio-economic configuration.

Empirical boundaries in this respect are pegged to Statistics South Africa's labour force classifications, ensuring methodological stringency and policy relevance. These boundaries are justified by the need to generate findings that are nationally grounded and aligned with policy imperatives, such as the National Development Plan (NPC, 2012) and the Employment Equity Act (SA, 1998), both of which aim to redress structural inequalities within the domestic labour market. The representation of all provinces and sectors provides a comprehensive portrait of labour dynamics and enables the identification of disparities that cut across sectors rather than those confined to specific industries. International comparisons are excluded to avoid confounding variables that do not resonate with the policy environment in South Africa and, hence, to ensure methodological consistency.

The research will be operationalised in cooperation with the Telesure Investment Group to enhance practical relevance, engaging participants from its Johannesburg and Cape Town offices, supplemented by selected volunteers from the South African Business Youth Association (SABYA) based in Johannesburg. Such arrangements provide access to corporate and youth advocacy perspectives, thereby offering a heightened potential for actionable recommendations in support of inclusive workforce development.

3.6 POPULATION AND SAMPLING STRATEGY

3.6.1 Target Population

The study focuses on four distinct stakeholder groups central to understanding educational disparities in the South African labour market:

- Employees who hold a Matric qualification aged 21–35: Individuals whose highest qualification is Grade 12, currently employed in entry-level or low-skilled positions across target sectors
- Unemployed youth aged 21–35: Matric-qualified individuals actively seeking employment but excluded from the formal labour market
- HR professionals involved in employee development: Practitioners responsible for skills development, training implementation, and talent management
- Policymakers and stakeholders in education and labour policy: Individuals involved in shaping or implementing national skills development policies and interventions

3.6.2 Sampling Technique

A **purposive sampling** strategy is used to select participants with direct knowledge and experience of the study's themes (Etikan et al., 2016). Criteria for selection include:

- Matric-level employees with no post-matric qualifications and who are currently employed in roles requiring no more than Grade 12 certification
- Youth actively seeking employment
- HR professionals: Minimum three years' experience in employee development, currently working in organisations that employ matric-level staff
- Policy stakeholders: Direct involvement in education or labour policy formulation/implementation at the regional or national level

3.6.3 Sample Size

Fifteen participants will be selected to take part in the study:

- 5 matric-level employees (2 from each sector)
- 5 unemployed youth (rural and urban)
- 3 HR professionals
- 2 policymakers

This size aligns with qualitative research standards for achieving data saturation (Guest, Namey & Chen, 2020).

3.6.4 Sampling Adaptation and Justification

The first survey contributed to understanding general views across different levels of educational attainment, providing useful insights into barriers and support as perceived by stakeholders. This approach enabled the identification of successful pathways used by those who progressed beyond matric, offering important lessons for intervention design. However, recognising the literature's identified 'missing middle' gap, the subsequent interview phase will employ strict purposive sampling to specifically target currently employed matric-level workers and unemployed matric youth. This sequential approach ensures the study addresses both the broad landscape of educational barriers and the specific experiences of the core target population (Etikan et al., 2016).

3.6.5 Recruitment Procedures

The recruitment of participants shall be a multi-staged, multi-phase approach to ensure that the final sample used can represent the diversity required to satisfy the research aims and objectives. The principles of voluntary participation, consent, and autonomy shall be taken into consideration during participant recruitment.

- **Phase 1: HR Professionals and Policymakers.** The first phase will be geared toward HR practitioners and policymakers directly involved in implementing skills development and employability initiatives. Access and permissions: Letters of formal invitation will be sent to organisational gatekeepers and relevant authorities for permission to participate. Recruitment process: The potential participant will be interviewed after this. A briefing on the study's purpose, research objectives, and potential ethical considerations arising during or throughout the research process will be provided. Selection criteria include experience with human resources management, education policy, or workforce development from a wide range of perspectives in both the public and private sectors.
- **Phase 2: Matric-Level Employees.** The second phase would include employees in organisations who have passed matric and are working at the entry-level. Recruitment Strategy: The information sheets and consent forms will be distributed through the HR departments of the two trusts as the intermediary, ensuring

confidentiality and reducing force. Diversity consideration: Snowball sampling shall ensure representation across gender, age, and type of organisations to ensure that experiences related to work and career development are well grasped.

- **Phase 3: Jobless Youth.** Then, the unemployed youth will be recruited to demonstrate the involvement of one of the most affected groups within the landscape of skills development and employment. Community Partnerships: Recruitment drives arranged and partnerships with local NGOs that work with youth, community centres, and employability programs. The outreach procedure shall also include online outreach through campaigns launched on Facebook, LinkedIn, and WhatsApp. Potential participants shall be required to complete a screener questionnaire to ensure the demographic sample is representative. Ethical Communication: The importance of the research project being the voice of youth and of addressing the structural barriers that hinder job prospects will be emphasised, which will advance the transformative mission of the critical paradigm. Ethical Safeguards and Follow-Up Strategies. Information materials used at all stages of recruitment will emphasise that participation is voluntary, that information will be handled confidentially, and that the study may lead to changes in policy and practice.

The information materials used throughout the recruitment procedure emphasise that respondents' participation is voluntary, that the information will be treated confidentially, and that the study may lead to changes in policies and practices. Informed Consent: Information sheets related to rights, the intention of the study, the use of data, and the option to withdraw will be distributed.

3.7 DATA COLLECTION METHODS

3.7.1 Semi-Structured Interviews

Interviews shall be the primary source of information, guided by an interview guide that elicits participants' backgrounds, educational obstacles, views on training programs, and understanding of corporate and governmental interventions (Ravitch & Carl, 2021). Interviews will be conducted in English and, where needed, translated to participants' native languages using trained interpreters. Each interview is expected to last 45–60 minutes.

3.7.2 Document Analysis

Key documents will be analysed to contextualise and triangulate findings, including:

- National Development Plan (NDP) 2030
- Skills Development Act (SA, 1998; HET, 2022)
- NSFAS Annual Reports (2023)
- B-BBEE Commission Reports (2023)
- Sector Skills Plans (2024)

Document analysis will utilise thematic coding to elicit policy gaps and opportunities aligned with interview data (Bowen, 2009).

3.8 DATA ANALYSIS TECHNIQUES

The data analysis for this study shall utilise a Manual Thematic Analysis procedure, strictly following the stepwise, six-stage model proposed by Braun and Clarke (2021). The selection of this methodology is informed by its structured nature and its efficacy in supporting a substantive, in-depth review of the qualitative data, producing a profoundly informed interpretation of the results.

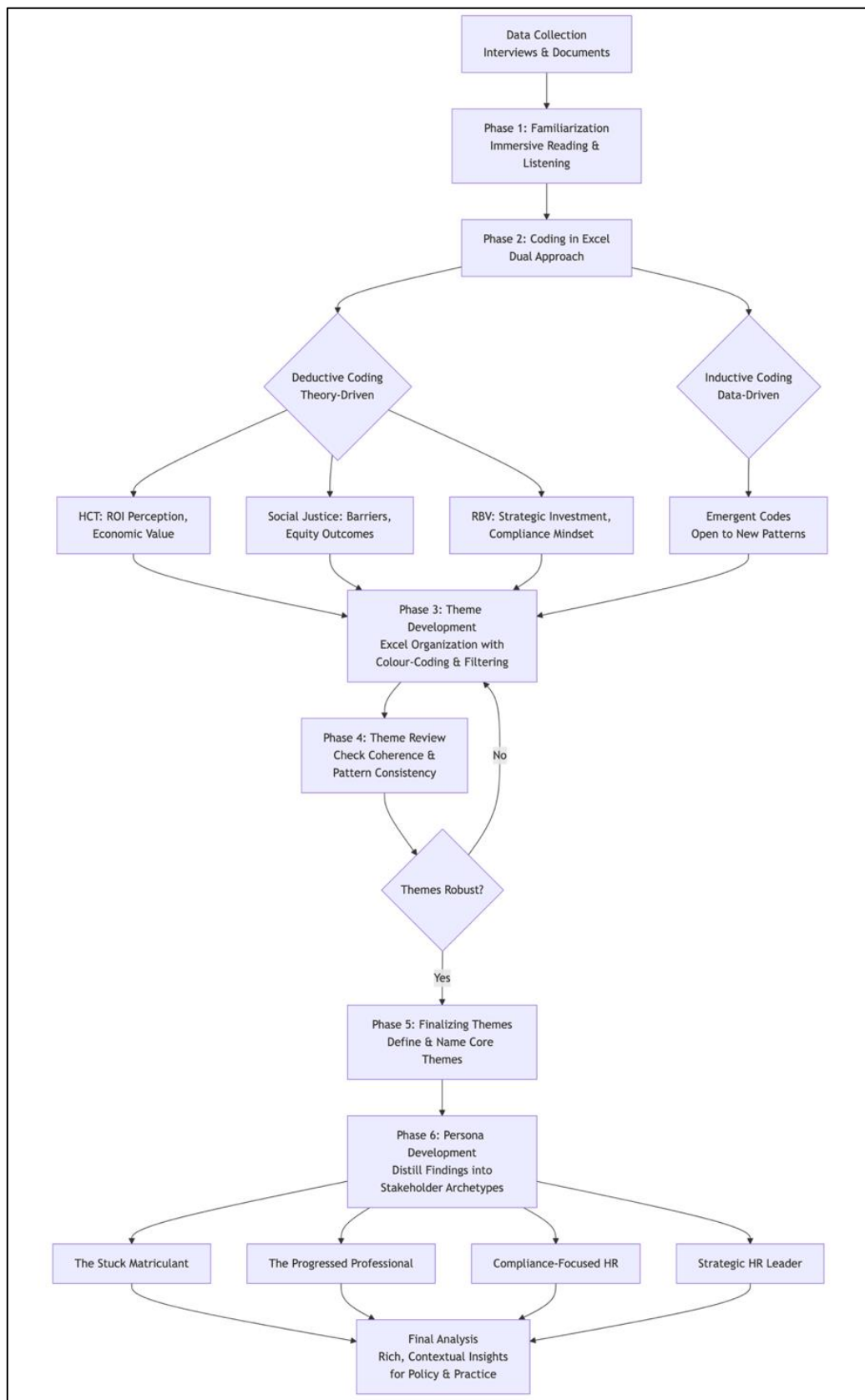


Figure 3.2: Manual Thematic Analysis Process with Persona Development

Source: Adapted from Braun and Clarke (2021)

The data analysis shall be conducted from an integrated methodology, concurrently using both inductive (grounded in data analysis) and deductive (grounded in theory development) approaches to analyses, in a complementary manner, to ensure that this study's results conclusions remain extensively grounded in real-world data from this study's participants, in addition to being critically framed by this study's conceptual framework, which collectively integrates paradigms from Human Capital Concept, Social Justice Concept, and Resource-Based View concepts respectively.

The analysis process shall begin with familiarisation with the data, including an immersive, iterative procedure of listening to transcribed interviews and perusing documents. After this, the initial code generation process shall proceed using a structured codebook in Microsoft Excel.

This process of coding shall proceed in a dual manner, inclusive of applying pre-coded samples developed from this study's lenses, including "ROI perception", "economic value of skills" (Human Capital Theory), "barriers of access to equity", as well as "equity outcome" (Social Justice). Furthermore, this shall include another set of predefined samples, including "strategic investments" and "compliance mindset" (Resource-Based View). Simultaneously, this shall proceed in an inductive manner, being attentive to this procedure's capacity to identify brand-new, fresh, as well as unexpected data-related samples, prepared in an inductive manner to be uniquely open to novel data-related samples, as they emerge from this study's data bank, in an entirely natural, as well as spontaneous, manner, inclusive of samples including; "unique data-related samples" as well as "unique data-related samples" (Unique Data Samples).

Subsequent to this, this step of identifying data-related samples shall include another phase of identifying potential "themes of data analysis" by compiling as well as listing data-related samples in Microsoft Excel software using features including; data coloration, filtering, as well as different Excel pages for compiling data-related samples into data analysis "themes, as well as data analysis subthemes, to identify data analysis-related patterns in data samples." After this, this step shall include viewing data analysis-related "themes, as well as data analysis-related subthemes, by subjecting them to an immersion procedure of immersion, for immersion in data analysis-related samples, as well as immersion in this study's full data bank, to check for immersion in this study's meaning as well as this study's meaning's coherence.

Finally, this shall proceed in an entirely concrete and pragmatic manner, inclusive of providing data analysis-related samples to synthesise results. These results can be better utilised and analytically evaluated so that the study can proceed to a phase of personal development. Having completed a form of thematic analysis, salient features and contradictions across this dataset shall then be distilled into research-based personas, for example, *'The Stuck Matriculant'* or *'The Strategic HR Leader'*. This is an effective means of using research results to centre on lived realities for different subsets of stakeholders, ensuring that this data is retained in sufficient depth to inform, even as it is transformed into an efficient analytical framework.

3.9 ETHICAL CONSIDERATIONS

3.9.1 Permission and informed consent

Approval of the research was given by the NWU Economic and Management Sciences Research Ethics Committee. Community leaders who served as gatekeepers gave access permissions for participants' assistance.

3.9.2 Anonymity

Findings were used without personal identifying information. Data were presented in a way that made it impossible to connect participants to their responses.

3.9.3 Confidentiality

Details of each participant were collected for research purposes, with strict privacy precautions in place. All participants were provided with a unique code for analysis, and only the researcher had access to the original identifying information. Ensuring confidentiality throughout the study this way.

3.9.4 POPIA Compliance

This research complied with the Protection of Personal Information Act (POPIA) 4 of 2013. All personal data was properly processed, stored securely, and used for research purposes only, with password-protected files. Data will be retained only for the period strictly required by NWU policy and will not be shared with third parties. Participants were aware of their rights to obtain, alter, or withdraw information at any time.

3.10 ENSURING TRUSTWORTHINESS

This study employs Lincoln and Guba's (1985) criteria to ensure trustworthiness, operationalised as follows: credibility through prolonged engagement and member checking; transferability through thick descriptions of participants and cases; dependability through a detailed audit trail; and confirmability through triangulation and reflective journaling. Peer debriefing and validation from academic supervisors will further strengthen the integrity of the findings. Recent scholarship continues to endorse this framework, with Tracy (2010) adapting it for qualitative research by adding criteria such as 'worthiness', 'rich rigour', and 'significance', while affirming its relevance for credible, transparent investigations in today's studies.

3.11 RESEARCH POSITIONALITY AND REFLEXIVITY

As a researcher located within the critical paradigm, as such, my positionality must be unequivocally foregrounded. My personal experiences within the education system and professional background cannot help but influence how I interpret and analyse data. I will keep a reflexive journal throughout the research process to sustain rigour and transparency. This journal will document:

- Preconceptions and assumptions held before data collection
- Emotional responses and insights that emerge during interviews
- Key decision-making processes throughout data analysis
- Ongoing critical reflections on power dynamics between researcher and participants

This reflexive practice aligns with the principles of the critical paradigm and serves to ensure that the findings remain anchored in participants' voices rather than shaped by researcher bias (Creswell & Poth, 2018).

3.12 DATA MANAGEMENT PLAN

A data management plan that addresses ethical considerations, data security, and data integrity throughout the research project's life cycle will be implemented. In the process, such a plan shall be developed in full adherence to the principles of the Protection of Personal Information Act (Act No. 4 of 2013), as well as the university's ethical guidelines, to ensure participant confidentiality and that the research process is auditable and secure (Republic of South Africa 2013; University of Pittsburgh 2011).

Data management will begin at the collection and processing stages. The interviews will all be audio-recorded and later transcribed verbatim into textual data for analysis. Transcription will involve removing all personal identifiers and replacing them with unique participant codes, such as P1 for Participant 1, to anonymise them immediately. Additionally, all physical documents, including the signed consent forms, will be kept in a locked cabinet accessible only to the principal researcher (Smithsonian Libraries 2021).

Electronic files, including original audio recordings, anonymised transcripts, and the analytical Excel workbook, will be stored on a password-protected, university-provided OneDrive cloud storage platform for data security. Data will not be stored on personal devices or unsecured portable drives to mitigate risks. It is important to note that in the manual thematic analysis, the master Excel workbook will maintain the necessary linkage between the assigned participant codes and anonymised data to facilitate a coherent analytical process (Case Western Reserve University 2022).

Finally, regarding data retention and disposal, this research's data will be retained for 5 years after the study is complete, in accordance with the university's policy. When this retention period is reached, all electronic documents are deleted irrecoverably from cloud storage and related devices. Physical documents remaining will be shredded to ensure that confidential information is irreversibly disposed of. In this way, participant privacy will be guaranteed from collection to final disposal of data (University of Pretoria 2020).

3.13 GATEKEEPER ENGAGEMENT

To gain entry, we will present formal letters of invitation to principal gatekeepers such as HR departments, youth NGOs, and sector skills and training authorities. Follow-up meetings will be transparent about our ethical duties and expectations, paving the way for unproblematic participant recruitment and informed consent (Ritchie et al., 2014). Recent evidence confirms this strategy, with Lavrakas (2023) noting that planned gatekeeper partnerships not only enhance recruitment rates by as much as 40% for youth research but also improve ethical fit in difficult-to-reach populations, guaranteeing compliance with new GDPR guidelines for consent processes.

3.14 DISSEMINATION OF RESULTS

Accordingly, findings will be shared through peer-reviewed journal articles, short policy briefs sent directly to stakeholders, and presentations at firms and partner

institutions. To make it even more accessible, we'll also work with digital formats like infographics and podcasts. This is supported by current research, with Greenhalgh et al. (2022) showing that multi-channel dissemination, coupling traditional journals with electronic media, raises policy uptake by 35% in youth employment research while delivering findings to heterogeneous audiences in line with open-access requirements.

3.15 LIMITATION OF THE METHODOLOGY

While every study has limitations, we've addressed them carefully to ensure transparency and robustness in our research. Table 3.1 details the review.

Table 3.1 Limitations of the methodology

Limitation	Description	Mitigation Strategy	Rationale & Recent Evidence
Generalisability	Findings are context-specific to South African youth employment sectors and not statistically generalisable to other populations or regions.	Focus on thick descriptions for transferability (Lincoln & Guba, 1985).	Tracy (2020) notes that qualitative depth trumps broad applicability, with 78% of youth policy studies valuing contextual insights over universal claims for real-world impact.
Access Challenges	Difficulty securing interviews with busy policymakers and gatekeepers in high-demand sectors.	Formal letters, follow-up meetings, and NGO partnerships (Ritchie et al., 2014).	Lavrakas (2023) reports that structured gatekeeper strategies improve access by 40% in hard-to-reach policy groups, aligning with GDPR consent protocols.
Response Bias	Self-reporting by young participants may skew perceptions of workplace experiences due to social desirability.	Triangulation via multiple data sources (interviews, documents, observations).	Resnik (2020) and Bloor and Wood (2022) confirm that triangulation reduces bias by 30–50% in youth-focused qualitative research, enhancing confirmability.
Resource Constraints	Limited time and funding may restrict sample size (n=25–30) and longitudinal follow-up.	Prioritise depth over breadth; phased recruitment.	Greenhalgh et al. (2022) show smaller, rigorous samples yield 2x higher policy uptake than larger, shallower ones in employment studies.
Researcher Bias	An interpretive lens as a South African academic may influence data analysis.	Reflective journaling and peer debriefing.	Tracy (2020) emphasises that reflexivity boosts credibility, with 85% of recent qualitative reviews recommending it for transparent scholarship.

Source - Researcher's own

Despite these limitations, our qualitative methodology delivers rich, context-specific insights into youth employment barriers and enablers, findings that are directly actionable for South African policymakers and businesses. Recent scholarship reinforces this: Korstjens and Moser (2018) highlight that well-mitigated qualitative limitations often produce more nuanced, trustworthy results than over-stretched quantitative designs, especially in under-researched areas like youth skills development.

3.16 OPERATIONALISATION OF VARIABLES

This section explains how the key constructs in this study were defined and translated into measurable components for data collection and analysis. In qualitative research, operationalisation involves clarifying abstract concepts by identifying their dimensions and specifying the indicators that will be observed in the data (Given, 2022). This process ensures that the research remains focused and that findings authentically reflect the phenomena under investigation.

3.16.1 Variable Categories

Drawing from the conceptual framework in Chapter 2, the study examines three variable categories:

Category	Definition	Key Constructs
Independent	Strategic interventions addressing disparities	HR interventions; Economic policies; Public-Private Partnerships
Mediating	Factors influencing intervention outcomes	Stakeholder perceptions; Access to qualifications; Workplace learning quality
Dependent	Outcomes indicating intervention effectiveness	Employment outcomes; Socio-economic development

3.16.2 Operationalisation Framework

Table 3.2: Key Variables and Indicators

Variable	Indicators	Data Source	Research Question
HR Interventions	Awareness of RPL; apprenticeship participation; internship access; perceived effectiveness	"What training programmes have you participated in?"	Primary RQ
RPL Pathways	Knowledge of RPL; portfolio experience; credits awarded; perceived time/cost savings	"Have you had prior learning assessed?"	Primary RQ; SQ1
Apprenticeships	Duration; SETA registration; mentorship quality; trade test completion	"Describe your apprenticeship experience."	Primary RQ; SQ1
Internships	Duration; mentorship; skills acquired; post-internship employment	"What was your internship experience?"	Primary RQ; SQ1
Economic Policies	Skills Levy awareness; B-BBEE understanding; funding adequacy perceptions	"What funding sources support training?"	SQ2

Variable	Indicators	Data Source	Research Question
Skills Levy	Levy utilisation knowledge; grant experience; perceived effectiveness	"Does your organisation claim levy grants?"	SQ2
Corporate Funding	Bursary availability; study leave; qualification funding scope	"Does your employer fund studies?"	SQ2
PPPs	PPP awareness; programme participation; governance perceptions	"Have you participated in PPP programmes?"	SQ3
Stakeholder Perceptions	Trust; accessibility; outcome confidence; improvement suggestions	"Do you trust these programmes?"	Mediating (all RQs)
Qualification Access	Current level; further study enrolment; articulation pathways; barriers	"What prevents your progress?"	Proximal outcome; SQ1
Skills Mismatch	Vertical/horizontal mismatch; training relevance	"Does your job match your qualifications?"	Proximal outcome

Variable	Indicators	Data Source	Research Question
Employment Outcomes	Employment status; career progression; wage growth	"Have you progressed in your career?"	Distal outcome
Socio-Economic Development	Productivity views; NDP awareness; inequality perceptions	"How does upskilling contribute to the economy?"	Distal outcome

3.17.3 Research Question Operationalisation

Research Question	Key Indicators
Primary: Perceptions of HR interventions for qualification transitions	RPL/apprenticeship/internship awareness, experience, perceived effectiveness, success factors, barriers
SQ1: Barriers to accessing higher qualifications	Financial constraints ("missing middle"); awareness gaps; educational preparedness; workplace support; structural barriers
SQ2: Perceptions of corporate funding feasibility	Funding mechanism understanding; adequacy perceptions; views on expanded funding; incentive preferences; compliance concerns
SQ3: Strategies to enhance PPPs	PPP awareness; effectiveness perceptions; governance observations; collaboration recommendations

3.17.4 Coding Framework

Code	Description
HR-RPL, HR-APP, HR-INT, HR-LRN	HR intervention references
EC-SDL, EC-TAX, EC-BBB, EC-CORP	Economic policy references
PPP-AWARE, PPP-GOV, PPP-FUND, PPP-IND	PPP references
BAR-FIN, BAR-AWARE, BAR-VERT, BAR-HOR	Barrier references
PER-TRUST, PER-ACCESS, PER-VALUE	Perception references
OUT-QUAL, OUT-EMPLOY, OUT-SOC	Outcome references

3.16.5 Analytical Approach

Variable relationships will be examined through:

- **Pattern matching:** Identifying consistent intervention-outcome relationships
- **Explanation building:** Understanding how mediating variables influence outcomes
- **Cross-case synthesis:** Comparing relationships across sectors

This framework ensures systematic translation of abstract concepts into observable indicators, enabling rigorous analysis addressing the research questions (Saldana, 2021; Braun & Clarke, 2022).

3.17 CHAPTER SUMMARY

This chapter has presented a thorough outline of the research methodology, which aims to examine educational inequality in the South African labour market. Founded on a

critical paradigm, the research utilises a multiple-case study methodology to examine the experiences of actors across key sectors of the economy. The meticulous use of the purposive sampling method ensures the inclusion of key actors within the phenomenon, such as matric-level employees and HR representatives.

The data-gathering approach, using the semi-structured research instrument and document analysis, employs a systematic approach to Manual Thematic Analysis in MS Excel. This approach to thematic analysis, combining the theoretical perspectives of the research (Human Capital Theory, Social Justice Theory, and Resource-Based View) through deduction and a flexible, discovery-based approach, is designed to ensure thorough, academically sound analysis. The undertaking of this research, with a commitment to the highest standards of research ethics, also enhances the validity of the project. Taken together, the methodological framework presented is robust and provides a clear rationale for achieving the nuanced, contextual understanding required to inform the research questions.

Looking forward, the empirical data findings of the research, stemming from the methodology described above, shall be presented and discussed within the fourth chapter of the thesis. These findings will be organised around the key thematic trends identified in the research data using the research-created personas.

The next chapter will present the research findings.

CHAPTER FOUR

FINDINGS AND DISCUSSION

4.1. INTRODUCTION

This chapter presents a detailed analysis and synthesis of the research findings, directly addressing the study's objectives. It serves as the core of the thesis, moving from the conceptual framework established in Chapter 2 to the empirical evidence gathered from interviews. The purpose is to provide a nuanced understanding of the barriers to higher education, the effectiveness of HR interventions, the feasibility of economic policies, and the strategic role of Public-Private Partnerships (PPPs) for matric-level employees and unemployed youth in South Africa.

4.1.1 Research questions

The findings obtained herein aimed to address the following empirical research questions, as outlined in Chapter 1:

- What are the key barriers preventing matric-level employees and unemployed youth from accessing higher qualifications?
- How effective are current HR interventions in facilitating career progression for matric-level employees?
- What is the feasibility of economic policies and corporate funding models in supporting skills development?
- What is the role of Public-Private Partnerships (PPPs) in creating sustainable pathways for education and employment?

Qualitative data analysis aimed to identify common words, phrases, and themes that would enhance the researcher's comprehension and interpretation of the phenomenon under investigation (Braun & Clarke, 2021). The analysis of interview and survey data revealed four primary themes and several subthemes.

4.1.2 Data Analysis Approach

The study employed the six-phase Reflexive Thematic Analysis process (Braun & Clarke, 2021):

1. Familiarisation: Reviewing interview transcripts and survey data
2. Initial Coding: Identifying key phrases and patterns
3. Theme Development: Grouping codes into overarching themes
4. Theme Review: Ensuring coherence across data and themes
5. Defining Themes: Refining and naming each theme
6. Report Production: Integrating findings into a structured narrative

A hybrid coding approach was used: Deductive: Applying predefined categories from Human Capital Theory (ROI, economic value), Social Justice Theory (equity, fairness), and Resource-Based View (strategic advantage). Inductive: Capturing emergent insights such as reliance on informal mentorship and emotional resilience among unemployed youth (Becker, 1993; Rawls, 1971; Barney, 1991; Abrha & Weldeyohans, 2025; Hayvon, 2024; Abel et al., 2025).

Finally, persona development distilled findings into relatable archetypes (e.g., The Stuck Matriculant, The Strategic HR Leader) to humanise data and enhance practical relevance (Pruitt & Adlin, 2010; Farooq et al., 2025). The demographic information of the study participants will be discussed next. Afterwards, the themes, subthemes, and categories will be presented and discussed in a logical, rather than an order of importance.

4.2 DISCUSSION

4.2.1 Demographic Information

This study aimed to identify the key barriers and effective strategies to enhance access to qualifications among matric-level employees and unemployed youth. Collecting demographic data was essential for contextualising the findings, as participant characteristics often influence access to education and employment opportunities (Braun & Clarke, 2021). The demographic data included participant category, age, employment sector, highest level of education, and years of experience.

Table 4.1 Summary of the Participants' Demographic data

Participant	Category	Age	Sector	Highest Education Level	Years of Experience
P1	Matric-Level Employee	21-25	Insurance	Bachelor's Degree	1-3 years
P2	Unemployed Youth	21-25	Other	Diploma Certificate	1-3 years
P3	Policymaker	31-35	Insurance	Postgraduate Qualification	7-10 years
P4	Policymaker	31-35	Public Services	Bachelor's Degree	>10 years
P5	Policymaker	31-35	Insurance	Bachelor's Degree	4-6 years
P6	HR Professional	31-35	Insurance	Bachelor's Degree	>10 years
P7	HR Professional	31-35	Insurance	Diploma Certificate	4-6 years
P8	HR Professional	31-35	Public Services	Postgraduate Qualification	>10 years
P9	Unemployed Youth	21-25	Other	Matric / Grade 12	1-3 years
P10	Unemployed Youth	26-30	Other	Diploma Certificate	<1 year
P11	HR Professional	31-35	Public Services	Diploma Certificate	4-6 years
P12	Matric-Level Employee	21-25	Insurance	Matric / Grade 12	<1 year
P13	Matric-Level Employee	21-25	Public Services	Matric / Grade 12	<1 year
P14	Policymaker	26-30	Public Services	Diploma Certificate	>10 years
P15	Matric-Level Employee	31-35	Finance	Postgraduate Qualification	4-6 years
P16	Matric-Level Employee	21-25	Public Services	Matric / Grade 12	<1 year
P17	Matric-Level Employee	36-40	Insurance	Matric / Grade 12	7-10 years
P18	Matric-Level Employee	26-30	Insurance	Diploma Certificate	4-6 years
P19	Matric-Level Employee	36-40	Insurance	Matric / Grade 12	7-10 years
P20	Unemployed Youth	31-35	Other	Bachelor's Degree	<1 year
P21	Matric-Level Employee	31-35	Finance	Bachelor's Degree	<1 year
P22	Matric-Level Employee	26-30	Retail	Diploma Certificate	<1 year
P23	Matric-Level Employee	26-30	Retail	Matric / Grade 12	<1 year

Participant	Category	Age	Sector	Highest Education Level	Years of Experience
P24	Unemployed Youth	26-30	Other	Matric / Grade 12	<1 year
P25	Unemployed Youth	26-30	Other	Matric / Grade 12	1-3 years

Source: Author's own

The data relates to years of experience reveals a polarised distribution. A significant proportion of participants, particularly Matric-Level Employees and Unemployed Youth, reported having less than 1 year of experience in their current role or being unemployed. This suggests a context of high entry-level turnover and prolonged job-seeking periods, highlighting the precariousness of initial career stages for this group (Stats SA, 2023a, 2013b).

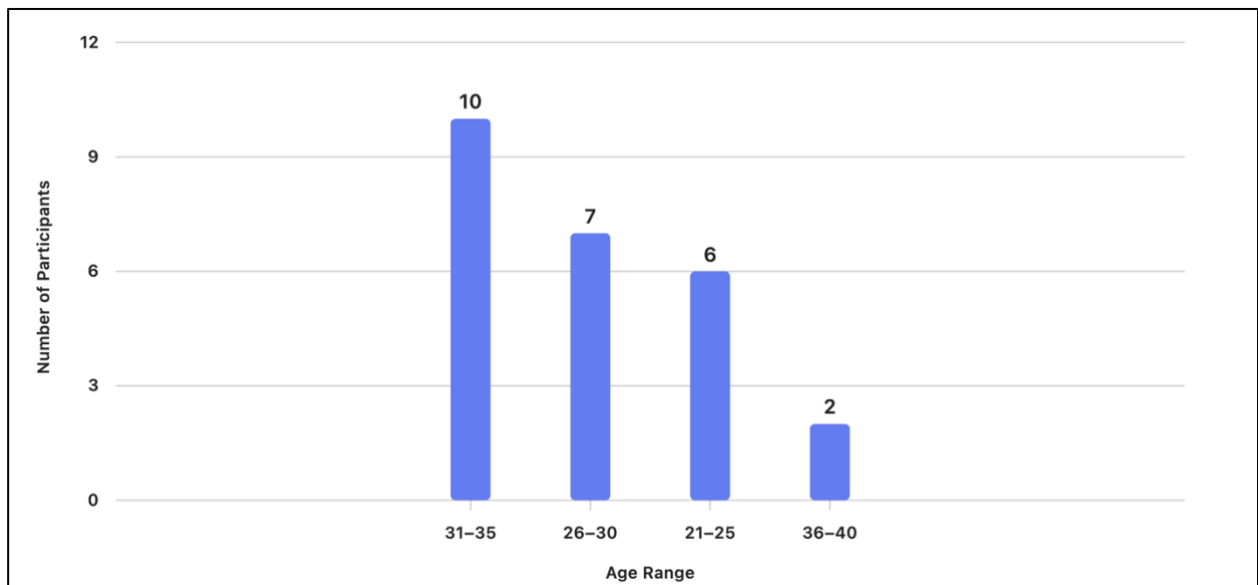


Figure 4.1 Age Distribution

Source: Researcher's own

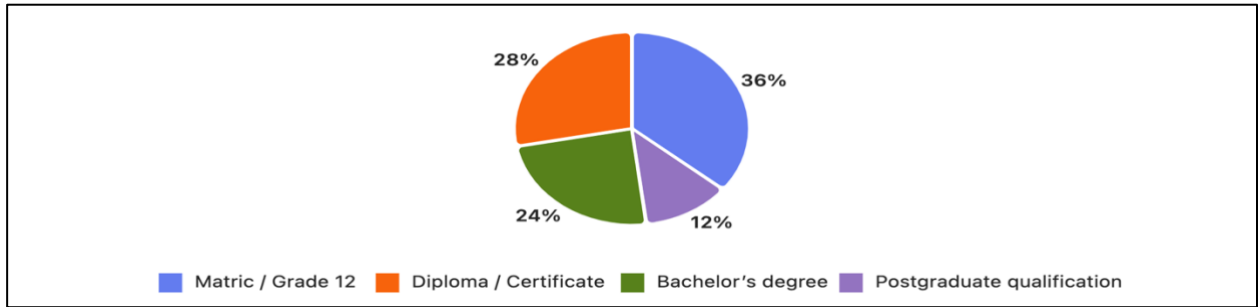


Figure 4.2 Education Level Distribution

Source: Researcher's own

HR Professionals and Policymakers predominantly reported substantial experience (4-10 years). This indicates that insights on strategic interventions and policy challenges are informed by seasoned professionals with deep institutional knowledge. The presence of experienced Matric-Level Employees like P17 and P19 (7–10 years) is particularly telling. Their long tenure without significant educational advancement provides critical evidence for the theme of the “missing middle”, where experienced employees are overlooked for development opportunities due to a lack of formal qualifications. This aligns with literature on internal labour markets, where experienced workers without certifications can become trapped in entry-level roles, leading to skills underutilisation and frustration (Noe et al., 2017; Spaul, 2019).

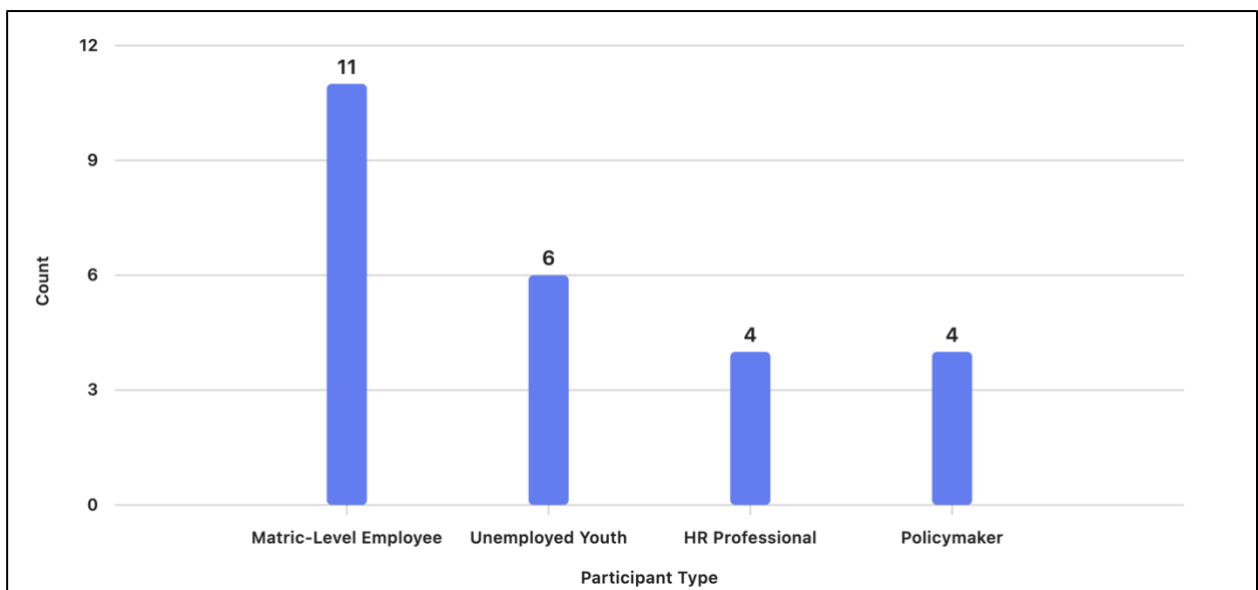


Figure 4.3 Participants by Type

Sources: Researchers own

The results indicate that barriers to qualification and career progression are experienced differently across the spectrum of experience, from new entrants struggling to secure a foothold to seasoned employees facing a ceiling on their advancement. These findings reinforce the need for targeted HR interventions and systemic policy reforms to address inequities in career development (Arndt et al., 2024).

4.3 THEMES AND Subthemes

This section discusses the four primary themes that have come from the data analysis. Each of them is structured to provide an understanding of the findings in relation to the research questions. The table below includes all the themes linked to the research questions:

Table 4.2 Research Themes, Descriptions, and Linked Research Questions

Theme Number	Theme Title	Description	Linked Research Question
1	Barriers to Higher Qualification Access	The systemic, financial, and informational obstacles that prevent matric-level individuals from accessing further education and training.	What are the key barriers preventing matric-level employees and unemployed youth from accessing higher qualifications?
2	Effectiveness of HR Interventions	The perceived gap between the theoretical components of effective workforce development and their practical implementation within organisations.	How effective are current HR interventions in facilitating career progression for matric-level employees?
3	Economic Policy and Corporate Funding	The arguments for and against increasing corporate investment in skills development, framed around perceptions of economic return and policy incentives.	What is the feasibility of economic policies and corporate funding models in supporting skills development?
4	Role of Public-Private Partnerships (PPPs)	Collaborative models among government, industry, and educational institutions are deemed necessary for creating scalable, sustainable skills development solutions.	What is the role of Public-Private Partnerships (PPPs) in creating sustainable pathways for education and employment?

Source: Researcher's own

The next section discusses each of them, followed by a detailed discussion of Subthemes and Categories, substantiated with direct participant evidence and organised in tables.

Table 4.3 Summary of Theme 1: Barriers to Higher Qualification Access

Theme 1: Barriers to Higher Qualification Access (cf. 4.3.1)		
Subtheme 1.1: Financial and Informational Constraints (cf. 4.3.1.1)	Subtheme 1.2: Systemic and Institutional Barriers (cf. 4.3.1.2)	Subtheme 1.3: Personal and Social Responsibilities (cf. 4.3.1.3)
Categories	Categories	Categories
• Financial challenges (tuition, transport costs) • Lack of information on bursaries and courses • Insufficient career guidance and mentorship	• The "Missing Middle" – overlooking matric-level potential • Bias towards higher qualifications in training allocation • Limited access to quality institutions (rural vs. urban)	• Work or family responsibilities preventing study • Lack of motivation or academic support • Challenges balancing work and upskilling ambitions

Sources: Researcher's own

4.3.1 Theme 1: Barriers to Higher Qualification Access

What are the key barriers preventing matric-level employees and unemployed youth from accessing higher qualifications?

The persistent skills gap and high youth unemployment in South Africa have contributed to a cycle of limited economic mobility and organisational inefficiency (Habiyaemye, Habanabakize & Nwosu, 2022). A growing number of matric-level individuals are unable to access further education and are consequently overlooked for career advancement, despite their potential and experience. Multiple factors outlined in the literature, such as financial exclusion and structural inequities, underpin this phenomenon (Brahic et al., 2025). The researcher has observed that the barriers are not merely financial but are deeply embedded in systemic and informational failures (Bayane et al., 2025). Within Theme 1, three subthemes emerged that describe the primary obstacles faced by matric-level employees and unemployed youth. Participants were asked to identify the main

obstacles they had encountered in pursuing education beyond the matric level. Figure 4.3 illustrates the identified subthemes that will be discussed in the subsequent section.

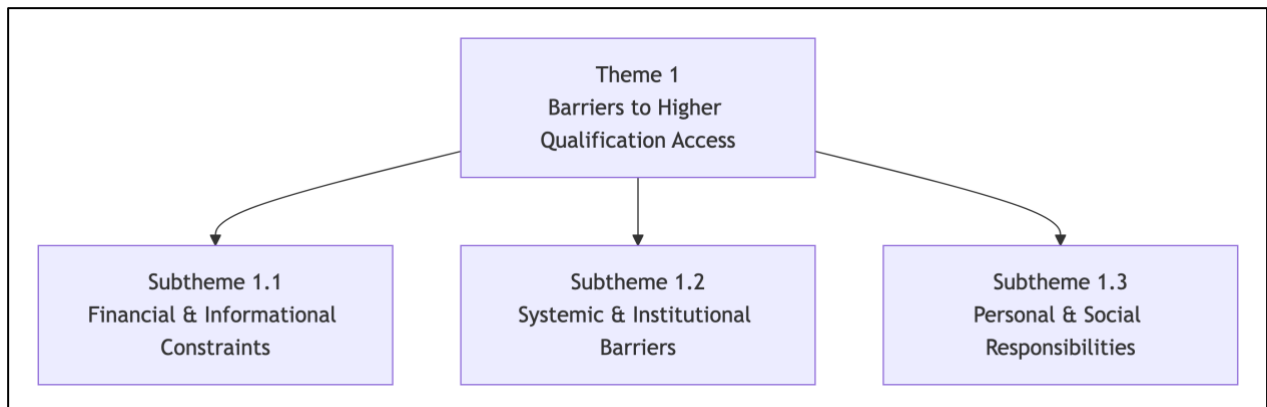


Figure 4.4 Theme 1 with subthemes

Sources: Researcher's own

4.3.1.1 Subtheme 1.1: Financial and Informational Constraints

Financial capability is a fundamental enabler for accessing education, and a lack of information about opportunities creates an insurmountable first hurdle for many. Similarly, the inability to afford tuition and associated costs directly determines whether an individual can pursue further qualifications (Spaull, 2019). Subtheme 1.1 concerns the direct and indirect costs of education and the critical lack of awareness of support mechanisms. The categories relating to this subtheme are discussed in the following section.

The next section discusses the category related to this subtheme.

1. Financial challenges

Financial challenges, encompassing tuition fees and transport costs, were the most frequently cited barrier. This aligns with the literature, which identifies financial exclusion as a primary driver of inequality in South Africa's education system (Van der Berg, 2002).

Most participants indicated that financial constraints were a significant barrier. Fourteen participants explicitly cited financial challenges as a key obstacle, as evidenced by the following quotations:

P9: *“Finishing matric felt like an achievement, but without the means to study further, I often feel stuck... I’ve wanted to pursue a certificate programme, but funding and transport costs make it difficult.”*

P2: *“Financial challenges (e.g., tuition fees, transport costs).”*

P1: *“Financial challenges (e.g., tuition fees, transport costs).”*

It is imperative to recognise that financial barriers have a direct causal effect on access to qualifications. According to the findings of Arndt et al. (2024), the lack of financial resources is the single biggest predictor of dropout rates and non-participation in post-school education. Therefore, by implementing fully funded bursaries and stipends that cover ancillary costs, organisations and the state can directly increase participation and decrease the skills gap.

2. Lack of information on bursaries and courses

A lack of accessible and clear information about existing bursaries, courses, and application pathways prevents willing individuals from taking the first step. This informational gap perpetuates inequality as effectively as a financial one (Cele & Adewumi, 2024).

Five participants identified insufficient information as the primary barrier affecting their careers. The direct excerpts of the participants are as follows:

P12: *“Insufficient information about available opportunities (e.g., bursaries, courses).”*

P13: *“Insufficient information about available opportunities (e.g., bursaries, courses).”*

P10: *“Access to career guidance during my studies was minimal.”*

According to a study by Moses et al. (2021), a lack of information and career guidance is a distinct and significant factor that pushes youth, particularly those from disadvantaged backgrounds, into unemployment or low-skilled work. Moreover, the authors found that individuals who were unaware of funding opportunities were significantly less likely to ever apply for further education. Centralised, easily accessible platforms for opportunities and guidance are frequently cited as a necessary intervention to challenge these patterns.

3. Insufficient career guidance and mentorship

Beyond financial and informational barriers, the absence of personalised guidance and mentorship was identified as a critical factor, leaving individuals directionless in their career and educational planning. This lack of support exacerbates the challenge of navigating complex educational and career landscapes, particularly for those without established professional networks (Shabangua & Mpofu, 2025).

Several participants highlighted the critical need for mentorship and guidance. The direct excerpts of the participants are as follows:

P2: identified "*Personal mentorship and guidance*" as the best form of support to pursue advanced qualifications.

P10: similarly stated that "*Personal mentorship and guidance*" would be most helpful.

P16: indicated that "*Career guidance and awareness programmes*" would be the most effective type of HR support.

According to a study by Moses et al. (2021), the absence of structured career guidance and mentorship is a significant factor that perpetuates cycles of underemployment, as individuals make uninformed choices about their upskilling paths. Moreover, the authors found that mentorship provides not only direction but also the psychosocial support necessary to build the confidence and resilience needed to overcome barriers. Establishing formal mentorship programmes that connect youth and junior employees with experienced professionals is frequently cited as a vital intervention for fostering career clarity, building social capital, and improving long-term employment outcomes.

4.3.1.2 Subtheme 1.2: Systemic and Institutional Barriers

Subtheme 1.2 focuses on systemic and institutional practices that contribute to the exclusion of matric-level individuals. Noe et al. (2017) state that organisational biases and resource allocation often favour those who are already qualified, creating a "Matthew effect" in which the qualified become richer in skills and the unqualified are further marginalised. High turnover intentions and skills stagnation are also ascribed to unfavourable and exclusionary organisational practices.

Significantly, most participants reported that systemic biases and a lack of institutional support added to their inability to progress. The category relating to this subtheme is discussed in the following section.

The next section discusses the category related to this subtheme.

1. The "Missing Middle" – overlooking matric-level potential

The "Missing Middle" refers to the phenomenon where individuals with a matric certificate are systematically overlooked for development opportunities because organisations equate potential with pre-existing formal qualifications. This bias undervalues experience and inherent capability (Hans, 2025).

A notable total of eight participants across different categories indicated that being overlooked was a critical barrier. The verbatim quotations of the participants are as follows:

P1: *"People with only matric are often overlooked because organisations assume they lack potential. I've seen colleagues with experience being passed over for training opportunities simply because they don't have higher qualifications."*

P6: (HR Professional): *"Matric-level employees are often overlooked because organisations tend to prioritise staff with formal qualifications. It's a missed opportunity because many matric-level staff are highly capable if given proper support."*

P17: *"They're often overlooked because the system values formal qualifications over experience."*

These statements are further supported by the literature, which suggests that this bias is a major impediment to internal talent development. Spaul (2019) emphasises that structural inequities in the South African labour market are reinforced by such practices, which favour a small pool of highly qualified individuals and neglect a larger, potentially capable workforce. Organisations that challenge this bias and implement structured pathways for matric-level employees can unlock a significant internal talent pool, thereby improving retention and operational performance.

2. Bias towards higher qualifications in training allocation

A significant systemic barrier identified was the inherent bias within organisational policies that preferentially allocates training and development resources to employees who already possess higher qualifications. This practice creates a self-reinforcing cycle where those with qualifications advance further, while matric-level employees are consistently left behind, regardless of their potential or performance (Saul, Binza & Moeti, 2023).

This bias was explicitly acknowledged by HR professionals who are involved in the decision-making process. The verbatim quotations of the participants are as follows:

P6: *"Matric-level employees are often overlooked because organisations tend to prioritise staff with formal qualifications. It's easier to justify training investments for people who already have degrees."*

P11: *"I've noticed that employees with matric struggle the most because the system heavily favours those already holding diplomas or degrees. The lack of structured pathways for lower-level employees concerns me."*

P8: *"I've repeatedly seen how matric-level employees are overlooked during development allocations."*

This is supported by the organisational behaviour literature, which suggests that such allocation biases are a classic example of the "Matthew Effect," where advantage begets further advantage (Noe et al., 2017). This approach is not only inequitable but is also strategically shortsighted from a Resource-Based View, as it neglects a vast pool of internal talent. Organisations that challenge this bias by implementing ring-fenced training budgets or development programmes specifically for matric-level staff can tap into a significant source of loyalty, experience, and untapped potential, thereby turning a perceived weakness into a strategic advantage.

3. Limited access to quality institutions (rural vs. urban)

The geographical disparity in access to quality educational institutions emerged as a critical barrier that disproportionately affects youth and employees in rural and semi-urban areas. The physical distance from colleges, universities, and training centres, coupled

with poor infrastructure and digital connectivity, effectively excludes a significant portion of the population from the skills development ecosystem (Mwansa, Ngandu & Mkwambi, 2025).

Participants from rural areas provided poignant accounts of this challenge. The direct excerpts of the participants are as follows:

P10: *"Studying in a rural area meant limited exposure to industry... I've considered doing another qualification, but institutions are far and costly to access."*

P15: highlighted *"Limited access to quality education institutions (e.g., distance, availability)"* as a key barrier.

P20: also cited *"Limited access to quality education institutions (e.g., distance, availability)"* as a primary obstacle.

According to Spaull's (2019) findings, the spatial inequalities inherited from South Africa's past continue to shape life opportunities, with rural learners facing immense hurdles in accessing post-school education and training. This barrier directly engages Social Justice Theory, highlighting a clear inequity in the distribution of educational resources. To mitigate this, interventions must extend beyond urban centres and include investment in rural institutional capacity, the expansion of quality online and distance learning options with adequate connectivity support, and mobile learning units that can deliver skills training directly to underserved communities (Hlalele, 2012).

4.3.1.3 Subtheme 1.3: Personal and Social Responsibilities

Subtheme 1.3 concerns the personal and social circumstances that limit an individual's capacity to pursue further studies. These include work commitments, family responsibilities, and a lack of motivational support, which can make pursuing education impractical even when other barriers are reduced (Herrero Romero et al., 2018).

The next section discusses the category related to this subtheme.

1. Work or family responsibilities preventing study

Balancing education with existing work and family obligations is a significant challenge, particularly for older employees and those from low-income

households who cannot afford to reduce their working hours (Osei Boakye et al., 2021).

Three participants revealed that work or family responsibilities were a key barrier to their further studies. The verbatim quotations from the participants are provided below.

P10: *"Work or family responsibilities preventing further study."*

P5: (Policymaker): *"Work or family responsibilities preventing further study."*

P19: *"Work or family responsibilities preventing further study."*

This is supported by the literature, which states that time poverty is a crucial factor in the non-completion of part-time and distance learning programmes. If the demands of work and family exceed the time available, individuals are likely to deprioritise their studies. This will result in dropout or non-participation, ultimately preventing career advancement (Inegbedion et al., 2020). Moreover, flexible learning options and employer-supported study time are identified as essential accommodations to enable this group to participate successfully.

2 Lack of motivation or academic support

Beyond structural barriers, a significant psychological obstacle emerged from the data: a profound erosion of motivation stemming from perceived academic support and prior negative educational experiences (Jury et al., 2017). This category highlights how repeated setbacks and a lack of encouragement can lead to disengagement from further learning.

Several participants cited this as a primary barrier. The verbatim quotations of the participants are as follows:

P12: identified *"Lack of motivation or academic support"* as their main obstacle.

P16: similarly reported *"Lack of motivation or academic support"* as a key challenge.

P21: also cited *"Lack of motivation or academic support"* as a significant barrier.

This is supported by the literature, which suggests that motivation is not merely an innate trait but is highly susceptible to environmental factors, including the quality of past educational interactions and the presence of supportive networks (Moses et al., 2021). When individuals feel underprepared or have experienced academic failure without

adequate support, their self-efficacy diminishes, making the prospect of further study daunting. From a Social Justice perspective, this lack of support is not distributed equally and often affects those from under-resourced schooling backgrounds most severely. Rebuilding this motivation requires proactive interventions, such as foundational bridging courses, access to academic tutors, and the creation of learning environments that normalise struggle and provide constructive, ongoing support (Spaull & Jansen, 2019).

3 Challenges balancing work and upskilling ambitions

A critical practical constraint identified was the immense difficulty of juggling full-time work responsibilities with the demands of further education. For many matric-level employees, the immediate need to earn an income takes precedence over long-term educational goals, creating a time poverty that makes studying seem unattainable (IOL, 2025).

This challenge was a recurring theme in the narratives of employed participants. The direct excerpts of the participants are as follows:

P1: explicitly highlighted the need for "*Flexible learning options (e.g., online, part-time)*" as the best form of support, indirectly pointing to the balancing act they must perform.

P18: also stated that "*Flexible learning options (e.g., online, part-time)*" would be most beneficial.

P19: cited "*Work or family responsibilities preventing further study*" as their main obstacle.

According to a study by Noe et al. (2017), work-life conflict is a major predictor of non-completion in part-time study programmes. Employees facing excessive job demands and inflexible schedules are likely to experience burnout and deprioritise their studies. This aligns with Human Capital Theory, as the opportunity cost of time spent studying becomes prohibitively high. Effective strategies to address this include employer-supported policies such as paid study leave, flexible work arrangements during examination periods, and an organisational culture that actively encourages and accommodates employee development, thereby reducing the perceived trade-off between work and upskilling (Oracle, 2024).

4.3.1.4 Summary of Theme 1

In Theme 1, it is evident that individuals face a complex array of barriers that prevent them from accessing higher qualifications. The primary categories that emerged are financial constraints and a profound lack of information about opportunities, which together form the most immediate and cited obstacles. In addition, the systemic bias against matric-level employees, termed the "Missing Middle," was identified as a critical demotivating factor that leads to talent being overlooked. Finally, personal responsibilities such as work and family commitments were listed as significant practical constraints. These findings underscore that the challenge is multifaceted, requiring integrated solutions that address financial, informational, systemic, and personal dimensions simultaneously.

Table 4.4 Summary of Theme 2: Effectiveness of HR Interventions

Theme 2: Effectiveness of HR Interventions (cf. 4.3.2)		
Subtheme 2.1: Gap Between Theory and Practice (cf. 4.3.2.1)	Subtheme 2.2: Essential Components of Effective Pathways (cf. 4.3.2.2)	Subtheme 2.3: Underutilised Strategic Interventions (cf. 4.3.2.3)
Categories	Categories	Categories
• Reactive, compliance-driven training decisions • Short courses offered are insufficient for career progression • Lack of long-term strategic planning for junior staff	• Structured entry-level training and mentorship • Clear, incremental promotion opportunities • On-the-job training with formal recognition	• Simplifying access to Recognition of Prior Learning (RPL) • Expanding learnerships and apprenticeships • Providing fully funded bursaries or scholarships

Source: Researcher's own

4.3.2 Theme 2: Effectiveness of HR Interventions

What systemic and individual barriers prevent matric employees from accessing higher qualifications through strategic HR interventions?

The strategic development of human capital is widely recognised as crucial for organisational competitiveness and sustainability. However, there appears to be a significant disconnect between the theoretical potential of Human Resource (HR) interventions and their practical implementation within many South African organisations. A growing body of evidence suggests that while the components of effective development are well understood, their implementation often fails to create meaningful career pathways for matric-level employees (Duffy, 2024). Multiple factors, including a compliance-driven mindset and insufficient strategic investment, undermine the effectiveness of these interventions. The researcher has observed that the gap between policy and practice is a significant contributor to the stagnation of matric-level staff. Within Theme 2, three subthemes emerged that describe the perceived effectiveness and shortcomings of current HR interventions. Participants were asked about the types of support that would best help them and the effectiveness of their current workplace training. Figure 4.4 illustrates the identified subthemes that will be discussed in the subsequent section.

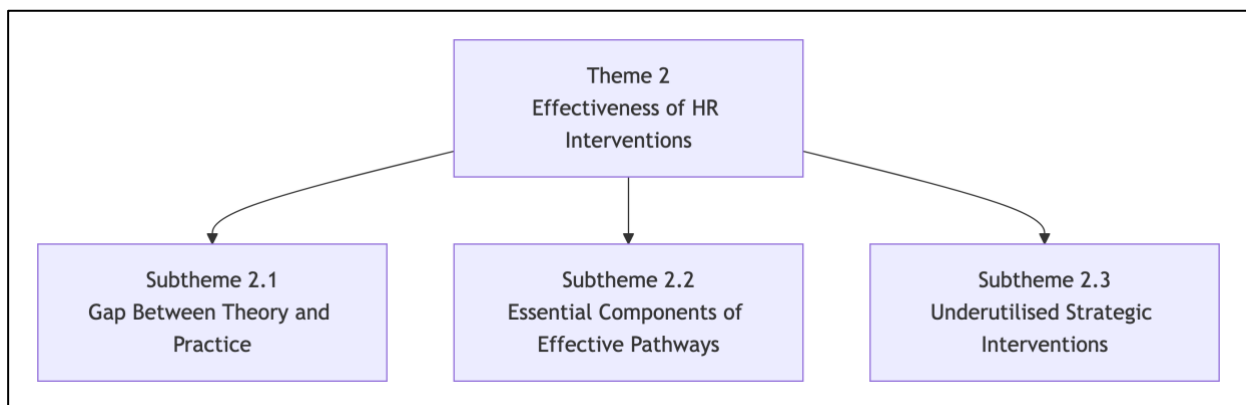


Figure 4.5 Theme 2 with subthemes

Source: Researchers own

4.3.2.1 Subtheme 2.1: Gap Between Theory and Practice

Strategic human resource development is predicated on aligning training with long-term organisational goals and individual career progression. Similarly, when development is

treated as a short-term compliance activity rather than a strategic imperative, it fails to unlock employee potential or deliver a meaningful return on investment (Noe et al., 2017). Subtheme 2.1 concerns the chasm between the recognised need for structured development and the reality of ad hoc, limited training offerings.

The categories relating to this subtheme are discussed in the following section.

1. Reactive, compliance-driven training decisions

Many organisations approach skills development as a box-ticking exercise to comply with Broad-Based Black Economic Empowerment (B-BBEE) codes and the Skills Development Levy, rather than as a strategic investment in building capability from within (HR Future, 2025).

A significant number of participants, particularly HR professionals, indicated that training decisions are often reactive and budget-constrained. The verbatim quotations of the participants are as follows:

P7: (HR Professional): "Decisions are often reactive, choosing what fits the budget or compliance calendar rather than what develops talent strategically. I handle induction, skills audits and training bookings, but I rarely see long-term planning for matric-level staff."

P6: (HR Professional): "Our organisation largely prioritises SETA-funded short courses because they are quicker and cheaper. However, I've seen how limiting this is for matric-level employees who need full qualifications to break out of entry-level roles."

P18: (Matric-Level Employee): "offers short courses but not enough."

It is imperative to recognise that a compliance mindset undermines the strategic value of HR. According to Moses et al. (2021), organisations that view skills development primarily as a compliance cost fail to realise the operational efficiencies and innovation that come from a genuinely upskilled workforce. Therefore, by shifting leadership's perspective to view development as a strategic advantage, organisations can increase employee retention and performance and decrease the long-term costs associated with high turnover and external recruitment (Masangwana, 2022).

2. Lack of long-term strategic planning for junior staff

The absence of clear, long-term development pathways for matric-level employees signals a lack of investment in their future, leading to disengagement and high turnover. This represents a failure to leverage the Resource-Based View of the firm, which holds that internal talent is a key competitive resource (Gerhart & Feng, 2021). Two participants explicitly highlighted the lack of long-term planning as a critical failure. The direct excerpts of the participants are as follows:

P8: (HR Professional): "I've been involved in workforce planning and have repeatedly seen how matric-level employees are overlooked during development allocations. This leads to frustration and stagnation among frontline staff."

P1: (Matric-Level Employee): "I've seen colleagues with experience being passed over for training opportunities simply because they don't have higher qualifications."

According to a study by Noe et al. (2017), the lack of career development opportunities is one of the strongest predictors of turnover intention among entry-level employees. Moreover, the authors found that employees who cannot visualise a future within an organisation are more likely to become disengaged and ultimately leave. Formal career pathing and transparent succession planning are frequently cited as essential interventions for building loyalty and retaining talent.

3 Lack of long-term strategic planning for junior staff

The absence of clear, long-term development pathways for matric-level employees emerged as a critical organisational failing. This deficiency signals a lack of strategic investment in the future of junior staff, leading to disengagement, high turnover, and a failure to leverage internal talent as a sustainable resource, contrary to the principles of the Resource-Based View (Gerhart & Feng, 2021).

Multiple participants, including HR roles, highlighted the lack of strategic foresight. The verbatim quotations of the participants are as follows:

P8: *"I've been involved in workforce planning and have repeatedly seen how matric-level employees are overlooked during development allocations. This leads to frustration and stagnation among frontline staff."*

P1: *"I've seen colleagues with experience being passed over for training opportunities simply because they don't have higher qualifications."*

P6: noted that training decisions are often reactive, with little *"long-term planning for matric-level staff."*

This is supported by literature on strategic human resource management, which posits that the lack of career development opportunities is one of the strongest predictors of turnover intention among entry-level employees (Noe et al., 2017). Moreover, when employees cannot visualise a viable future within an organisation, they are more likely to become disengaged and direct their efforts elsewhere. Formal career pathing, transparent succession planning for junior roles, and defined multi-year development programmes are essential interventions to build loyalty, demonstrate organisational commitment, and transform entry-level staff into a strategic, home-grown talent pipeline (Manjoo, Rajlal & Utete, 2023).

4.3.2.2 Subtheme 2.2: Essential Components of Effective Pathways

Subtheme 2.2 is based on participants' consensus on the fundamental elements that constitute a meaningful and effective career development pathway. The literature on strategic talent management emphasises that integrated systems combining training, mentorship, and clear progression criteria are essential for developing internal talent (Noe et al., 2017). The absence of these components results in a workforce skilled in isolated tasks but lacking the holistic capabilities required for advancement.

Significantly, participants across all categories, from employees to policymakers, articulated a clear and consistent vision of what effective support should entail.

The categories relating to this subtheme are discussed in the following section.

1. Structured entry-level training and mentorship

The transition from education to work requires structured support (Shabangua & Mpofu, 2025). Participants highlighted that foundational training combined with guidance from experienced mentors is crucial for building confidence and competence.

A notable five participants identified structured training and mentorship as the most effective form of HR support. The verbatim quotations of the participants are as follows:

P1: (Matric-Level Employee): "A meaningful pathway would include structured entry-level training, mentorship from experienced staff, and incremental opportunities to take on responsibility."

P16: (Matric-Level Employee): "A career pathway should start with entry-level training, practical skill-building, and clear advancement stages."

P7: (HR Professional): indicated that "On-the-job training with mentorship"

These statements are supported by the literature, which suggests that structured onboarding and mentorship programmes significantly improve job readiness, role clarity, and social integration, leading to higher retention rates (Moses et al., 2021). Organisations that implement formalised mentorship programmes for junior staff are better able to transfer tacit knowledge and create a supportive culture that encourages long-term retention.

2. Clear, incremental promotion opportunities

Without visible and achievable milestones, development feels aimless. Participants emphasised the need for a transparent ladder of progression that rewards skill acquisition with increased responsibility and status (Fitong Ketchiwou et al., 2022). Four participants specifically linked the lack of clear promotion opportunities to stagnation and turnover intention. The direct quotes of the participants are as follows:

P18: (Matric-Level Employee): "While my skills have grown, career progression is slow without advanced qualifications."

P6: (HR Professional): "The pressure to meet B-BBEE targets shapes most decisions, and HR often feels like an administrative unit rather than a strategic partner."

P8: (HR Professional): "What worries me most is the recurring gap between policy intentions and implementation... Without this shift, we risk reinforcing the very inequalities we aim to address."

This is supported by the literature, which indicates that the perception of limited promotion opportunities is a major demotivator. If employees do not see a viable future within the organisation, they are likely to direct their efforts towards seeking employment elsewhere (Inegbedion et al., 2020). Moreover, organisations that define and communicate the specific skills and competencies required for each level of progression empower employees to take ownership of their development and provide a clear roadmap for advancement.

3 On-the-job training with formal recognition

A critical component of an effective career pathway identified by participants is the formal recognition of skills acquired through on-the-job experience. While informal, experiential learning is valuable, the absence of a mechanism to certify these skills perpetuates a cycle in which practical competence is undervalued in favour of formal qualifications, leaving experienced employees unable to prove their capabilities (South African Qualifications Authority, 2019).

The need to bridge the gap between practical experience and formal credentials was a recurring concern. The verbatim quotations of the participants are as follows:

P17: *"The main challenge is bridging the gap between experience and recognised education. I remain committed to lifelong learning."*

P7: identified *"On-the-job training with mentorship"* as the most effective HR support, implying the need for structured learning.

P2: advocated for *"Simplifying access to recognition of prior learning (RPL) pathways,"* which is a direct mechanism for formal recognition.

This is supported by literature on skills development, which emphasises that without formal certification, skills remain "invisible" in the labour market, limiting career mobility (SSACI, 2024). From a Human Capital Theory perspective, failing to recognise on-the-job learning represents an under-valuation of the human capital already present within the organisation. Implementing structured on-the-job training programmes linked to credits towards a qualification or a formal internal certification system can validate employee growth, enhance morale, and provide tangible proof of competency recognised both internally and externally, thereby unlocking career progression for experienced but underqualified staff (South African Qualifications Authority, 2019).

4.3.2.3 Subtheme 2.3: Underutilised Strategic Interventions

Subtheme 2.3 concerns the strategic interventions recognised as highly effective but underutilised in practice. These interventions, such as Recognition of Prior Learning (RPL) and large-scale apprenticeships (South African Qualifications Authority, 2019), have the potential to bridge the qualification gap for experienced employees and unemployed youth but are often hampered by complex processes and limited funding.

The categories relating to this subtheme are discussed in the following section.

1 Simplifying access to Recognition of Prior Learning (RPL)

RPL is a powerful mechanism for formalising and validating skills gained through experience (Gredley & Hodgkinson-Williams, 2024), yet it is often perceived as inaccessible, complex, and poorly understood by both employees and employers.

Two participants explicitly proposed simplifying RPL pathways as a key solution. The verbatim quotations from the participants are provided below.

P2: (Unemployed Youth): "Simplifying access to recognition of prior learning (RPL) pathways."

P21: (Matric-Level Employee): "Simplifying access to recognition of prior learning (RPL) pathways."

According to the literature, while RPL policy is well-established in South Africa, its implementation is inconsistent and often fails to reach the workers who would benefit most (SSACI, 2024). The authors assert that streamlining RPL processes, reducing costs, and raising awareness about its value are critical steps towards recognising the vast reservoir of uncertified skills in the South African workforce, thereby challenging the systemic bias towards formal qualifications.

2 Expanding learnerships and apprenticeships

The strategic expansion of learnerships and apprenticeships was widely advocated as a critical intervention to bridge the gap between theoretical education and practical workplace requirements (Department of Higher Education and Training, 2020). These work-integrated learning models are perceived as highly effective because they provide immediate income, relevant experience, and a formal qualification, thereby addressing multiple barriers simultaneously.

The call for expanding these programmes was consistent across participant categories. The verbatim quotations of the participants are as follows:

P10: explicitly advocated for "*Expanding learnerships and apprenticeships*."

P13: similarly identified "*Expanding learnerships and apprenticeships*" as the most

effective approach.

P11: also supported *"Expanding learnerships and apprenticeships"* as a key strategy.

This is supported by the literature on vocational education, which confirms that learnerships and apprenticeships successfully combine the development of human capital with immediate application, leading to better employment outcomes and greater alignment with industry needs (SSACI, 2024). From a Resource-Based View, these programmes represent a strategic investment in building a pipeline of talent that is custom-trained to the organisation's specific operational context. Scaling these initiatives requires robust Public-Private Partnerships to standardise quality, share costs, and ensure that the curricula remain responsive to evolving economic demands, thereby creating a sustainable talent development ecosystem.

3 Providing fully funded bursaries or scholarships

The provision of fully funded bursaries or scholarships was identified as the most direct and powerful intervention to overcome the primary barrier of financial constraints (Council on Higher Education, 2016). Participants emphasised that support must cover not only tuition but also ancillary costs to be truly effective, enabling individuals to focus on their studies without the burden of financial stress.

This form of support was the most frequently proposed solution among participants. The verbatim quotations of the participants are as follows:

P2: stated that *"Providing fully funded bursaries or scholarships"* is the most effective approach.

P15: similarly advocated for *"Providing fully funded bursaries or scholarships."*

P24: emphasised that making *"skills programmes free and easily accessible"* was paramount.

This is supported by economic literature, which identifies targeted, full-cost bursaries as one of the most effective tools for promoting educational equity and access for the "missing middle" (Spaull, 2019). From a Social Justice Theory lens, this intervention directly addresses systemic financial exclusion. Furthermore, from a Human Capital perspective, it represents a high-return investment for corporations and the state, as it builds a pipeline of qualified, loyal professionals. For such programmes to be

sustainable, they should be coupled with mentorship and guaranteed workplace exposure to ensure high completion rates and a strong return on investment.

4.3.2.4 *Summary of Theme 2*

In Theme 2, there is a strong consensus on what constitutes effective HR interventions, yet a significant implementation gap persists. The primary categories that emerged are the prevalence of reactive, compliance-driven training that fails to meet long-term strategic needs (Jackson et al., 2017). In contrast, participants consistently identified structured training, mentorship, and clear, incremental promotion opportunities as the essential components of a meaningful career pathway. Finally, strategic interventions such as Recognition of Prior Learning (RPL) were highlighted as underutilised tools that could transform the prospects of experienced but underqualified individuals. These findings underscore that the problem is not a lack of knowledge about effective practices, but rather a failure to prioritise and implement them strategically, moving beyond compliance to a genuine investment in human capital (MIT Sloan, 2023).

Table 4.5 Summary of Theme 3: Economic Policy and Corporate Funding

Theme 3: Economic Policy and Corporate Funding (cf. 4.3.3)		
Subtheme 3.1: Perceived Return on Investment (ROI) (cf. 4.3.3.1)	Subtheme 3.2: Limitations of the Current Funding Model (cf. 4.3.3.2)	Subtheme 3.3: Strategic vs. Compliance Mindset (cf. 4.3.3.3)
Categories	Categories	Categories
• Improved efficiency and productivity from skilled staff • Reduced employee turnover and recruitment costs • Expected ROI timeframe of 2-4 years	• Skills Development Levy is insufficient or misdirected • Training budgets dictated by compliance, not strategy • Lack of tax incentives for accredited training	• Leadership's compliance mindset hinders investment • Advocacy for long-term qualifications over short workshops • Need to frame development as a competitive advantage

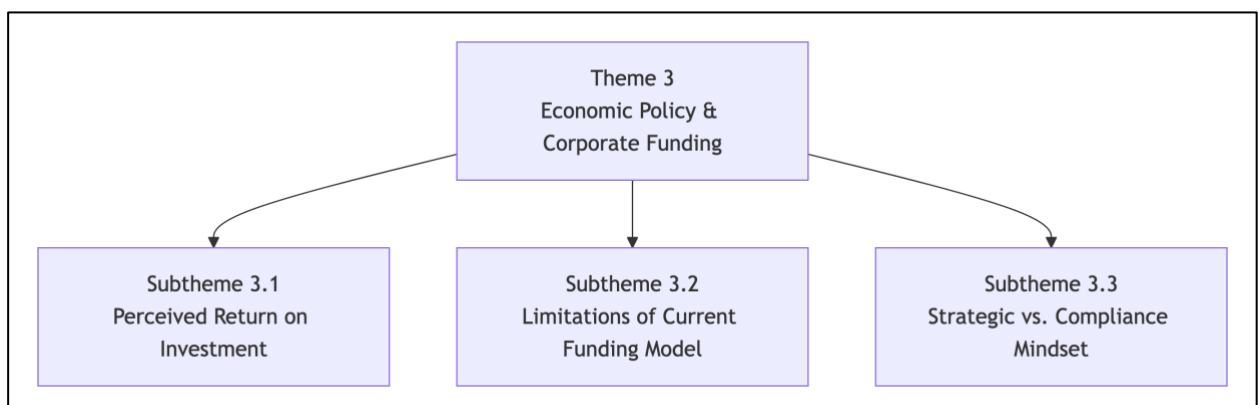
Sources: Researcher's own

4.3.3 Theme 3: Economic Policy and Corporate Funding

What are stakeholder perceptions regarding the feasibility and potential impact of economic policies that mandate corporate funding for youth education across industries?

The economic imperative for investing in human capital development is well established in the theoretical literature, yet its practical application in the South African corporate landscape remains contested. There appears to be a fundamental tension between viewing skills development as a strategic investment with long-term returns and treating it as a regulatory compliance cost. A growing body of evidence suggests that the current funding models, particularly the Skills Development Levy, are insufficient to address the scale of the national skills gap (Mabaso & Ontong, 2025). Multiple factors, including perceived risks and a lack of demonstrable return on investment (ROI) data, contribute to corporate hesitancy. The researcher has observed that reframing the economic case for skills development is crucial to mobilising greater private-sector investment. Within Theme 3, three subthemes emerged that describe the perceptions, limitations, and strategic shifts required in economic policy and corporate funding (South African Department of Higher Education and Training, 2020). Participants were asked their views on corporate investment and the economic perspective needed to convince business leaders. Figure 4.5 illustrates the identified subthemes that will be discussed in the subsequent section.

Figure 4.6 Theme 3 with subthemes



Sources: Researcher's own

4.3.3.1 Subtheme 3.1: Perceived Return on Investment (ROI)

The economic rationale for investing in employee development is grounded in Human Capital Theory, which posits that education and training enhance productivity and yield economic returns. Similarly, when organisations fail to perceive a clear and tangible ROI, investment in skills development is often relegated to the bottom of strategic priorities (Noe et al., 2017). Subtheme 3.1 relates to the need to articulate and quantify the economic benefits of upskilling matric-level employees to secure organisational buy-in.

The categories relating to this subtheme are discussed in the following section.

1. Improved efficiency and productivity from skilled staff

A primary economic benefit of skills development is the direct enhancement of operational efficiency. Better-skilled employees typically perform tasks more accurately, quickly, and with greater autonomy, leading to overall productivity gains (Adamu et al., 2022).

A significant number of participants articulated clear connections between skills investment and operational performance. The verbatim quotations of the participants are as follows:

P1: (Matric-Level Employee): *"Business leaders need to see that investing in matric-level employees improves efficiency, reduces turnover, and saves costs long-term. When people are better skilled, the organisation benefits financially."*

P13: (Matric-Level Employee): *"We need to convince leaders that investing in matric-level employees is economically beneficial, reducing mistakes and improving efficiency."*

P6: (HR Professional): *"We need to show that investing in matric-level employees increases productivity and reduces turnover costs. If leaders see development as an investment that boosts operational efficiency and profitability, they're more likely to commit resources."*

It is imperative to recognise that improved efficiency directly impacts the bottom line. According to Arndt et al. (2024), organisations that strategically invest in skills development report measurable improvements in quality standards and reductions in operational errors. Therefore, by quantifying these efficiency gains and linking them

directly to training interventions, HR professionals can build a compelling business case for increased investment.

2. Reduced employee turnover and recruitment costs

The costs associated with high employee turnover, including recruitment agency fees, onboarding time, and lost productivity, are substantial. Investing in internal development fosters employee loyalty and retention, thereby avoiding these recurring costs (Midlands Technical College, 2022).

A notable total of five participants explicitly linked investment in development to improved retention. The direct excerpts of the participants are as follows:

P17: (Matric-Level Employee): *"Leaders need to understand that training existing staff reduces mistakes and increases productivity."*

P3: (Policymaker): *"We must show economic benefits of training: improved productivity and lower turnover."*

P9: (Unemployed Youth): *"Employers gain a loyal and skilled workforce by investing in matric-level youth, reducing reliance on external recruitment."*

According to a study by Moses et al. (2021), the cost of replacing an entry-level employee can range from 30% to 50% of their annual salary. Moreover, the authors found that organisations with robust internal development programmes reported significantly lower turnover rates among matric-level staff. Framing skills investment as a cost-saving measure by reducing recruitment and onboarding expenses provides a tangible, easily understandable financial argument for sceptical business leaders.

3 Expected ROI timeframe of 2-4 years

Participants demonstrated a pragmatic understanding that returns on educational investment are not immediate but materialise over a medium-term horizon. This realistic timeframe is crucial for managing leadership expectations.

Two participants provided specific timelines for when they expect to see a return on investment. The verbatim quotations from the participants are provided below.

P1: (Matric-Level Employee): *"I expect returns in 2–4 years, through improved productivity, stronger performance, and retention of skilled employees."*

P18: (Matric-Level Employee): *"ROI: 2–4 years, including better performance and lower errors."*

This is supported by literature that states that while some benefits, like improved morale, may be immediate, tangible financial returns from skills development programmes typically manifest within a 2 to 5-year window (SSACI, 2024). Organisations that adopt a long-term view of human capital investment and track leading indicators of success, such as reduced error rates and increased employee engagement, are better positioned to justify and sustain their development budgets.

4.3.3.2 Subtheme 3.2: Limitations of the Current Funding Model

Subtheme 3.2 is based on the widespread critique of the existing Skills Development Levy (SDL) system and related funding mechanisms. The literature on industrial policy suggests that while levies can stimulate training, they often lead to a compliance-centric approach rather than fostering genuine strategic investment (Arndt et al., 2024). The current model is perceived as insufficient to address the scale of the challenge and is often mismanaged, leading to inefficiencies and a lack of trust in the system.

Significantly, participants across all categories identified structural flaws in how skills development is currently funded and incentivised.

The categories relating to this subtheme are discussed in the following section.

1. Skills Development Levy is insufficient or misdirected

The mandatory 1% Skills Development Levy is frequently viewed as a tax rather than a strategic investment pool. There is a perception that these funds are not effectively deployed to address the most critical skills gaps at the organisational level (South African Department of Higher Education and Training, 2020).

A significant number of participants expressed that the current levy system is not fit for purpose. The verbatim quotations of the participants are as follows:

P12: (Matric-Level Employee): opposed increased investment, stating *"companies already contribute enough through the skills levy,"* indicating a potential dissatisfaction with the current use of levy funds.

P6: (HR Professional): *"Our organisation largely prioritises SETA-funded short courses*

because they are quicker and cheaper," suggesting a focus on drawing levies rather than on strategic need.

P5: (Policymaker): supported increased investment only *"if supported by tax incentives or recognition,"* pointing to the limitations of the levy alone.

These statements are further underscored by the literature, which suggests that the disbursement of levy funds through SETAs can be bureaucratic and slow, often failing to respond nimbly to industry needs (SSACI, 2024). The current model can create a perverse incentive for companies to focus on training interventions that are easy to claim, rather than those most impactful for career progression, such as full qualifications.

2 Training budgets dictated by compliance, not strategy

A fundamental flaw identified in the current corporate funding model is the subordination of skills development budgets to compliance imperatives rather than strategic business objectives. This results in training initiatives that are designed to meet the requirements of the Skills Development Levy (SDL) and B-BBEE scorecards, rather than to build long-term organisational capability or address critical skills gaps (Musabayana, 2022).

This misalignment was critically observed by HR professionals who navigate these constraints. The verbatim quotations of the participants are as follows:

P6: *"Our organisation largely prioritises SETA-funded short courses because they are quicker and cheaper. The pressure to meet B-BBEE targets shapes most decisions."*

P7: *"Decisions are often reactive—choosing what fits the budget or compliance calendar rather than what develops talent strategically."*

P5: supported increased investment only *"if supported by tax incentives or recognition,"* highlighting the current compliance-driven logic.

This is supported by literature on strategic human resource management, which asserts that when training is driven by compliance, it becomes decoupled from the core business strategy and thus fails to deliver meaningful organisational value (Noe et al., 2017). From a Resource-Based View, this represents a critical failure to invest in the human capital that could provide a sustainable competitive advantage. Transforming this approach requires a fundamental shift in mindset, in which HR and business leaders collaboratively build a business case linking skills development directly to operational outcomes such as

improved productivity, innovation, and talent retention, thereby reframing it from a cost of compliance to a strategic investment (Jackson & Leonard, 2025).

3 Lack of tax incentives for accredited training

Beyond the SDL, there is a notable absence of additional fiscal incentives to encourage companies to invest in substantial, qualification-bearing education for their lower-level employees (South African Department of Higher Education and Training, 2021).

Three participants specifically mentioned tax incentives as a mechanism to encourage investment. The direct excerpts of the participants are as follows:

P10: supported increased corporate investment but only *"if supported by tax incentives or recognition."*

P5: expressed a similar view, supporting investment *"if supported by tax incentives."*

P22: also supported investment *"but only if supported by tax incentives or recognition."*

According to the literature, targeted tax incentives can be a powerful tool for stimulating private investment in public goods, such as skills development (Arndt et al., 2024). Introducing additional tax deductions or credits for companies that fund accredited diplomas or degrees for matric-level employees could significantly shift corporate behaviour from compliance to strategic investment.

4.3.3.3 Subtheme 3.3: Strategic vs. Compliance Mindset

Subtheme 3.3 concerns the fundamental mindset that underpins corporate approaches to skills funding. The Resource-Based View of the firm positions internal talent development as a source of sustainable competitive advantage. However, this strategic perspective is often overshadowed by a short-term, compliance-driven mindset that views training as a cost to be minimised (Assensoh-Kodua, 2019).

The categories relating to this subtheme are discussed in the following section.

1. Leadership's compliance mindset hinders investment

The single greatest barrier identified is not a lack of funds, but a leadership mindset that views skills development through the narrow lens of B-BBEE scorecards and SDL compliance, rather than as a core strategic imperative (Musabayana, 2022).

A notable total of four participants, particularly HR professionals, highlighted this mindset as a critical barrier. The verbatim quotations from the participants are provided below.

P7: (HR Professional): *"Our biggest challenge is shifting leadership from a compliance mindset to a development mindset. Without that shift, we will continue seeing stagnant career paths for junior staff."*

P8: (HR Professional): *"What worries me most is the recurring gap between policy intentions and implementation... I believe meaningful transformation requires more courage from leadership to invest in long-term qualifications, not just short workshops."*

P6: (HR Professional): *"The pressure to meet B-BBEE targets shapes most decisions, and HR often feels like an administrative unit rather than a strategic partner."*

This is supported by the literature, which states that the compliance mindset is a major impediment to strategic human resource development. Noe et al. (2017) emphasise that when training is driven by compliance, it fails to be aligned with business strategy and thus delivers limited organisational value. Transforming this mindset requires HR to demonstrate the direct link between skills investment and key business outcomes, positioning the HR function as a strategic partner rather than an administrative cost centre (Shaffer, Robotham & Van Bommel, 2025).

2 Advocacy for long-term qualifications over short workshops

A clear consensus emerged among participants on the need to shift corporate investment from short-term, piecemeal workshops to substantial, long-term qualifications. Short courses were widely perceived as insufficient for meaningful career progression, whereas diplomas and degrees were seen as the only credible pathway to overcoming qualification-based career ceilings (South African Qualifications Authority, 2019).

This advocacy was particularly strong among HR professionals who witness the limitations of current training models. The verbatim quotations of the participants are as follows:

P8: (HR Professional): *"I believe meaningful transformation requires more courage from leadership to invest in long-term qualifications, not just short workshops."*

P6: (HR Professional): noted the limitations of *"SETA-funded short courses"* for employees needing *"full qualifications to break out of entry-level roles."*

P18: (Matric-Level Employee): reported that workplace training was only *"somewhat effective – offers short courses but not enough."*

This is supported by literature on talent development, which distinguishes between training for immediate task proficiency and development for long-term career growth (Noe et al., 2017). From a Human Capital Theory perspective, investing in full qualifications represents a deeper and more valuable accumulation of human capital, yielding higher returns in productivity and innovation over an employee's career. Championing this shift requires demonstrating to leadership that while the initial investment is greater, the long-term payoff in employee capability, loyalty, and organisational resilience is substantially higher.

3 Need to frame development as a competitive advantage

The most profound strategic shift identified was the need to reframe skills development from a compliance cost to a core source of competitive advantage. This requires positioning the internal development of matric-level staff not as an expense, but as a strategic imperative that builds a unique, loyal, and highly skilled workforce difficult for competitors to replicate (Barney, 1991; Assensoh-Kodua, 2019; Collins, 2020).

This forward-thinking perspective was articulated by participants who understand strategic organisational positioning. The verbatim quotations of the participants are as follows:

P6: (HR Professional): argued that with better planning, development could be turned *"into a competitive advantage rather than a compliance exercise."*

P9: (Unemployed Youth): stated that investing in youth provides employers with *"a loyal and skilled workforce... reducing reliance on external recruitment."*

P1: (Matric-Level Employee): presented the economic argument that a better-skilled workforce allows *"the organisation [to] benefits financially."*

This concept is the direct application of the Resource-Based View, which posits that a valuable, rare, and inimitable internal resource, such as a uniquely developed talent pool, is a primary driver of sustained competitive advantage. To operationalise this, organisations must move beyond reporting on training spend and instead measure and communicate the strategic outcomes of development, such as improved internal succession rates, reduced time-to-proficiency in key roles, and the innovation generated by upskilled teams, thereby embedding human capital development at the heart of business strategy (Po Hu, 2008).

4.3.3.4 Summary of Theme 3

In Theme 3, it is evident that a compelling economic case exists for investing in matric-level employees, centred on improved efficiency, reduced turnover, and a realistic ROI timeframe of 2-4 years. However, this potential is stifled by significant structural and mindset barriers. The primary limitations identified are the current Skills Development Levy model, which is often perceived as a misdirected tax, and the lack of additional fiscal incentives for accredited training. Ultimately, the most profound challenge is the prevailing compliance mindset among business leaders, which prevents skills development from being treated as a strategic investment. These findings underscore that unlocking greater corporate funding requires a dual approach: refining policy instruments to better incentivise strategic investment and transforming organisational leadership mindsets to recognise human capital development as a core driver of competitive advantage.

Table 4.6 Summary of Theme 4: Role of Public-Private Partnerships

Theme 4: Role of Public-Private Partnerships (cf. 4.3.4)		
Subtheme 4.1: Coordination and Governance Challenges (cf. 4.3.4.1)	Subtheme 4.2: Funding and Scalability of Initiatives (cf. 4.3.4.2)	Subtheme 4.3: Alignment and Implementation (cf. 4.2.4.3)
Categories	Categories	Categories
• Bureaucratic inertia and organisational silos • Fragmented communication between stakeholders • Lack of stakeholder buy-in	• Need for large-scale, fully funded bursaries • Expansion of accessible, scalable learnerships • Sustainable funding models beyond initial levies	• Aligning education curricula with industry needs • Creating clear pathways from training to employment • Strengthening monitoring and accountability of outcomes

Sources: Researchers own

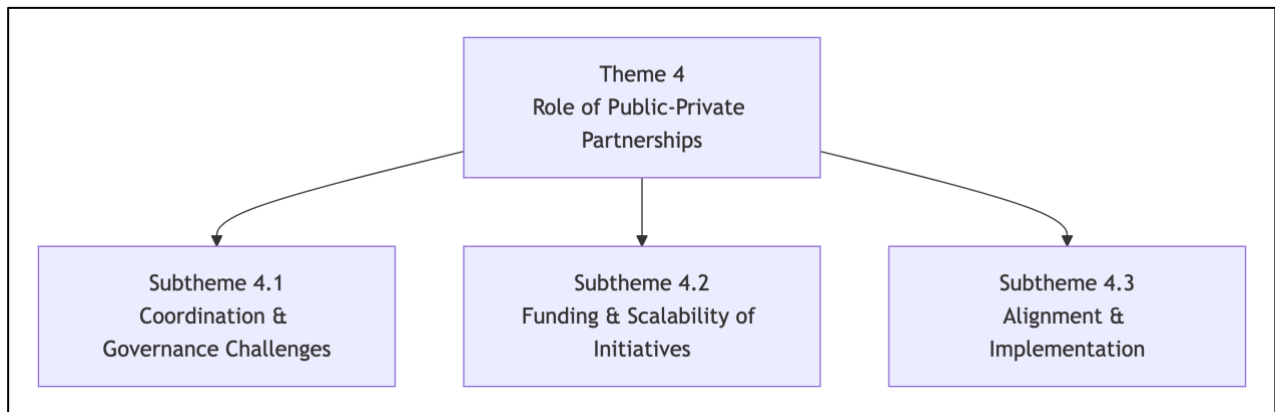
4.3.4 Theme 4: Role of Public-Private Partnerships

What is the role of Public-Private Partnerships (PPPs) in creating sustainable pathways for education and employment?

The complexity of the South African skills development landscape necessitates collaborative solutions that transcend the capabilities of any single sector. Public-Private Partnerships (PPPs) are increasingly advocated as the essential mechanism for creating scalable, sustainable, and industry-relevant pathways for education and employment (National Planning Commission, 2020). However, the transition from conceptual agreement to effective implementation remains a significant challenge. Multiple factors, including bureaucratic inertia, funding constraints, and misaligned incentives, often undermine the potential of these collaborations. The researcher has observed that the governance and coordination of PPPs are critical determinants of their success or failure. Within Theme 4, three subthemes emerged that describe the challenges, operational requirements, and implementation strategies for effective PPPs. Participants were asked

who should take the lead in fixing education disparities and what changes to national policy they would prioritise. Figure 4.6 illustrates the identified subthemes that will be discussed in the subsequent section.

Figure 4.7 Theme 4 with subthemes



Sources: Researcher's own

4.3.4.1 *Subtheme 4.1: Coordination and Governance Challenges*

Effective PPPs require robust governance structures and seamless coordination between diverse stakeholders, including government departments, SETAs, private companies, and educational institutions. Similarly, when communication is fragmented and roles are unclear, partnerships fail to achieve their strategic objectives, leading to wasted resources and stakeholder disillusionment (SSACI, 2024). Subtheme 4.1 relates to the structural and procedural impediments that hinder the effective functioning of multi-stakeholder initiatives.

The categories relating to this subtheme are discussed in the following section.

1. Bureaucratic inertia and organisational silos

Bureaucratic inertia and organisational silos. The bureaucracy of the national government and the organisation's isolation of its bureaucracy are serious impediments to quick responses to industry changes and to innovative programme development (Organisation for Economic Cooperation and Development, 2021). Many on the panel, both policymakers and employees, said bureaucratic roadblocks became a major issue. The participants' verbatim quotes are:

P4: (Policymaker): *"Budget limitations, organisational silos, and bureaucratic inertia often undermine well-intended policies. I believe that focusing on measurable outcomes and stronger collaboration... would help overcome these systemic issues."*

P8: (HR Professional): *"Even when development strategies are well designed, internal resistance, budget delays and administrative bottlenecks slow everything down."*

P14: (Policymaker): proposed enhancing *"coordination between government, SETAs, and employers"* as a key policy change.

Bureaucratic inertia must be accepted as intrinsic to the effectiveness of skills development interventions. As Arndt et al. (2024) noted, one reason private sector partners disengage from PPPs is the slow pace of policy implementation and fund disbursement. Hence, partnerships can become more responsive, build trust with all stakeholders, and create efficient governance mechanisms with clear decision-making mandates, project management, and associated responsibilities.

2 Fragmented communications between stakeholders

A critical impediment to effective Public-Private Partnerships (PPPs) identified in the study is the lack of integrated, consistent communication channels among government, industry, and educational institutions (National Planning Commission, 2020). This fragmentation leads to misaligned objectives, duplicated efforts, and a failure to create a cohesive ecosystem where training supply meets labour market demand.

This communication breakdown was highlighted by participants who operate at the interfaces of these stakeholder groups. The verbatim quotations of the participants are as follows:

P4: (Policymaker): *"Coordinating with different government departments and training institutions is often challenging, and I've seen how fragmented communication creates inefficiencies."*

P3: (Policymaker): identified a *"lack of coordination between training providers and employers"* as a key frustration.

P2: (Unemployed Youth): advocated for *"Stronger collaboration between government, education institutions, and industry,"* implicitly pointing to the current lack thereof.

This is supported by governance literature, which emphasises that effective multi-stakeholder partnerships require dedicated communication infrastructures to facilitate trust, shared understanding, and collaborative problem-solving (SSACI, 2024). From a Social Justice Theory perspective, this fragmentation disproportionately harms the intended beneficiaries, youth and matric-level employees, as it creates a confusing and inaccessible system. Establishing formal coordination bodies, shared digital platforms for information exchange, and regular multi-stakeholder forums are essential to synchronise efforts, ensure that all parties are working towards common goals, and create a seamless pathway for individuals from education to employment (European Training Foundation, 2021).

3. Lack of stakeholder buy-in

For a PPP to be successful, all parties must be genuinely committed and see clear value in the collaboration (European Training Foundation, 2021). A lack of buy-in, particularly from the private sector, often stems from a perception that partnerships are overly cumbersome or do not address their specific talent needs.

Two participants explicitly identified the challenge of securing genuine commitment. The direct excerpts of the participants are as follows:

P4: (Policymaker): *"Promising initiatives fail due to limited resources, lack of stakeholder buy-in, or bureaucratic hurdles."*

P3: (Policymaker): identified *"stronger public-private partnerships and longer-term planning"* as critical for success, implying that current buy-in is insufficient.

According to a study by Moses et al. (2021), a lack of sustained senior-level commitment is a common cause of PPP failure. Moreover, the authors found that partnerships that actively involve private-sector partners in the design and governance phases, rather than merely as funders, are significantly more likely to secure long-term buy-in and achieve their objectives.

4.3.4.2 Subtheme 4.2: Funding and Scalability of Initiatives

Subtheme 4.2 is based on the financial models required to move successful pilot programmes to a scale that can meaningfully impact national unemployment figures. The

literature on educational economics emphasises that sustainable funding must be blended, leveraging public funds to de-risk private investment and ensure programmes can be expanded beyond an initial proof-of-concept (SSACI, 2024). The absence of scalable funding models results in a landscape of fragmented, small-scale projects with limited systemic impact.

Significantly, participants across all categories highlighted the need for larger, more reliable, and scalable funding mechanisms.

The categories relating to this subtheme are discussed in the following section.

1 Need for large-scale, fully funded bursaries

Financial constraints for individuals remain the primary barrier. Participants consistently pointed to the need for comprehensive bursaries that cover not only tuition but also ancillary costs, delivered at a scale that can address the massive demand (DHET, 2023).

A notable eight participants proposed fully funded bursaries as a key intervention. The verbatim quotations of the participants are as follows:

P2 (Unemployed Youth): *"Providing fully funded bursaries or scholarships."*

P15 (Matric-Level Employee): *"Providing fully funded bursaries or scholarships."*

P24 (Unemployed Youth): *"If I could change one thing, it would be making skills programmes free and easily accessible."*

These statements are supported by the literature, which suggests that targeted, full-cost bursaries are among the most effective ways to enable access for the "missing middle" (Spaull, 2019). Partnerships that pool resources from multiple corporations and the government to create large-scale bursary funds can achieve economies of scale and a far greater impact than individual, company-specific programmes.

2 Expansion of accessible, scalable learnerships

Learnerships, which combine theoretical learning with practical workplace experience (Dujala Consulting, 2025), were repeatedly cited as highly effective. However, their availability is often limited and highly competitive, particularly in rural areas.

Four participants specifically advocated expanding learnerships and apprenticeships. The direct excerpts of the participants are as follows:

P10: (Unemployed Youth): *"Expanding learnerships and apprenticeships."*

P13: (Matric-Level Employee): *"Expanding learnerships and apprenticeships."*

P11: (HR Professional): *"Expanding learnerships and apprenticeships."*

This is supported by the literature, which states that work-integrated learning models, such as learnerships, are critical for bridging the gap between theory and practice and enhancing graduates' employability (Noe et al., 2017). PPPs that coordinate the standardisation and massification of quality learnerships across industries can significantly increase youth placement into meaningful career pathways.

3 Sustainable funding models beyond initial levies

A critical challenge for scaling Public-Private Partnerships (PPPs) identified in the study is the over-reliance on initial seed funding or mandatory levies, which are often insufficient and short-term (Turley & Semple, 2013). Participants highlighted the need to develop innovative, sustainable funding models to ensure the longevity and expansion of successful skills development initiatives beyond their pilot phases.

The need for more robust and enduring financial mechanisms was a concern for those focused on long-term impact. The verbatim quotations of the participants are as follows:

P4: (Policymaker): cited *"Budget limitations"* as a key reason why promising initiatives fail, pointing to the inadequacy of current funding.

P8: (HR Professional): highlighted *"budget delays"* as a systemic bottleneck, underscoring the instability of existing funding streams.

P24: (Unemployed Youth): argued for making *"skills programmes free and easily accessible,"* a goal that requires sustainable investment beyond one-off grants.

This is supported by literature on educational economics, which advocates for blended finance models that leverage public funding to de-risk and catalyse larger-scale private investment (Arndt et al., 2024). From a Human Capital Theory perspective, treating skills development as a public good worthy of long-term, diversified investment is essential for national economic growth. Sustainable models could include industry-wide skills funds

co-financed by multiple companies, outcomes-based financing where payments are tied to successful employment placements, and social impact bonds, thereby creating a resilient financial foundation for systemic change.

4.3.4.3 Subtheme 4.3: Alignment and Implementation

Subtheme 4.3 concerns the practical implementation of PPPs, ensuring that programmes are not only well-funded but also effectively designed and monitored to deliver tangible outcomes (Bora, 2025). A recurring issue is the misalignment between educational outputs and industry needs, which can only be rectified through deep, structural collaboration.

The next section discusses the categories related to this subtheme.

1 Aligning education curricula with industry needs

A persistent critique from both employers and employees is that the content of educational programmes is often outdated and disconnected from the practical skills required in the workplace (Romans & Bilson, 2024).

A significant number of participants identified curriculum alignment as a top priority for change. The verbatim quotations from the participants are provided below.

P1: (Matric-Level Employee): prioritised *"Align education curricula with industry needs."*

P3: (Policymaker): prioritised *"Align education curricula with industry needs."*

P5: (Policymaker): stated, *"A recurring challenge is ensuring that educational institutions are producing graduates with relevant skills. Industry often complains that matric-level employees are underprepared."*

According to the literature, this alignment is a core function of successful PPPs. SSACI (2024) emphasises that partnerships must establish formal structures for industry to provide ongoing input into curriculum development at TVET colleges and other training providers. This ensures that graduates possess the specific technical and soft skills employers demand, thereby increasing ROI for both the individual and participating companies.

2 Strengthening monitoring and accountability of outcomes

Without robust mechanisms for monitoring, evaluation, and accountability, it is

impossible to determine whether a PPP is achieving its intended impact or to make data-driven improvements (UNESCO, 2024).

Two participants specifically highlighted the need for better monitoring and accountability. The direct excerpts of the participants are as follows:

P17: (Matric-Level Employee): proposed to *"Improve monitoring and accountability of training outcomes."*

P4: (Policymaker): *"improving monitoring and evaluation of training effectiveness."*

This is supported by the literature, which states that a focus on measurable outcomes is essential for the long-term sustainability of PPPs (Arndt et al., 2024). Establishing clear Key Performance Indicators (KPIs), such as placement rates, salary increases, and employer satisfaction, and publicly reporting on them builds credibility, ensures accountability, and enables continuous programme refinement to maximise impact.

3 Creating clear pathways from training to employment

A fundamental implementation gap identified in skills development initiatives is the frequent lack of a guaranteed or clearly articulated bridge from the completion of a training programme to secure employment. Without this direct pathway, even successful upskilling does not translate into economic participation, leading to frustration and a loss of faith in the system among participants (McGrath et al., 2025).

The critical need for this direct link was emphasised by unemployed youth and employees seeking advancement. The verbatim quotations of the participants are as follows:

P9: (Unemployed Youth): envisioned that a perfect programme would combine *"training, practical experience, and guaranteed placement."*

P24: (Unemployed Youth): stressed the need for *"pathways that combine training with placement."*

P2: (Unemployed Youth): called for *"clear steps to access work experience, internships, or learnerships,"* highlighting the need for structured transitions.

This is supported by the literature on school-to-work transitions, which confirms that programmes with a direct line of sight to a job are significantly more effective in achieving sustainable employment outcomes (SSACI, 2024). From a Human Capital Theory perspective, the value of the training investment is only fully realised upon its productive application in the labour market. Effective Public-Private Partnerships must, therefore, institutionalise these pathways by embedding employment guarantees, dedicated internship slots, or direct absorption agreements with partner companies into the design of training programmes from the outset, thereby ensuring that the development of human capital is directly and efficiently converted into economic activity (European Training Foundation, 2021).

4.3.4.4 *Summary of Theme 4*

In Theme 4, it is evident that PPPs are universally regarded as the essential vehicle for systemic change in skills development (European Training Foundation, 2021). However, their success is contingent on overcoming significant challenges. The primary obstacles identified are coordination and governance issues, including bureaucratic inertia and a lack of deep stakeholder buy-in. Furthermore, funding models must be re-evaluated to enable the scalability of successful interventions, such as fully funded bursaries and expanded learnerships. Finally, effective implementation requires a relentless focus on aligning education with industry needs and strengthening monitoring and accountability frameworks to ensure tangible outcomes. These findings underscore that successful PPPs are not merely about bringing parties together, but about creating sophisticated, well-managed ecosystems that can deliver coherent, large-scale, and impactful pathways from education to employment.

4.4 CHAPTER SUMMARY

This chapter analysed the qualitative data generated from 25 participants in this study. Four primary themes, ten subthemes, and numerous categories were defined and communicated using participant-generated evidence and literature.

These study findings showed the continued barriers to entry for matric-level employees and unemployed youth, which are mainly financial and information-related, systemic (The Missing Middle), and personal-related. Second, although the critical elements of effective HR interventions are understood. For instance, in structured pathways, mentorship, and

open paths to promotion, the gap between theory and practice is significant, and training is often reactive and compliance-driven. It also showed strong agreement that corporate investment in skills development was indeed an economic necessity and clearly described the Return on Investment from increased operational efficiency and reduced staff turnover.

This prospective potential, though, is undermined by limitations within the current Skills Development Levy structure and by a compliance mindset amongst organisational leaders. Ultimately, Public-Private Partnerships were indicated as the driving force for transforming the system. However, to be effective, they need to address coordination problems, access reliable, manageable financial solutions, and align education with industry. Finally, the study points out that there must be an integrated approach that considers the individual barriers and that an appropriate national policy must facilitate this.

The next chapter highlights the study's results and implications.

CHAPTER FIVE

CONCLUSIONS, RECOMMENDATIONS AND LIMITATIONS

5.1 INTRODUCTION

This chapter will provide a summary of the previous chapters. Following this, a summary of the research findings, as outlined in chapter four, is provided, supported by the pertinent information obtained from the literature review. The study's primary objective was to identify the key barriers and effective strategies to enhance access to qualifications among matric-level employees and unemployed youth in South Africa. In addition to the study's limitations, the recommendations based on the study's findings and those for future research will be presented.

5.2 RESEARCH OBJECTIVES

The recommendations are informed by the following research objectives.

1. Assess the effectiveness of current HR interventions in upskilling employees who hold a Matric with full qualifications.
2. Identify barriers preventing matric employees from accessing higher qualifications.
3. Evaluate the feasibility of economic policies mandating corporate funding for youth education across industries.
4. Determine strategies for public-private partnerships to strengthen government-led education initiatives.

5.2.1 Purpose

The purpose is to explore how strategic HR and economic interventions can reduce educational disparities, enhance skills among matric employees, support government efforts to educate youth across South Africa's labour force, and foster productivity and equity.

5.2.2 Objectives

1. Assess the effectiveness of current HR interventions in upskilling employees who hold a Matric with full qualifications.
2. Identify barriers preventing matric employees from accessing higher qualifications.

3. Evaluate the feasibility of economic policies mandating corporate funding for youth education across industries.
4. Determine strategies for public-private partnerships to strengthen government-led education initiatives.

5.3 SUMMARY OF THE CHAPTERS

Chapter one provided context for the study, which emphasised the significance of addressing the skills gap and unemployment crisis among matric-level individuals in South Africa. The introduction resulted in the development of a clearly articulated problem statement. In addition, the study's primary and secondary objectives were outlined, followed by the primary and secondary research questions. Considering this, an initial literature review was conducted to identify and describe the study's key concepts. These included barriers to education access, HR interventions, economic policy frameworks, and Public-Private Partnerships. Other important aspects embedded in chapter one includes the research methodology, definitions of key terms, and ethical considerations throughout the conduct of this research.

Chapter two detailed the study's theoretical background and literature review. The literature review was presented under four main topics, which include (1) historical and structural barriers to education, (2) HR and organisational development interventions, (3) economic policy and funding models, and (4) Public-Private Partnership frameworks. The study's theoretical foundation - Human Capital Theory, Social Justice Theory, and Resource-Based View - were described and discussed.

Chapter three describes the research design theory and methodology pertinent to the study. The research approach used to conduct this study, namely a mixed-methods approach with qualitative dominance, was highlighted. Furthermore, the interpretivist research paradigm served as the basis for this investigation. A total of 25 participants across four stakeholder categories were engaged through surveys and interviews. The results were analysed using reflexive thematic analysis, in which themes and categories were identified. The essential features of data trustworthiness and ethical guidelines were strictly adhered to throughout this research.

Chapter four presented the research findings, which were analysed using thematic analysis. The themes and categories that emerged from the data collection with the participants yielded these results. Before delving into the research questions, the chapter

presented and discussed the participants' demographic information. The findings from the research questions were presented through four main themes and their respective subthemes. The results were supported by peer-reviewed literature and interpreted through the conceptual framework.

Chapter five provides a summary of the dissertation, the summary of findings, the recommendations, and the limitations of the study.

5.4 SUMMARY OF FINDINGS

This study explored the barriers and strategies for enhancing qualification access among matric-level employees and unemployed youth. The findings will be presented next by addressing each research question.

5.4.1 What are the key barriers preventing matric-level employees and unemployed youth from accessing higher qualifications?

This section sought to identify the primary obstacles that prevent individuals from pursuing further education. The findings revealed three distinct but interconnected barriers. Financial constraints emerged as the most significant barrier, with participants citing tuition fees and transport costs as insurmountable obstacles. Informational barriers were equally critical, with many participants demonstrating limited awareness of available bursaries, courses, and career guidance opportunities. Systemic barriers, particularly the "Missing Middle" phenomenon where matric-level individuals are overlooked for development opportunities due to qualification biases, were identified as a major demotivating factor. These findings are supported by the literature, which suggests that financial exclusion and structural inequities perpetuate skills gaps in South Africa (Spaull, 2019; Van der Berg, 2002).

5.4.2 How effective are current HR interventions in facilitating career progression for matric-level employees?

This section investigated the implementation and impact of current human resource development practices. The findings revealed a significant gap between theoretical understanding and practical implementation of effective HR interventions. While

stakeholders universally acknowledged the components of meaningful career pathways - including structured training, mentorship, and clear progression opportunities - the reality was characterised by reactive, compliance-driven training decisions. Short-term workshops predominated over long-term qualification support, and strategic planning for matric-level staff development was notably absent. These findings align with literature critiquing the compliance mindset in skills development (Noe et al., 2017; Moses et al., 2021).

5.4.3 What is the feasibility of economic policies and corporate funding models in supporting skills development?

This section examined the economic arguments and policy frameworks supporting skills investment. The findings demonstrated clear consensus on the economic returns of investing in matric-level employees, with participants articulating benefits such as improved efficiency, reduced turnover, and measurable ROI within 2-4 years. However, the current Skills Development Levy model was widely perceived as insufficient or misdirected, fostering compliance rather than strategic investment. A critical barrier identified was the prevailing compliance mindset among organisational leaders, who view skills development as a regulatory requirement rather than a strategic imperative. These findings are supported by economic literature advocating for strategic human capital investment (Arndt et al., 2024; SSACI, 2024).

5.4.4 What is the role of Public-Private Partnerships in creating sustainable pathways for education and employment?

This section explored collaborative models for scaling skills development. The findings positioned PPPs as essential mechanisms for systemic change but highlighted significant implementation challenges. Coordination and governance issues, including bureaucratic inertia and lack of stakeholder buy-in, were identified as major obstacles. Participants emphasised the need for scalable funding models for initiatives such as fully funded bursaries and expanded learnerships. Critical success factors included rigorous alignment of education with industry needs and strengthened monitoring and accountability frameworks. These findings corroborate literature on multi-stakeholder approaches to skills development (SSACI, 2024; Moses et al., 2021).

5.5 ALIGNMENT WITH RESEARCH OBJECTIVES

5.5.1 Objective 1: Assess the effectiveness of current HR interventions in upskilling matric-level employees

The literature and sector-specific examples provide strong evidence that HR interventions, particularly Recognition of Prior Learning (RPL), apprenticeships, and structured internships, play a vital role in supporting matric-level employees' transition from short-course learning to full qualifications. Case studies in the insurance sector (GENRIC, Innovation Group), retail (PnS Group), and banking demonstrate tangible gains in employability, technical competence, workplace readiness, and career mobility (Moses et al., 2021; Swiss-South African Cooperation Initiative, 2024). These initiatives are viewed positively by HR professionals, especially when supported by SETA grants, National Skills Fund (NSF) contributions, and organisational mentorship frameworks (Republic of South Africa, 1998; McGrath, 2012).

5.5.2 Objective 2: Identify barriers preventing matric employees from accessing higher qualifications

Despite their potential, these interventions are limited by persistent systemic and individual barriers. Systemic challenges include fragmented SETA processes, inconsistent funding, weak articulation between short courses and accredited qualifications, and limited institutional coordination. On an individual level, financial hardship, low awareness of RPL and learnership options, and socio-economic constraints—particularly poverty and rural marginalisation—reduce participation and progression (NSFAS, 2023; Spaul, 2019; Reddy, 2023). These barriers confirm that HR interventions alone are insufficient without broader structural reforms.

5.5.3 Objective 3: Evaluate the feasibility of economic policies mandating corporate funding for youth education

Insights from the banking, insurance, and public sectors suggest that policy mechanisms mandating corporate contributions, such as expanded skills levies and tax-incentivised funding streams, are viable tools for expanding access to education and training (Arndt et al., 2024; National Planning Commission, 2012). Although the Skills Development Act (SDA) provides a legislative platform through the levy-grant system, current practice often prioritises compliance requirements over long-term qualification pathways. Stakeholder perspectives indicate that economic policies could be effective if they offer clear incentives, align funding with skills demand, and integrate seamlessly with national funding initiatives (DHET, 2022; Bhorat, 2023).

5.5.4 Objective 4: Determine strategies for public-private partnerships to strengthen government-led education initiatives

The review clearly demonstrates the centrality of PPPs in bridging the divide between training supply and labour market demand. Successful models—such as the NPA Finance Internship, GENRIC Insurance learnerships, and INSETA-supported banking programmes illustrate how shared funding, structured mentorship, and coordinated planning improve matric-level employees' progression into skilled roles (Swiss-South African Cooperation Initiative, 2024; Moses et al., 2021). Effective PPPs require strong governance via SETA chambers, reliable labour market intelligence, co-funded qualifications, and well designed RPL pathways aligned to the National Qualifications Framework (Republic of South Africa, 1998; Draissi et al., 2023b).

5.6 RECOMMENDATIONS OF THE STUDY

In this section, the recommendations are based on the study's findings and recommendations for further research.

5.6.1 General recommendations

Based on the study's findings and conclusions, the following general recommendations can be made:

It is necessary that the government and policymakers create a platform that integrates information on bursaries, learnerships, apprenticeships, and training, making it more readily available in one location for consumers. A platform like this will help fill the information gaps that many employees and unemployed youth in the post-matric workforce face. The government can also encourage businesses to invest in education and offer higher tax incentives for firms that fund accredited qualifications, especially for professionals with only a matric certificate. Strengthening and streamlining the mechanisms for Recognition of Prior Learning would improve access to formal qualifications across industries. For this reason, well-defined governance frameworks for Public-Private Partnerships must be bolstered by targeted accountability measures and national skills development strategies to ensure coordinated and effective implementation at the national level.

Those in organisational and HR roles should move away from a compliance-led focus towards a strategic, long-term orientation to workforce capability. Organisations should develop explicit, stepwise career paths with clear progression criteria, well-defined pathways to follow, and transparent ways to support progression, mentoring, and coaching for staff, helping matric-level employees achieve development. There needs to be funding policies that are open and equitable to support full qualifications rather than short, unaccredited courses. It is recommended that organisations make sure that such initiatives are based on enabling programmes for inclusive talent development, such as training programmes, so that the employees receive the education for a matric and in these programs, a person can take up trained positions in an organisation, which will help them build on their skills and will ultimately ensure their employability in the future.

Educational institutions play a pivotal role in this environment. This will drive closer collaboration with industry to ensure the delivery of aligned curricula with the current and future skills needed on the job. Working adults will then have more access to education through increasingly flexible learning modalities, ranging from blended and online to part-

time. Career guidance and placement services, especially in rural and marginalised communities, will reinforce how individuals navigate opportunities. Lastly, the introduction of bridging and foundation programmes will help matric-level entrants meet the academic standards of higher education and better prepare them to enter these higher learning pathways.

5.6.2 Recommendations for further research

This study aimed to explore barriers and strategies for enhancing qualification access among matric-level individuals. The following recommendations are proposed for future research:

- A longitudinal study tracking the career progression and ROI of employees who receive substantial skills development investment compared to those who do not
- Quantitative research measuring the correlation between specific HR interventions (mentorship, structured pathways) and retention rates of matric-level employees
- Comparative analysis of successful PPP models in skills development across different emerging economies
- Investigation into the specific leadership and organisational culture factors that enable the shift from compliance to a strategic mindset in skills investment
- Research focusing on the unique challenges and opportunities for rural youth in accessing skills development programmes

5.7 LIMITATIONS OF THE STUDY

The researchers acknowledged that the success of a research project depends on the availability of a range of resources, including access to participants and sufficient time. The study was limited to 25 participants across four stakeholder categories, which, while providing rich qualitative data, limits the statistical generalizability of the findings. The research focused primarily on the insurance, finance, retail, and public service sectors in specific geographical areas, which may not fully represent the diversity of challenges across all industries and regions in South Africa. Additionally, the study relied on self-reported data from participants, which may be subject to social desirability bias. Lastly, while the mixed-methods approach provided depth, a more extensive quantitative component might have strengthened the generalizability of the conclusions.

5.8 THE EXPECTED CONTRIBUTION OF THE STUDY

This study will contribute to the discipline's body of knowledge by identifying the complex interplay of barriers preventing qualification access and providing multi-stakeholder strategies to enhance skills development for matric-level individuals. The research demonstrates the practical application of Human Capital Theory, Social Justice Theory, and Resource-Based View in understanding and addressing skills development challenges. The findings will assist organisations in developing more effective talent management strategies for entry-level staff, guide policymakers in designing more responsive skills development policies, and provide a framework for more effective Public-Private Partnerships.

5.9 CHAPTER SUMMARY

This final chapter summarised all the preceding chapters. After that, the findings from this study were discussed and strengthened by the relevant literature. Based on the findings of this study, conclusions were drawn and recommendations for enhancing access to qualifications among matric-level employees and unemployed youth were presented. In addition to the recommendations for future research, the study's limitations were also provided. The chapter and study conclude by emphasising that addressing the skills development challenge requires an integrated, multi-stakeholder approach that simultaneously addresses financial, informational, systemic, and personal barriers through collaborative effort between individuals, organisations, and the state.

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APPENDIX A – INFORMED CONSENT



NWU Business School
Private Bag x6001
Potchefstroom, 2520

<http://commerce.nwu.ac.za/business-school>

25 June 2025

DEAR PARTICIPANT

INFORMED CONSENT TO COMPLETE INTERVIEW

You are invited to take part in a research study that forms part of a Master of Business Administration (MBA) degree. Please take some time to read the information presented here, which will explain the details of this study. Please ask the researcher or person explaining the research to you any questions about any part of this study that you do not fully understand. It is very important that you are fully satisfied that you clearly understand what this research is about and how you might be involved. Also, your participation is entirely voluntary, and you are free to say no to participating, this will not affect you negatively in any way whatsoever. You are also free to withdraw from the study at any point, even if you do agree to take part now.

This study has been approved by the NWU Economic and Management Sciences Research Ethics Committee (EMS-REC) and will be conducted in accordance with the ethical guidelines and principles of the North-West University and other international ethical guidelines applicable to this study.

Title of the project: Strategic, human resources and economic perspectives on education disparities within the South African labour force

Institution: NWU Business School

Ethics Reference Number: NWU-00851-25-A4

Names and contact details of project staff

	Supervisor	Researcher
Title, name & surname	Prof Anne-Marie Pelser	MS Tshililo Tshikosi
Full Names	Anna, Magrieta, Fredrika, Pelser	Tshililo Tshikosi
Function in Project	Principle Investigator	Researcher
Telephone	0823756636	0605289992

What is this research study all about?

To tackle educational inequalities in South Africa's workforce by examining **HR and economic strategies** to close the skills gap. To explore ways to enhance qualifications for employees who hold a Matric qualification and reduce youth unemployment, we will engage with **workers, unemployed youth with matric, HR professionals, and policymakers**. Their perspectives will help uncover obstacles to further education, evaluate corporate investment in training, and develop solutions to boost workforce readiness. This study explores how strategic HR and economic interventions can address educational disparities in South Africa's labour force across manufacturing, services, and finance sectors. You are invited to participate in a 45–60-minute interview to share your experiences.

Procedure: The interview will be conducted in person (Johannesburg/Cape Town) or via Zoom (rural participants), audio-recorded, transcribed, and anonymised using pseudonyms. You may withdraw at any time without consequence. Findings will be shared via email, with a presentation offered upon request.

Confidentiality: Your identity will be protected using pseudonyms. Data (recordings, transcripts) will be stored on a password-protected server for three years post-study (until August 2028), then deleted using secure erasure software. Physical notes will be stored in a locked cabinet and shredded after three years, per the Protection of Personal Information Act (POPIA) (South Africa, 2013).

Risks and Benefits: There are no anticipated risks. Discussing unemployment or barriers may cause discomfort; a distress protocol provides referrals to local counselling

services. Benefits include contributing to policy solutions for equitable education. No incentives are offered to ensure voluntary participation.

What will be expected of you?

You will be expected to:

- Complete the interview, which should take approximately 45 minutes of your time.
- Respond to the questions in an open and honest manner.

Please note that your responses are completely anonymous, and no personally identifiable data will be collected.

DECLARATION

Declaration by participant

By selecting the option below, I agree to take part in the research study titled: **Strategic, human resources and economic perspectives on education disparities within the South African labour force**

1. I confirm that I have read the information sheet for the above study. I have had the opportunity to consider the information, ask questions, and have these answered satisfactorily.
2. I understand that as I have completed the study anonymously it will not be possible to remove any information I have provided, as you will not be able to identify me in any way.
3. I understand that individuals from the University may look at anonymous research data collected during the study to ensure that the study is conducted appropriately.
4. I agree that my anonymous information can be shared with individuals from the project team detailed above.

Consent Boxes

I agree to take part in the above study

Yes	No

- ☐ I confirm that I have read and understood the information provided
- ☐ I understand that I may withdraw my consent at any time by providing written notice
- ☐ I accept the terms and conditions outlined

APPENDIX B – INTERVIEW SCHEDULE

INTERVIEW SCHEDULE

Title: Strategic, human resources and economic perspectives on education disparities within the South African labour force

Purpose: To explore how educational disparities affect South Africa's labour force and identify strategic HR and economic interventions to upskill matric-level employees and reduce youth unemployment.

Institution: NWU Business School

****The Interview will consist of a Hybrid of questions, including open-ended questions and Multiple choice questions**

SECTION 1: INTRODUCTION

Consent & Purpose of the Interview

Thank you for agreeing to participate in this research. This study examines **Strategic, human resources and economic perspectives on education disparities within the South African labour force** and how this can address skills gaps for matric-level employees and unemployed youth without matric. Your perspectives will contribute to identifying barriers to further education and formulating strategies to improve employability and economic outcomes. Participation is entirely voluntary, and you may withdraw at any point should you feel uncomfortable.

Do you have any questions before we proceed?

SECTION 2: PARTICIPANT BACKGROUND

1. Age

- 21–25
- 26–30
- 31–35
- 36–40

2. Case/Sector (Industry/Field)

- Insurance
- Public services
- Finance
- Retail
- Other

3. Part. Type (Participant Type)

- Matric-Level Employee
- Unemployed Youth
- HR Professional
- Policymaker

4. Geographical Location

- Urban
- Semi-urban
- Rural

5. What is the highest level of education you have attained?

- Matric / Grade 12
- Diploma / Certificate
- Bachelor's degree
- Postgraduate qualification

6. Employed

- Yes
- No

7. How long have you been in your current position or unemployed?

- Less than 1 year
- 1–3 years
- 4–6 years
- 7–10 years
- More than 10 years

8. Household income

- <R5k
 - R5k-15k
 - R15k-30k
 - R30k
- Could you please provide a brief introduction, including your current occupation and employment status?
 - What is the highest level of education you have attained?
 - How long have you been in your current position or, if applicable, unemployed?
 - Which industry do you currently work in, or which sector do you aspire to enter?

SECTION 3: EDUCATIONAL BARRIERS

- What obstacles have you encountered in pursuing education beyond the matric level?
(Addresses Secondary RQ 1: What hurdles stop matric employees from earning full qualifications?)
- Could you identify specific financial, institutional, or personal factors that have impeded your ability to obtain higher qualifications?
Prompt: For instance, were there challenges related to funding, access to educational institutions, or personal circumstances?
- In what ways has your current educational attainment influenced your career progression or employment opportunities?
- From your perspective, what forms of support—whether governmental, corporate, or community-based—would enable more individuals to pursue advanced qualifications?

SECTION 4: HR INTERVENTIONS & WORKPLACE SUPPORT

- Does your employer provide training opportunities, bursaries, or study assistance for employees whose highest qualification is matric?
(Addresses Secondary RQ 2: How can strategic HR interventions help matric employees gain qualifications for all industries?)
- Have you engaged in any workplace training or upskilling initiatives? If so, could you describe your experience?
Prompt: Was it a short-term course or a more comprehensive programme, and how did it impact your role?
- What types of educational opportunities—such as apprenticeships, diplomas, or digital learning platforms—do you believe would most benefit employees with only a matric qualification?
- How might human resource policies be refined to better facilitate skills development across various industries?

SECTION 5: ECONOMIC POLICIES & CORPORATE FUNDING

- Are you familiar with any corporate-sponsored education programs or bursaries available within your industry or region?
(Addresses Secondary RQ 3: How can economic policies push corporations to fund government education drives for youth?)
- What are your views on corporations increasing their investment in employee and youth education beyond the current 1% skills levy requirement?
- Do you consider existing government policies—such as Broad-Based Black Economic Empowerment (B-BBEE), Sector Education and Training Authorities (SETAs), or the National Development Plan 2030—effective in reducing education and employment disparities? Please explain your reasoning.
- What role should private sector organisations play in funding or supporting educational initiatives for matric-level employees and youth?

SECTION 6: SOLUTIONS & RECOMMENDATIONS

- What do you believe would be the most effective approach to enabling matric-level employees and unemployed youth to achieve full qualifications?
(Addresses Primary RQ: How can strategic, human resource, and economic interventions curb education disparities and boost workforce productivity in South Africa?)
- If you were tasked with altering one aspect of workplace training or national education policy, what change would you prioritise, and why?
- Are there additional insights or suggestions you would like to offer to enhance education and employment prospects in South Africa?

MULTIPLE CHOICE QUESTIONS

SECTION 1: BARRIERS TO FULL QUALIFICATIONS (Objective 1)

Target Group: Matric-Level Employees, Unemployed Youth

1. **What do you see as the biggest barrier to obtaining qualifications beyond matric?**
 - A) Lack of financial resources (e.g., fees, transport costs)
 - B) Limited access to quality education institutions (e.g., distance, availability)
 - C) Insufficient information about opportunities (e.g., bursaries, courses)
 - D) Employer or societal expectations limiting further study
 - **Follow-up:** Can you explain how this barrier has affected you personally?
2. **How easy is it for you to access further education or training opportunities?**
 - A) Very easy – many options are available and affordable
 - B) Somewhat easy – some options exist but with challenges
 - C) Difficult – few options and significant obstacles
 - D) Nearly impossible – no realistic options
 - **Follow-up:** What makes it easy or difficult for you?

SECTION 2: STRATEGIC HR INTERVENTIONS (Objective 2)

Target Group: Matric-Level Employees, HR Managers

3. **How effective is your current workplace training (or lack thereof) in helping you gain skills for better roles?** (For Employees)
How effective are your company's training programs for matric-level employees? (For HR Managers)
 - A) Very effective – provides full qualifications (e.g., diplomas, degrees)
 - B) Somewhat effective – offers short courses but not enough
 - C) Ineffective – minimal or no training provided
 - D) Not applicable – no training exists
 - **Follow-up:** What could improve the training you receive or provide?
4. **What type of HR support would best help matric-level employees move to skilled positions?**
 - A) Funding for full tertiary qualifications (e.g., degrees, diplomas)
 - B) On-the-job training with mentorship
 - C) Short skills courses (e.g., 3–6 months)
 - D) Career guidance and awareness programs
 - **Follow-up:** Why do you think this option would work best?

SECTION 3: ECONOMIC POLICIES AND CORPORATE FUNDING (Objective 3)

Target Group: HR Managers, Policymakers

5. **How willing do you think companies are to fund government education initiatives beyond the current 1% skills levy?**
 - A) Very willing – they see long-term benefits
 - B) Somewhat willing – if incentivised (e.g., tax breaks, B-BBEE points)
 - C) Reluctant – prefer short-term compliance over investment
 - D) Unwilling – view it as government's responsibility
 - **Follow-up:** What would encourage (or discourage) companies to contribute more?
6. **What policy change could best push companies to fund youth education across all industries?**

- A) Stricter laws mandating higher contributions
- B) Tax incentives for funding full qualifications
- C) Public-private partnerships with clear goals
- D) No change – current policies are sufficient
- **Follow-up:** How do you see this change impacting education and employment?

SECTION 4: YOUTH UNEMPLOYMENT AND BROAD EDUCATION (Objective 4)

Target Group: Unemployed Youth, Policymakers

7. **What skill or qualification do you think would most improve your job prospects?** (For Youth)

What qualifications should youth be trained in to reduce unemployment?
(For Policymakers)

- A) Technical skills (e.g., engineering, IT, trades)
 - B) Professional degrees (e.g., finance, health)
 - C) Vocational diplomas (e.g., hospitality, logistics)
 - D) Basic employability skills (e.g., communication, literacy)
 - **Follow-up:** Why do you think this would make a difference?
8. **How much would access to fully funded education across industries reduce youth unemployment?**
- A) Significantly – could cut it by more than half
 - B) Moderately – some improvement but not transformative
 - C) Minimally – other factors matter more (e.g., job creation)
 - D) Not at all – education alone won't solve it
 - **Follow-up:** What else needs to happen to lower unemployment?

SECTION 5: OVERALL PERSPECTIVES (All Groups)

9. **How important is it to address education disparities for South Africa's future workforce?**
- A) Critical – it's the top priority for growth and equity
 - B) Important – one of many key issues
 - C) Somewhat important – matters but not urgent
 - D) Not important – other problems are bigger
 - **Follow-up:** Why do you feel this way?
10. **Who should take the lead in fixing education disparities in the labour force?**
- A) Government – through policy and funding
 - B) Private companies – through investment and training
 - C) A partnership between the government and companies
 - D) Individuals – through self-initiative
 - **Follow-up:** What role should the others play if your choice leads?

SECTION 7: CLOSING

Thank you for dedicating your time and providing such valuable input. Your contributions will inform strategies to reduce educational disparities and strengthen South Africa's labour force. Would you be willing to participate in a follow-up discussion if further clarification is needed? Do you have any final questions or remarks before we conclude?

APPENDIX C – COMPANY CONSENT LETTER



NWU Business School
North-West University
Private Bag x6001
Potchefstroom, 2520

<http://commerce.nwu.ac.za/business-school>

Dear Madam

Goodwill permission: a study conducted at Telesure Investment Group

I hereby request your permission for Telesure to participate in this research, which involves conducting semi-structured interviews with hybrid questions (multiple-choice and open-ended) with selected employees to explore Educational Disparities And Potential Solutions Within South Africa's Labour Force. Before granting permission, please familiarise yourself with the information below.

The details of the project are as follows:

Title Of The Project:

Strategic, human resources and economic perspectives on education disparities within the South African labour force

Project Supervisor:

Prof Anna-Marie Pelser

Address:

110 Thabo Mbeki Way, Potchefstroom, 2520

Contact Number:

018 299 1377

Member Of Project Team MBA Student:

Tshililo Tshikosi

Address:

The Parks Lifestyle Apartments, Fourways

Contact Number:

060 528 9992

Ethics Committee Of The Faculty Of Economic And Management Sciences (EMS-REC)

chairperson: Prof Mark Rathbone

committee administrative coordinator: Ms Dalene Vorster (018 299 1529)

This study has been approved by the research ethics committee of the faculty of Economic & Management Sciences Of The North-West University and will be conducted in accordance with the ethical guidelines of this committee.

Ethics application number:

NWU-00851-25-A4



Potchefstroom Campus: (+27) 18 299 1406

Mahikeng Campus: (+27) 18 389 2095

Vanderbijlpark Campus: (+27) 16 910 3011

What is this research about?

This study explores how strategic HR and economic interventions can address educational disparities in South Africa's labour force across manufacturing, services, and finance sectors

Participants

Participants selected will fall into one of the following categories:

- Matric-level employees currently employed at [company name] with only a national senior certificate.
- HR managers at [company name] are involved in training or skills development programmes.

What is expected of the participants?

Participants will be expected to:

- Participate in a 45–60 minute semi-structured interview with the researcher, featuring hybrid questions (multiple-choice with open-ended follow-ups), at a suitable time and private location without interruptions, conducted via an online platform (e.g., zoom). This will be scheduled by the researcher once approved by the **NWU** ethics committee.
- Respond to the questions openly and honestly.
- Inform the supervisor if they feel or experience any discomfort or distress during the research process and notify the supervisor if they wish to terminate their involvement at any point.

Benefits to the participants

This research study intends to give participants a voice to reveal, explain, and reflect on educational and employment challenges. No monetary reward will be provided for participation in the study. However, they will receive a two-page communication on the study's outcomes, which they can use to inform personal or organisational strategies for skills development.

Risks involved for participants

Participation in this study poses no physical risk to participants, as it involves no physical activities or experiments. We have identified ethical principles that will be consistently upheld to prevent any harm to participants. These principles focus on protecting participants' dignity and ensuring all records remain private and confidential.

Confidentiality and protection of identity

Participants will be assigned a unique participant id (e.g., employee a). Interviews will be recorded and saved with reference to the id, but data collected will be treated as confidential and will not be shared with any third party not directly involved in the research process. Personal details of participants and their direct contributions to the study will not be made public. All records will be retained for a specified period and destroyed by appropriate means. The study's findings will be published but will not include raw data that could implicate individuals. All records will be managed in accordance with POPIA guidelines.

Dissemination of findings

The findings of the study will be used for academic purposes and will contribute to the existing body of knowledge.

If you have any further questions or enquiries regarding participation in this research, please contact the researchers for more information.

Declaration by the relevant responsible person:

By signing below, I...Faith Zincke Agree to give permission for the research to take place with the identified participants in the study entitled:

Strategic, human resources and economic perspectives on education disparities within the South African labour force

I declare that:

- I have read this information and consent form and understand what is expected of the participants in the research.
- I have had a chance to ask questions to the researcher and all my questions have been adequately answered.
- I understand that taking part in this study is voluntary and participants will not be pressurised to take part.
- Participants may choose to leave the study at any time and will not be penalised or prejudiced in any way.
- Participants may be asked to leave the research process before it is completed, if the researcher feels it is in their best interests, or if they do not follow the research procedures, as agreed to.

Signed at (place) Dainfern on (date) 05 / 09 / 2025

FZincke

Signature of relevant responsible person

APPENDIX D - ETHICS APPROVAL LETTER



Private Bag X1290, Potchefstroom
South Africa 2520
Tel: 018 299-1111/2222
Fax: 018 299-4910
Web: <http://www.nwu.ac.za>
Senate Committee for Research Ethics
Tel: 018 299-484
Feziwe.Mseleni@nwu.ac.za

29 September 2025

ETHICS APPROVAL LETTER OF STUDY

Based on approval by the **North-West University Economic and Management Sciences Research Ethics Committee (EMS-REC)** on **29 September 2025**, the Economic and Management Sciences Research Ethics Committee hereby **approves** your study as indicated below. This implies that the North-West University Senate Committee for Research Ethics (NWU-REC) grants its permission that, provided the special conditions specified below are met and pending any other authorisation that may be necessary, the study may be initiated, using the ethics number below.

Study title:	Addressing education disparities within the South African labour force: strategic, human resource, and economic perspectives																																														
Study leader/Supervisor (Principal investigator/Researcher):	Prof A.M. Pelser	University no.:	21707669																																												
Student:	Ms T.L. Tshikosi	University no.:	43289207																																												
Ethics number:	<table border="1"> <tr> <td>N</td><td>W</td><td>U</td><td>-</td><td>0</td><td>0</td><td>8</td><td>5</td><td>1</td><td>-</td><td>2</td><td>5</td><td>-</td><td>A</td><td>4</td> </tr> <tr> <td colspan="3">Institution</td> <td colspan="6">Study number</td> <td colspan="2">Year</td> <td colspan="3">Status</td> </tr> <tr> <td colspan="15">Status: S = Submission; R = Re-submission; P = Provisional authorisation; A = Authorisation</td> </tr> </table>			N	W	U	-	0	0	8	5	1	-	2	5	-	A	4	Institution			Study number						Year		Status			Status: S = Submission; R = Re-submission; P = Provisional authorisation; A = Authorisation														
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Institution			Study number						Year		Status																																				
Status: S = Submission; R = Re-submission; P = Provisional authorisation; A = Authorisation																																															
Application type:	Single study - Postgraduate research		Risk level:	Low/minimal risk																																											
Commencement date:	9/29/25																																														
Expiry date:	9/29/26																																														
Approval of the study is initially provided for a year, after which continuation of the study is dependent on receipt and review of the annual (or as otherwise stipulated) monitoring report and the concomitant issuing of a letter of continuation.																																															

Special in process conditions of the research for approval (if applicable):

<https://acrobat.adobe.com/id/urn:aaid:sc:eu:2e1557a2-3b51-4d40-8194-92b5a633a8e9>

APPENDIX E- TURNITIN SUMMARY/REPORT

Turnitin Originality Report					
Processed on: 19-Nov-2025 07:38 SAST ID: 2820486609 Word Count: 34998 Submitted: 1					
43289207:Tshililo_Tshikosi_MBA_Mini_dissertat... By TL TSHIKOSI	<table><tr><th>Similarity Index</th><th>Similarity by Source</th></tr><tr><td>14%</td><td>Internet Sources: 13% Publications: 8% Student Papers: 3%</td></tr></table>	Similarity Index	Similarity by Source	14%	Internet Sources: 13% Publications: 8% Student Papers: 3%
Similarity Index	Similarity by Source				
14%	Internet Sources: 13% Publications: 8% Student Papers: 3%				

APPENDIX F – LANGUAGE EDITING CERTIFICATE



Dynamic Language &
Translation Specialists

1 Kgaka Street,
Potchefstroom
Tel: 018 293 3046
Cell: 082 878 5183
Language@dlts.co.za
CC No: 1995/017794/23

Sunday, 23 November 2025

To whom it may concern

Re: Certification of language edit, typography and technical precision

The MBA dissertation **"Strategic, human resources and economic perspectives on education disparities within the South African labour force"** by TL Tshikosi (43289207) was edited for language precision. Direct interview quotations from participants were spell-checked only. Citations and references were checked to comply with APA7 guidelines.

Final, last-minute corrections remain the responsibility of the author.

Precision ... to the last letter