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# Black tax’ in South Africa: tracing its roots in colonial and apartheid history.

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# ‘Black Tax’ in South Africa: Tracing its roots in colonial and apartheid history.

By

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Research Report submitted for the degree of

**Master of Arts in Labour and Economic Sociology**

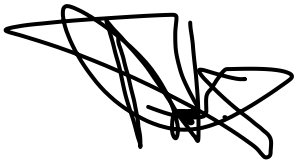
Supervised by

**Shireen Ally**

**December 2021**

## Declaration

I, Nosibabalwe Socikwa, hereby confirm that *'Black Tax' in South Africa: Tracing its roots in colonial and apartheid history* is my work except where I have cited and referenced the original authors. This research report is submitted for the degree of Master of Arts in Labour and Economic Sociology at the University of Witwatersrand (Wits), and I declare that this work will not be submitted to any other institutions other than Wits for the purposes of obtaining a qualification.



**Name and Surname** **Date**

Nosibabalwe Socikwa 10 December 2021

## Research dedication

I dedicate this piece of work to my beloved friend Godknows Musa who during the final writing process of this research report passed away. Your home was my library in trying to write this piece of work. Thank you for having faith in me, for always seeing a potential in me. You have never doubted me for a second. You hold me high. When I think of giving up, I think of people like you, and I continue going. It is so unfortunate that you did not get a chance to see the final product of this work. I however hope I make you proud and become everything I can be. May your soul rest in internal peace. I love you so much.

To the marginalised Blacks trying their best to survive. This work is for you too. I see you; through this piece of work, I recognised your sacrifices, the missed dreams because someone had to take care of the other. I pray good to all of you. For God to give everyone a strength to fight injustices and give momentum for justice. Place the Black community a new resilience, and pour them with love where wounds bleeds. Make a new world possible, where they are no longer suffering.

## Acknowledgments

I give thanks to my Ancestors and God who guide me daily. I am truly grateful for their existence in my life and knowing that with their presence all the things are possible.

**I would also like to acknowledge the following individuals who was part of my journey in completing this piece of work.**

- To my Parents, Nosiphiwo Socikwa and Mangaliso Socikwa, whom because of Black Tax have brought me this far. It has been a journey, your sacrifices of me never go unnoticed, and I am grateful for the little you have shared with me to be where I am today, and my only wish is that you live longer to bear the fruits of your efforts. I appreciate the support; the love and the relationship we have. I love you both.

- To my supervisor Prof Shireen Ally. Thank you so much for your guidance, for constantly supporting me. Your critique and remarkable intellectual inputs have brought me here. When I was doubting myself, you showed me that I am here and that I belong. I thank you for your patience.

- To Dr Hylton White and the Duke University Black Tax Project. Thank you for financially supporting this research. In the midst of a pandemic when working from home has proven to be difficult, you have helped me so much.

- To my siblings Siyabulela Socikwa and Makhwanandile Socikwa and my nephew Khwezi Socikwa. Thank you for being my cheerleaders, for the jokes when the journey became impossible. I needed the laughs to get me back to the groove.

- To, Zwelandile Socikwa, you have become a second dad in my life who speak highly of me. You are the reason I am still in this journey and chasing the Dr

tittle because you believe in my potential more than I believe in myself. For that I am thankful, and I will continue in this academia journey.

- To my friends Anele Mafuya and Promise Maluleke, part of me you carry, while part of me you inspire. Thank you for walking this academic journey with me since the first year of university. Thank you for your support, for granting me an ear to listen to my research ideas. It is a privilege to have good friends like you that feed my spirit and I am so full.

- To everyone that was part of this research, I cannot name all of you but thank you. I see you and I appreciate the support.

## ABSTRACT

**‘Black Tax’ in South Africa: Tracing its roots in colonial and apartheid history.**

This research project tackles the widespread phenomenon of so-called ‘Black Tax’ in contemporary South Africa. It does so through a critical conceptual lens that tries to offer a way of analysing it that also constitutes a critique of post-apartheid South Africa. Summarizing the existing literature on ‘Black Tax’ – an admittedly small but growing literature – the research report identified the studies already conducted as well as the overall debate within which ‘Black Tax’ is framed, i.e., as Ubuntu versus as burden. However, this research wants to side-step that debate by providing a more structural analysis of where and how ‘Black Tax’ emerges as a social phenomenon that is so defining of the experiences of young Black South Africans today. Therefore, this research report reflects a conceptual project. The main arguments being analysed here are that: (1) contemporary ‘Black Tax’ is conditioned by a context of Black immiseration and poverty that is a result of apartheid and colonial histories; (2) contemporary ‘Black Tax’ functions in a similar way to labour migrants’ remittances under apartheid, i.e., as kinship and the wage became tied together in the apartheid cheap labour system.

The structure of this argument lays out the broadest outlines of two analyses which look at “Black tax” in different spheres of South African life, that is to think differently about ‘Black Tax’ than a more conventional sociology research project might. Rather than looking at the experiences of ‘Black Tax’ for young Black professionals, I instead provide an analysis of the colonial and apartheid histories of dispossession of land, labour, and wealth. Using the existing scholarship on the historical constraints on the livelihoods of Black South Africans, this research reviews histories of dispossession of land and labour, and the limits placed on the possibilities of Black wealth creation and accumulation. It also looks at histories of land, labour and livelihoods that incorporated Africans into a cheap labour system and led to post-apartheid forms of impoverishment and incapacitation of possibilities for sustaining livelihoods. This involves looking at colonialism and apartheid as interventions into African kinship relations, specifically leveraging kinship as the extension of the wage and of support for familial livelihoods through remittances.

In pursuing this conceptual project, I do not suggest that the contemporary practice of ‘Black Tax’ is not shaped by post-apartheid entrenchments of the racialised political economy of Black unemployment. Nor am I suggesting that Black poverty is not attributable to the post-apartheid casualisation of permanent employment, or new demands and expectations arising from new forms of racialised consumption and consumerism in post-apartheid South Africa. In fact, I consider those worthwhile areas of study for other researchers. My main aim is not to evaluate Black Tax as either a burden or as Ubuntu, but rather to provide a sociological understanding of the historical context that has made so-called Black Tax a widespread experience for young Black South Africans today.

## Table of Contents

**CHAPTER 1** ..... **1**
1.1 Introduction: Beyond Ubuntu ..... 1
1.2 Problem Statement ..... 5
1.3. Literature Review ..... 6
1.4. A Socio-Historical Approach to Black Tax ..... 10
1.5. Ethical Considerations ..... 10
**Chapter 2: Colonial Histories of Land, Labour, and Wealth in South Africa** ..... **11**
2.1 Introduction to Land, Labour and Wealth. ..... 11
2.2 Contextualising Land, Labour and Wealth in South Africa ..... 12
2.3 Precolonial era in South Africa: Black livelihoods ..... 14
2.4 Post-apartheid Labour in South Africa. ..... 17
2.5 Post-apartheid Wealth in South Africans ..... 18
**CHAPTER 3: Black Tax as Post-Apartheid 'Remittance'** ..... **21**
3.1 Introduction of 'Black Tax' as Post-Apartheid 'Remittance' ..... 21
3.2 "Black tax" as post-apartheid Education ..... 25
3.2 Economic Transformation in Post-apartheid South Africa ..... 27
**4. Chapter 4: Conclusion: Bearing the Brunt of Structural Inequality** ..... **31**
**5. Referencing** ..... **39**

# CHAPTER 1

## 1.1 Introduction: Beyond Ubuntu

I have always thought that post-apartheid South Africa means being free from the systems and policies that operated during the colonial and apartheid history. However, the struggles of Black South Africans continue post-apartheid around socio-economic status, class, gender, and race oppressions. Therefore, Black people are not as free as the South African Bill of Rights ostensibly claims. This is because Black South Africans are still living within structures and institutions that are ravaged by racialised apartheid. In this project, I seek to look at how something called 'Black Tax'[1] may be an instance of such continuing unfreedom for Black South Africans even in the context of the apparent end of apartheid.

Black Tax is defined as a contemporary term which is perceived "as the process through which a Black individual - usually an employed or recent graduate - uses a significant portion of their income and savings to support their immediate and extended family", in the words of Magubane (2016:2). While young graduates from other racial groups might have entered the labour market with generational wealth and additional support from their parents, Black graduates in South Africa face an additional 'tax' on their income in the form of support offered to their Black families. The financial exchange of this tax manifests itself in different ways: by sending a portion of your salary to households, taking siblings through school, or sending a portion of your salary to distant family such as cousins who are unemployed and living in poverty.

Therefore, some Black graduates experience this exchange as an inescapable obligation, while others view it as a way of restoring Black dignity through Ubuntu as a practice and ethic of communal and collective support.

[1] I have capitalized 'Black Tax' to indicate that it is not an objective phenomenon in the sense that we can talk about 'social support' or 'kinship support', but rather a specific vernacular used to name a certain practice, and which may have - as in the US context - a different meaning in other contexts,

In both of these popular ways of talking about ‘Black Tax’ (i.e., as a burden, or as Ubuntu), there is not much focus on the circumstances that necessitate this kind of support for Black families’ survival. This diminishes a focus on the effects apartheid has had on Black families, in that the economic, political, and social conditions that they live in render members of Black families unemployed and, indeed, often unemployable.

However, in saying this, I am not suggesting that the contemporary practice of Black tax is not shaped by post-apartheid entrenchments of the racialised political economy of black unemployment. Nor am I suggesting that black poverty is not as much attributable to the post-apartheid casualisation of permanent employment, or new demands and expectations arising from new forms of racialised consumption and consumerism in post-apartheid South Africa. However, I think that explaining Black tax in this context alone is not enough. While the ideological concept of “Black tax” is constantly changing to accommodate new economic, political, and social realities and opportunities, what is common however is its function that is often similar to those of labour migrants’ remittances under apartheid. Therefore, rather than black tax being a concept that emerged in post-apartheid South Africa, it is in fact, the continuation of the legacies of apartheid that shapes the context of practice of Black Tax today. This is what Sizwe Mpofu-Walsh in “The New Apartheid” calls apartheid’s afterlives, where a present-day South Africa is a distorted duplicate of its apartheid predecessor (Mpofu-Walsh: 2021).

What this suggests is that constitutional South Africa remains a colonial society in the post-apartheid state. It still haunts many of the Black South Africans as it adapts around the democratic constraints of Constitutional era. According to Mpofu-Walsh (2021), apartheid systems are developing an ability to reinvest themselves in new forms even when South Africa enters a democratic moment. Therefore, Apartheid is not incompatible with democracy, in other words, democracy is not the opposite of apartheid as it has often been said. This is evident in the persistent and continuous present of apartheid in democratic life, and in that of black tax. What this means is that apartheid still thrives even within a democratic state, and we still feel its effects and legacies through black tax.

Therefore, what this conceptual report does is analyse these discussions that are often debated and expressed and delve into them in its full depth by exploring the arguments of, into what extend is apartheid in the context of black tax holds weight in the everyday lives of Black South Africans. That is to what extent can we say we have defeated apartheid and it does not affect the lives of Black South Africans. What I therefore discuss here is the emerging concept of “Black tax” in contemporary South Africa that has similar functions of remittance under apartheid. Black tax has its roots in colonial and apartheid histories, a history of violence against Black people that does not begin with contemporary problems of government corruption and political economy even as it is exacerbated by it, but spatial and economic apartheid plays a huge factor. Therefore, to analyse the concept of black tax in relation to the condition of Black people in South Africa by looking at the contemporary problems and no reference to the systematic and institutionalised racism that defines Black life intentionally misdiagnose the colonial and apartheid that bred these problems.

Hence this project tries to investigate the historical roots of Black Tax in apartheid and colonialism, in order to understand the economic and social context of endurance and unresolved colonial and apartheid crisis in South Africa. In focusing on what I am calling the ‘historical roots’ of Black Tax, I don’t mean to say that I am tracing the histories of black practices of mutual aid and kin and social support. Instead, what I intend by looking at the ‘historical roots’ of contemporary Black Tax, is to understand better how the immiseration and impoverishment of black South Africans that shapes the contemporary need for what is called Black Tax today, is a result of the apartheid and colonial past.

Colonial and apartheid histories disrupted African family life so that it created a specific kind of kinship support, based on the male migrant worker’s remittance having to take care of the whole family in the homelands while he worked in the mines. As the Black middle class emerged after apartheid, similar kinds of obligations to family are termed ‘Black Tax’ (Mhlongo, 2019:85). This was confirmed by the Old Mutual Savings and Investment Monitor in research they conducted in 2017, which showed that more than 70 percent of employed Black South Africans who are based in urban areas are currently taking care of family members or foreseen that the next generation will have

to take care of old family members once they are employed. There is also a growing concern about other Africans also experiencing this phenomenon (Fongwa, 2019).

At the same time, of course, cross-generational familial support is not unique to Black South Africans. Theories from the Global North talk about the 'sandwich generation' in society. This refers to a group of middle-aged adults taking care of both their old parents and their own children (Henretta & Grundy, 2006). However, in the South African context, Black Tax is not restricted to taking care of old parents and biological children, but rather extends to siblings, extended families, and a variety of forms of financial and social support for unemployed family members much more akin to the remittance of a single income earner. As a result, many young Black South Africans today are expected to enhance their own social mobility while also playing a role in lessening inequalities created by apartheid (Vally, 2007:17).

My own interest in doing this project is from my personal observation that Black South African students do not always study what they like and would rather opt for something that would be completed quickly enough to land them jobs so that they can support their families. In the context of hunger in the family, they find it difficult to stay in the university and further their studies and have to seek employment. Black Tax is thus an extension of economic injustice and the uneven landscape of colonial and apartheid pasts into the present (Fisher, 2019). It also describes the portion of salary that is distributed by young Black graduates and professionals to family and extended family to support their well-being because they cannot take care of themselves as a result of the continuing cycles of inequalities in South Africa due to apartheid.

As a result, the reality of Black South Africans either being obligated to or choosing to support their less fortunate family members is far more widespread than for any other race, exceeding the usual cross- and multi-generational forms of extended family support that are common (Pendleton, Crush & Campbell, 2006). This is owing to the position of Black South Africans in the context of histories of apartheid that have produced widespread Black poverty through capitalism and its entrenched white monopoly that continues to keep the majority of the Black community inevitably trapped in inequality, poverty, and unemployment (Posel & Casale, 2006). Therefore, this research suggests that Black Tax must be contextualised in the history of

apartheid which deprived many Black South Africans of opportunities for wealth accumulation and livelihoods.

### 1.2 Problem Statement

Some research has been done on the concept of Black Tax, but for the most part, these discussions focus on whether Black Tax is considered a burden or Ubuntu (Magubane, 2017; Mangoma & Wilson-Prangley, 2019; Mathunjwa, 2017; Mhlongo, 2019; Sibiya, 2018). Ubuntu is an African belief and practice of looking after one another in Black communities. However, there is no systematic analysis of the ways in which contemporary Black Tax in South Africa in fact reveals histories of Black dispossession. As such, some interconnected aspects of colonial and apartheid histories may provide the context for the contemporary phenomenon of Black Tax in South Africa, and this is the course of enquiry I engage in. In other words, through this study, I inquire into the ways in which contemporary Black Tax may be seen to reflect the legacies of the apartheid injustices in South Africa. The goal is to use the historical literature to begin to delineate how Black South African histories in relation to colonialism and apartheid might have given rise to Black Tax, and to ask in what ways the racialised transformations of Black land, labour, remittances and kinship under both colonialism and apartheid might be viewed as the context of, and for, Black Tax. Thus, my inquiry has been guided by the following question**: In what ways is 'Black Tax' in South Africa a reflection of colonial and apartheid histories?**

It has almost been 27 years since South Africa first gained its democratic independence in 1994, but despite various strategic mechanisms to bring about change, there are factors of the 'apartheid regime' that remains in place. These have been reconfigured and reinforced in contemporary South Africa, particularly through inequalities, poverty, and unemployment in the context of black tax necessity. The argument that I am trying to make here however, is not those changes have not occurred, but rather that contemporary South Africa reflects the systems and structures that operated under apartheid in contemporary South Africa. This can be seen through the Black Tax phenomenon that, it might be suggested, shares similarities with the colonial and apartheid cheap labour migrant system of

remittances. In this dissertation, therefore, I am proposing that Black Tax today can be understood as a system that is not dissimilar to the remittance system under apartheid's cheap Black labour system. An economy of widespread Black economic deprivation that is conditioned by the apartheid racialised labour market (even if exacerbated by unemployment post-apartheid) shapes a situation in which Black South Africans rely on, often the sole, wage-earner in the household to effectively function the way labour migrants once did, i.e., providing remittances from their income to sustain kin. In this way, kinship and the wage combine in a system that comes to function in the same way remittances did in the apartheid cheap labour system.

### 1.3. Literature Review

Msibi (2020) studied Black Tax by exploring how young Black graduates in South Africa perceived the concept of Black Tax in the context of shaping their career choices. The results have shown that the views of young Black South Africans in relation to Black Tax differ depending on the household's circumstances and the dynamics of Black families. The findings also highlighted the debate on Black tax that is perceived by participants as a burden whilst others call it Ubuntu, and that, Black Tax does indeed affect the career choices of young Black graduates in South Africa. Fongwa (2019) also studied Black Tax by interrogating the public and the private good of the phenomenon, where higher learning education was considered as a public good. He contextualized the African philosophy of Ubuntu as a conceptual lens to examine the concept of Black Tax within the South African context (Fongwa, 2019).

The result shows that young Black graduates do not consider the rewards of their qualifications as an individual achievement, meaning that education in Black communities is rather seen as a social benefit. Sibiya (2018:1) argues that the reason that Black family's fuss over first-generation university graduates is not only because obtaining a degree signifies having triumphed in institutions that have historically excluded Black people, but also because it represents the hope that Black families' lives will collectively now change. A degree, therefore, means securing employment which automatically means receiving money (remittances), or what is considered as

Black Tax today, and ultimately the opportunity for Black families to escape poverty (Sibiya, 2018:1).

Hence Mangoma and Wilson-Prangley (2019:460) state that the first salary and the ones that follow for recent young Black graduates become a lifeline for the rest of the family in Black homes. This is because there is a shortage of financial resource flow in Black communities, which means that any money received stretches beyond the immediate family to support extended kin (Mangoma & Wilson-Prangley, 2018:461). Therefore, Black Tax is indeed a popular concept used to describe the post-apartheid 'Black experience', naming the pervasive dynamics of financial exchanges between and within Black families (Magubane, 2017). As a result, Mathunjwa (2017) argues that Black Tax should be viewed in relation to the inherited apartheid inequalities that have come to be redressed through the mutual support of those who had access to higher education and resources, meaning young Black graduates in South Arica. The South African Graduates Development Association (2012:3), also argues that the consequence of Black Tax on young Black graduates in South Africa is that it often places a huge responsibility to contribute financially first and foremost to their family and extended kin as a result of apartheid injustices.

Sibiya (2018:44), also studied emerging Black professionals' experiences in relation to Black Tax. The results of this project showed how Black Tax is understood by the middle class as the weight of having to look after their families by sharing their salaries, which leaves them unable to invest or save for the future. Clinton Chauke (2019:196) supports this argument but takes a different angle, arguing that the reason Black Tax becomes a burden is because the apartheid system has forced Black people to depend on others by offering their labour power in return for a wage. Therefore, in this context, Black Tax will always feel like a burden, he argues, because even when Black people are employed, they are constantly treated unfairly in that they are underpaid, exploited, and cannot afford to support their livelihoods with their immediate families, making it worse to also look after the extended kin (Chauke, 2019:198).

Magubane (2017:58) explored the meaning, conditions, and circumstances behind the phenomenon of Black Tax, by looking at the experiences of young, employed Blacks in Gauteng. She found that Black Tax is described as socio-economic assistance

offered by young Black professionals to their family and their extended families. The results also indicated that Black Tax is a result of both external (poverty, inequalities, and unemployment) and internal (families broken by divorce or death of parent) environments. As a result, Magubane argues, growing up in such a society builds a strong family relationship where people value and know the importance of kinship and Ubuntu; hence Black Tax today has come to be associated with Ubuntu (Magubane, 2017:61).

Similarly, Mangoma and Wilson-Prangley (2019:443) also examined Black Tax through the forms in which young Black professionals make this exchange of money through the support of families in the rural. Mangoma and Wilson-Prangley's main finding is that such an exchange of money is often used for households' basic needs and spent on educating siblings and cousins. Therefore, for Mathunjwa (2017:460), calling it a 'tax' gives the practice a negative connotation when, in fact, it is Ubuntu. Ubuntu is described by Magubane (2017) as an African ethos and way of living that says a person is who they are because of the help of others. Ramose (2002:50) argues that, as Black Africans, we are defined by this ethos – it is the rock upon which Black families have built their families and communities. Mhlongo (2019:83) supports this argument, as he states that supporting family or extended family is a sign of Ubuntu and one of the oldest African traditions, and therefore cannot be considered as a burden. Hence, he believes that it is wrong to define this practice as a form of a 'tax', as he views it as an extension of humanity, through which those in Black families who have an ability to help should do so.

This view is also related to the essays collected by Mhlongo in seeking to understand the complexities around Black Tax in which he incorporates young, old, urban, and rural influential Black commentators in order to get a diversity of viewpoints on this subject (Mhlongo, 2019). The debates are about how to understand and value the practice of supporting families and extended family members materially. However, the commentators differ on whether it is a burden or Ubuntu. For example, Phehello Mofokeng (2019:110) argues that the concept of Black 'Tax' is a flawed social construct that he rejects as he was raised to believe that we should take care of each other. But the problem with this view is that many authors who share the same belief as Phehello Mofokeng (2019:110) seem to forget that the reason Black people

consider taking care of each other as ‘Ubuntu’ was that, in the pre-colonial era, labour was largely cooperative within the family and the larger kin group. Each family member had a role to play in order for a family system to function properly, and each member was expected to perform their responsibilities. According to Delius (1989), therefore in pre-colonial histories, family was seen as an interactive dynamic and cooperative system.

However, in the context of post-apartheid Black Tax, it is expected that only a single young graduate has to take care of the rest of the unemployed family, similar to male mine migrant labour in the cheap labour system of apartheid. This shows a shift in what was considered as Ubuntu in pre-colonial history, a mutual obligation versus how we associate the concept of ubuntu with black tax in post-apartheid South Africa where an individual person has an obligation of taking care of the whole family, which differs to what Ubuntu practice was in pre-colonial history. Similarly, the *Huffington Post* South Africa conducted a series on ‘Black Tax’ collaborating with the Savings Institute of South Africa. According to the analysis presented by the series, ‘Black Tax’ is colloquial term describing the responsibility placed on Black professionals and wage earners to support members of extended households.

In the recommendations of this series, young Black professionals were advised not to be the ‘Family ATM’ since they must prioritise saving rather than spending their income on extended families. In a response, Molefe and Magam (2019) argued that the series failed to understand ‘Black Tax’ as a social and economic phenomenon, and that, for those who are born into poverty in poor rural or urban areas, there are limited prospects for escaping from inter-generational poverty. Hence in this context, ‘Black Tax’ reflects the high rates of poverty that overwhelmingly affect Black households. Therefore, it is unsurprising that wage earners are called upon to support a range of dependents who because of apartheid are unemployed. Magubane (2017:37), in this context, argues that Black Tax has therefore come to contribute to wealth distribution in an unequal economic world. Hence it is viewed as decolonising the system in order to liberate Black communities where one person’s salary in a household must sustain the whole family and extended family.

While the literature reviewed is valuable for framing my research, it tells us little about the ways in which contemporary Black Tax may sociologically arise from apartheid histories and colonialism. Hence this study seeks to contribute by looking at ways in which contemporary Black Tax in South Africa may be contextualised within apartheid and colonial histories, especially where the remittances of cheap labour migrancy mirror the context of Black Tax.

### 1.4. A Socio-Historical Approach to Black Tax

While the existing debates about Black Tax are interesting, and some of the empirical research on how young Black South Africans experience Black Tax is useful, I am less interested in determining whether Black Tax is experienced as a burden or a blessing or whether it is some form of a tax or Ubuntu. Rather, I am interested in a socio-historical analysis of this phenomenon. Therefore, for my study, I considered how the necessity of, and for, 'Black Tax' arises from apartheid and colonial histories. My project is not empirical, but rather conceptual. As a result, my methods include two broad thematic areas of inquiry and scholarship and in each of these thematic areas, I engage with relevant secondary literature on the historical context of apartheid's cheap migrant labour system and of Black land dispossession, cheap labour migration and of the limits on Black wealth accumulation. I interrogate the relationship between Black Tax as post-apartheid remittances, and the implications of this for Black freedom and the ongoing struggle for liberation and emancipation of Black Africans. I also reflect on the injustices that play out, in a form of Black Tax, on the marginalised as a result of apartheid histories, and propose that, in many ways, Black South Africans are far from being emancipated – that is, as long as the dehumanisation of those who were structurally and economically side-lined by systems of apartheid is still neglected. I then expand on the secondary literature in these thematic areas to provide a conceptual analysis of the historical context of contemporary Black Tax.

### 1.5. Ethical Considerations

The project is entirely conceptual, relying on published secondary sources, and therefore involves no human subjects and therefore no risk.

## Chapter 2: Colonial Histories of Land, Labour, and Wealth in South Africa

### 2.1 Introduction to Land, Labour and Wealth.

The conquest of Africa by European settlers has left a legacy that has severely impacted on the human development of African people. As Moleah states, 'European colonialism has transformed the world in accordance with a European image in a largely vicious and forceful manner' (Moleah, 1994:1). From the nature of colonial and apartheid dispossession of land, the alteration of relations between traditional institutions and the governed people, the use of law to justify racialised land taking, and numerous episodes of large-scale livestock dispossession were all part of European colonialism in Africa.

During the colonialism and apartheid, Black Africans were exposed into various forms of oppressions, that is the deliberate imposition on the living conditions of different racial groups, of which for Black communities resulted into the physical destruction (South African History Online, 2020). There was also a separation of reserved ghettos and the expropriation of land and property belonging of the indigenous people which has shaped the context in which Black Africans are today poor, landless, and unemployed. As a result of these laws used by apartheid that excluded Black Africans from participating in the social, political, economic, and cultural life of the country, they also prevented Black Africans from their full development. This was done through denying them basic human rights, including freedom of education, nationality, and movement (South African History Online, 2020). Today most Black Africans are uneducated as a result of exclusion from the colonial and apartheid histories. These exclusions and deprivation of development into Black community today has forced many Black Africans into a trap of exploitation of their labour power, in particular by submitting them into forced labour migration that took away their self-sufficiency and thus were and still subjugated to White rules (South African History Online, 2020). This continues post-apartheid, since the Europeans settlement in the Cape, and took over South Africa's land for their own personal gain, evidenced in today's mining sector and commercial farms that bred migration practice and cheap labour (South African History Online, 2020).

Therefore, to contextualise Black Tax in the history of colonialism, and, later, the apartheid regime, this chapter argues that the continuing legacies of the colonial and apartheid political economy – rather than the post-apartheid context alone – shape the context for the practice of Black Tax today. This is done by examining histories of colonial land dispossession, induction of Black South Africans into a cheap labour system with meagre wages, limitations on Black wealth and capital accumulation, and disruption of family forms and structures. It thus shows how Black African families today need familial support as a result of colonial history, which explains the condition of high rates of poverty, dependency, and inability to survive without financial and other support from kin amongst Black households.

## 2.2 Contextualising Land, Labour and Wealth in South Africa

Land, labour, and wealth are essential in the economic development of a country, and the way in which they are used influence how the country develops. In South Africa, for instance, there has been a history of power struggle where people fight over the ownership of land and the need for cheap labour, which deprived many Black South Africans of the accumulation of wealth today (Hendricks, 2001). The history of land dispossession by European settlers started in 1652 when Jan Van Riebeeck sought to establish his stay in the Cape of Good Hope shapes the context of the modern South Africa (Walsh,1910). The shaping of modern South Africa from the colonial era was to divide the country into two, the Europeans and the Natives (Walsh,1910). The native side was and still lies in the question of land which 7% was allocated to Black South Africans, and this still shapes the modern South Africa today. The effect of land dispossession still lives with Black Africans today and the post-apartheid South Africa have inherited the legacy of that colonial and apartheid history. Land dispossession was along the landless and racial lines where black people were living in what was called native reserves (Platzky & Walker, 1985). Those native reserves were largely overpopulated and the land they occupied was unproductive.

South Africa today is the reflection of that past, especially in black rural and townships today, where Black people still without the land and therefore lives in overcrowded

sharks with no service deliveries such as clean water, electricity. Poverty and unemployment in these areas are high, similar to the native reserves during apartheid. Hence Sizwe Mpofu-Walsh argues that “South Africa's story is often presented as a triumph of new over old, but while formal apartheid was abolished decades ago, stark, and distressing similarities persist” (Mpofu-Walsh, 2021). What this means is that South African economy is still built around the white exclusiveness areas, meaning that Black areas are without resources and opportunities. Many Black Africans have to be economic migrants in cities that are costly, what this then does is creating an obligation of having to maintain two households, in which find the continuation context of having to pay black tax. These are the legacies of colonial and apartheid systems that has been intentionally bought into South African democracy, evident with generational wealth differences between Blacks and White. Black people were not able to enter democracy with wealth that enabled them to live or even transfer wealth to the next generation. They did not have any financial jumpstart due to the system that was implemented in a way that robbed many of them the necessary skills and opportunities to uplift themselves. Therefore, today black households are broken, poor and socioeconomically disadvantaged and black tax have to play a role of damage control through young black professional financials contributing to a black family.

Cosmas Desmond in “*The Discarded People*” as cited in Ngcukaitobi, (2021:23) described this process of apartheid on how several Africans were discarded as unwanted people, removed from their homes and in their land that was later declared and reserved for only ‘Whites’. According to Desmond (1970), Black people were placed in homelands, which often times consisted of dry, deserted, and isolated with few resources, clean water, or medical treatment (Ngcukaitobi, 2021:24). Due to the barren soil that was available, self-sufficiency through agriculture was impossible as food could not grow on the land. and, as a result hunger escalated in the homelands. Young Black men in particular were since forced to migrate into mines and farms for employment. The need for mines and farmers labours often meant breaking up black family structures. Sometimes breadwinners were killed in acts of repression by the police, evident in Mass killings, such as in Sharpeville in 1960, Soweto in 1976, or Langa in 1985, which did not only leave hundreds of dead bodies but also highly traumatised societies where that trauma was passed from generation to generation, often distributed internally, leaving broken people, and broken black families

(Motlhabi,1984). Lord Caradon in Cosmas Desmond's "*The Discarded People*" preface, as cited in Ngcukaitobi (2021: 23-24), described the process of possession and forced removals of Black Africans as "an account of callous contempt for human suffering, the ugliness of systematic cruelty, and the self-righteousness of the oppressor" (Ngcukaitobi, 2021:23).

He argued that Black people were categorised as 'superfluous' and 'unproductive' and thus were not allowed in White cities, towns, and farming areas (Ngcukaitobi, 2021:24). It is therefore through these laws and practises of racialised dispossession of land, wage labourers, the marginalisation of Black people that entrenched the practice of black tax in Black South Africans households today. The feudal land relations system which still has not been changed since colonialism, Black South African are still without access to land. If government can give people their land back, this will ensure the long-term stability of South Africa instead of threatened instability, as apartheid was not only a system of racial categorisation but built from Black land dispossession and the exploitation of Black labour (Agüero, Carter & May 2007).

The impact of apartheid forced removals and dispossession of land continues to be felt to this day. The majority of the families whose land rights were eroded and whose livestock were taken under the colonial and apartheid system are still very much struggling, and poverty is deepening (South African History online, 2020). Unemployment has also increased drastically over the past decade, as most African citizens still live under the most difficult conditions (South African History online, 2020). Therefore, black tax cannot be simply a result of a recent set of forces, colonial apartheid histories paved a way. The policies and repressive practices of land dispossession created an environment in which the Black community continue struggling in post-apartheid South Africa and the need for black tax as a continued struggle to uplift black community.

### 2.3 Precolonial era in South Africa: Black livelihoods

Before the colonial and apartheid conquest, Black South Africans' livelihoods were based on various arrangements of family, kin, and political entities, that even while

hierarchically organised and gender-differentiated, organised forms of self-sufficiency through mutual obligation and social support (Wilson, 1972; Wolpe, 1972). This means that Black South Africans were able to provide for themselves through agricultural activities, and other forms of social support that provided them with food and that sustained their livelihoods. Beinart, Delius, & Trapido (1986), supports this and states that access to land for many Africans meant that it was used for agricultural production and produced assets that generated profit and was thus collateral to secure food security. Hence to Beinart, Delius, & Trapido (1986), by depriving Black people of their land during colonialism which they depended upon for subsistence and livelihoods, the colonial government destroyed many of Black Africans ability for self-reliance, independence, and economic development. This today created the political economy of Black immiseration that provides the context for Black Tax. In its most fundamental aspect, it severely constrained Black people's ability to feed themselves, so that today one member of a Black family relies heavily on providing their labour power to white capital to financially support their family and extended kin.

The colonial and apartheid governments, through constraints on land, labour and wealth combined, created a context of inequalities. The hardships experienced by many Black South Africans in the post-apartheid period can be associated with the legacy of apartheid with reference to 'Black Tax' as a result of failed Black wealth accumulation. Systems of apartheid can therefore not be separated from the problems of South Africa that persist in the form of poverty, unemployment, and inequalities. Black people, for a very long time, were and still are exploited, suppressed, oppressed, and humiliated as a result of institutionalised systems that ensured the prevention of Black wealth and curtailments on rights to business and wealth creation in South Africa (Terreblanche, 2012). This shaped how Black people are today impoverished, as apartheid exploitative economic practices systematically dispossessed Black South Africans.

Today Black South Africans have no generational wealth and are constantly living on hand to mouth salaries which satisfy their immediate needs and cannot make provision for the future, compared to their White counterparts who were able to build generational wealth (Mkhonto,2018). Due to the repressive and discriminatory law practices of the colonial and apartheid government, there is also still a wage gap

between Black people and Whites today, even though inter-race inequality decreased in post-apartheid South Africa (Mkhonto,2018). The wealth gap between Black and White, however, has widened. In many ways this results in the continuation of Black impoverishment as the post-apartheid government continues to maintain the superior status of those who colonised Africans (Grootboom, 2016). While Africans are seen as inferior making the need for Black Tax a reality as Black families remain at low social and economic status of South Africa, miserable and impoverished (Claassens and Cousins, 2008).

At the same time, the systems of apartheid progressively turned Black people into dependents of white capital, and this produces a racialised society that is founded on colonial and apartheid inequality (Freund, 1984). It also contributes to Black people being condemned to live in appalling conditions as they did during apartheid when given inferior education under Bantu Education, unfair labour practices in the context of a migrant economy, and economic and political exclusion rooted in the racial hostility that prevented development of Black South African livelihoods (Godsell, Chikane, & Mpofu-Walsh, 2016). Following the 1953 Bantu Education Act, the colonial government entrenched inequalities and discrimination and sought to racial segregate the education system by deliberately and explicitly implementing a system that made Black students fit only for unskilled and semi-skilled labour (Fiske & Ladd, 2004).

At the same time, educators in Black schools were often under qualified and poorly trained, which rendered the quality of education given to Black people poor. This has led to under-investment in Black human development and constrained employment and earning prospects (Webster, Buhlungu & Bezuidenhout, 2003). Today, Black Africans are compliant, exploited labourers as a result of such exclusion, and there is also a widespread need in Black families and communities for Black tax (Standing, 2014). Therefore, a true trace of the conditions and the problems that are currently affecting Black South Africa today cannot be separated from colonial and apartheid histories. Apartheid had many elements that drove Black people in the state of poverty as a result of systematic land dispossession, the displacement of persons on account of their race, and the creation of conditions akin to forced labour.

## 2.4 Post-apartheid Labour in South Africa.

According to Mpofu-Walsh (2021:105), “the decentralisation of wealth since 1994 has not meant the redistribution of economic power”. Rather the power has simply been redirected. Mpofu-Walsh (2021:105), argues that today wealth is decentralised, globalised, and financialised. What this means is that instead of the apartheid economy being controlled by the state, it has become decentralised networks that has spread throughout the South African Institutions.

Therefore, post-apartheid dispensation has seen Black Africans continue to be unfairly treated and experience inequalities that have their roots in a violent past. The challenges of inequality and economic exclusion today indicate the persistent, long history of apartheid and the discriminatory systems that has been morphed (Seekings & Natrass, 2016). Despite the mandate of democratic South Africa after 1994 to improve the livelihoods of those who were disadvantaged by advancing the economic and social rights to inclusion in society, nevertheless many Black South Africans are still marginalised economically (Simkins, 2004). The post-Apartheid, with Mpofu-Walsh's remarks on women and the workless class, created new forms of oppression" he said, "disproportionately affect certain people”, and these people being Black women, the 'Black workless class', and poor African migrants (Mpofu-Walsh,2017).

The position of Black women in the new apartheid is even more difficult, because while Black men can benefit from the relaxation of racial laws and the fruits of patriarchy, Black women still suffer under both the White supremacy and the multiple patriarchies. This comes from the nature of caring for ‘Black mutual family support’ that are sometimes cast as Ubuntu, however, are in fact a historical product of the colonial and apartheid systems disrupting and destroying forms of Black ‘family’ life (Gade, 2012). Today the world demands and expects extraordinary strength from women, particularly Black women. They are expected to be strong in the face of institutionalised racism, sexism, and inequalities — who must be extraordinary in the workplace and come home to be exceptional wives, better mothers, and caregivers of

everyone. Black women are never afforded the chance to be free, as they are expected to carry the burden of taking care of everyone on behalf of an entire gender and race even within the context of “black tax” in question. They are not allowed to be tired, nor are they given the protection that is accorded to everyone else because they are deemed to be strong and therefore able to cater for everyone. Black women therefore continue in these contexts to self-immolate and overextend themselves in the inter-generational reproduction of black poverty that is exacerbated by apartheid. This has a negative effect on mental health, and therefore, Black women must not be defined by perpetual fighting for survival as they have been fighting their entire lives. For this reason, they deserve to rest and have an obligation to rest in a world that demands they endlessly participate in one struggle after another.

### 2.5 Post-apartheid Wealth in South Africans

Terreblanche (2002), argues on the notion of post-apartheid economic freedom in South Africa that, although the income of Black households has changed since the end of apartheid, white South Africans are still paid more than Black South Africans. It is evident that the democratic dispensation has attempted to rectify the prejudice of the past, in terms of equality for all. However, there is still a long way to go when this spatial and socio-economic legacy of apartheid persists in many forms in South Africa (Mpofu-Walsh, 2021). Ratele (2015) supports this argument and stated that the median salary in a Black household is around R34 078 per year. This means that half of these families received R2 839 per month or less, which hardly provides them with necessities (Ratele, 2015).

Therefore, it becomes even more difficult for them to support their families and extended kin in the context of black tax and having to financially take care of everyone. Most Black families are not constituted as the ideal Western nuclear family consisting of a husband, wife, and kids (Posel & Casale, 2006). Black households are intergenerational; this includes immediate and extended kin who, because of apartheid histories, are not educated, do not have the necessary skills deemed for employment in the contemporary South Africa and therefore are often unemployable, relying solely on a single wage earner and social grants (Mkhonto,2018). The income in Black

households therefore supports many people compared to wage earners in other racial groups' households, who may solely be supporting their immediate family if not themselves or planning and saving for their future (Mkhonto, 2018).

The migrant labour system is also still a problem in the Black community even after apartheid as it continues to separate Black households by isolating Black people to live closer to work but very far from the family (Akanle, Fayehun, Adejare, & Orobome, 2019). Transport to the employment location is expensive, forcing many Black people to maintain two households, and this all adds to the cost of living for many Black families when compared to other racial groups. Due to apartheid systems that favoured them, other races lived and still live near business cities that are close to their workplaces and do not have to travel or maintain two households, unlike the disadvantaged Black South Africans who, because of apartheid, had to live in the countryside and had to be temporary economic migrant workers (McCulloch, 2013).

The above elements, in combination, make up the factors behind financial interdependency amongst Black families. These did not just come about through post-apartheid neo-liberalisation, globalization, casualisation of employment, or new demands and expectations arising from new forms of racialised consumption and consumerism in post-apartheid South Africa. Nor are they simply a result of Black families' forms of extended family and mutual financial and social support. Rather they were shaped by centuries of the entrenchment of a racialised political economy of Black unemployment, Black poverty and the immiseration and impoverishment of Black South African families by the imperialist and the colonialist regimes, which systematically enslaved, dispossessed, exploited, and excluded Black people (Cross, 2003).

Therefore, apartheid may be formally over, and South Africa may be a democratic country, but there are much bigger, historically constructed structural forces at play today which still constantly make the lives of those who were disadvantaged because of apartheid systems difficult (McCulloch, 2013). These forces, when combined with historical practices of familial support and obligation placed on Black households today, do feel like an inescapable cycle or a tax, especially for first-generation Black graduates newly employed and having to take care of their families and extended kin

in ways that resemble the way their forefathers did, after being forcefully removed from their land and working in mines for years while paying remittances to sustain and support their families (Crush, 2000).

This research report, however, does not have time to go into pre-colonial forms of mutual obligation and support. To some extent – as the migrant labour system, for example, reveals and diagnoses – forms of ‘Black mutual family support’ that are sometimes cast as Ubuntu are a historical product of the colonial and apartheid systems disrupting and destroying forms of Black ‘family’ life on the one hand and, on the other hand, reconstituting the idea of the Black ‘family’ in terms that make it central to the social and economic livelihoods of Black South Africans. Recent young Black graduates and professionals today, therefore, are the next generation caught in the duty of having to play the same role their forefathers and fathers did in the colonial labour migration system, which is what I discuss next: how post-apartheid South Africa reinforces the ways in which apartheid economic inequality is reproduced and maintained within the country’s social and economic forms, allowing it to perpetuate its economic and power structures.

## CHAPTER 3: Black Tax as Post-Apartheid 'Remittance'

### 3.1 Introduction of 'Black Tax' as Post-Apartheid 'Remittance'

South Africa is a democratic country; however, the majority of its citizens are experiencing exclusion from the economy and deprivation of their basic needs. As a result, many young Black South Africans are now obligated to financially support their families and extended kin (Modise & Mtshiselwa, 2013). While the migrant labour system established during apartheid was a central driver of remittances, prevailing conditions of inequality, unemployment and poverty today are the key drivers of the same cycle which, I am arguing, is akin to what we today call Black Tax. This is because the post-1994 South African government has done little to reduce this cycle. In fact, various studies have shown that after democracy was attained in South Africa, the widespread inequalities, unemployment, and poverty have tended to increase, making the need for Black Tax a reality (Mangoma & Wilson-Prangley 2019; Mathunjwa, 2017; Ndinga-Kangaanga, 2019).

To contextualise Black Tax, therefore, as a 'post-apartheid remittance', it must be remembered that the history of migration and labour in colonialism established a specific relation between kinship and financial support for Black families in the context of the racialised cheap labour system. The relations between the wage and family support have thus been, and remain, complex. Yet importantly, this reliance on, often, a single income for familial support in the context of a racialised cheap labour system was termed 'remittances. I want to suggest in this chapter, however, that there is some affinity between this practice and what today gets called Black Tax. In what is referred to as 'Black Tax', there is a similar relation between kinship and the wage for extended family support, although 'Black Tax' is not exactly like older forms of mutual support, which were heavily based on the redistribution of a wage. With Black Tax as per Van Onselen's argument on students, is that even with bursary, it comes to function, too, like 'the wage' (Van Onselen, 1997). Therefore, in this chapter, I trace the histories of labour migration, kinship, and remittances to provide an account of the historical context of a similar arrangement evidenced in 'Black Tax' today.

South African pre-colonial society had a system of social obligation and support which was organized around kinship and community ties (Beinart, 1986). However, a specific relation between kinship and the wage emerged with colonialism. The colonial and apartheid migrant labour economy was one where, by design, Black African families relied heavily on a single Black African wage having to support the whole family by sending remittances back home. The cheap labour system was founded on this, as Harold Wolpe so persuasively demonstrated in his discussion of the reproduction of cheap labour power in South Africa (Wolpe, 1972). The pre-colonial societies were based on the concept of cooperative groups of working individuals, where everyone had an obligation towards the well-being of each other (Beinart, 1987).

Ubuntu also appeared in these communities where forms of mutual aid, sharing, and obligations were crucial (Gade,2012). The settlement of the Dutch in South Africa, however, changed the way in which African societies operated and established structures of familial support, but the architecture of a single wage having to service an extended family became a distinctive feature of apartheid's cheap labour system. With the restructuring of land and livelihoods as already detailed, the Black family became dependent financially on a single income-earner (Wilson, 2011). The discovery of diamonds and gold was the beginning of the formation of this single wage earner in a mining industry created by apartheid government under the labour migration system (Rodney, 1973). With the 1913 Land Act in place, the colonial government ensured a supply of Black migrant workers by decreasing the cultivable land available for Africans, instituting various administrative controls aimed at pushing African households into wage labour (Rodney, 1973).

As a result, migrant workers, mostly male figures, were recruited across countries, particularly from rural areas to cities, and were forced into working for mines, and their everyday life involved living in overcrowded spaces and working in dangerous places. At the same time, these men were not able to move their families to their places of employment due to the apartheid system, which restricted the movement of non-whites through establishing control measures (Sharp & Spiegel, 1985). Black South African women too appeared that in order to support their families, they later had to migrate to the cities, engaging in income-producing activities under their own control at first (e.g., beer brewing, etc.) but then after the apartheid state heavily restricted

their capacities for these kinds of independent urban-based livelihoods, increasingly became incorporated as domestic workers into the racial economy of apartheid (Theron, 2014). This resulted in a system of oscillating migrancy for Black families that demanded continual financial circulation to support people left in rural areas by sending remittances.

At the same time, migrants (single male earners) upon moving to work in mines, farms, and white homes, maintained close ties with families through monthly remittances that were sent to the countryside. According to Posel and Casale (2006), there is a record of 90 percent of Black Africans under the apartheid system being labour migrants, with 85 percent of them sending remittances back home. The Household Survey in 2011 also noted that about 15 percent of people in rural societies depended solely on labour migrant remittances, and this cycle of dependency has remained in post-apartheid South Africa, where now graduates and young professionals are trapped in this sequence (Badat, 2017). African labour migration, as a racialised colonial system, in South Africa established a relationship between kinship and remittances (or family support), and 'Black Tax' today needs to be discussed in a context that recognises this history, where apartheid maintained this system of family survival through a single source of monetary resources. This is all, as already detailed, made necessary by the continuing legacies of the racialised system of land dispossession and labour control, which does not allow members of Black families and households to sustain themselves without such support.

The structure of Black Tax in South Africa therefore mirrors the relation between the wage and the remittance in the apartheid economy, arguably a configuration emerging from colonial histories. This is because colonial histories of dispossession have created the conditions for Black Tax, where, in a Black family, no one really has sufficient access to land, wealth or income to survive without relying on a better-off family member to provide for them in the form of remittances, and the form of provisioning from a single wage thus replicates and reproduces the apartheid pattern of migrant labour. Unlike apartheid, where the cheap migrant labour system depended on constructing the Black male wage-earner as the source of remittance to people left behind in the reserves, and where the Black female wage-earner came to be a major source of financial support to families through remittances, the system that is

functioning the contemporary South Africa has transformed Black graduates and young professionals into a new labour migrant. This, in many ways, reveals a shift of responsibility from the migrant labourer onto young Black graduates and professionals.

Today, young Black graduates and professionals in South Africa function economically for their families much like migrants did – that is, as sources of provisioning through their wages which are distributed for kinship support. For example, Van Onselen (1997) argues in an otherwise quite problematic way that young Black people frequently value higher education for the future returns that it will bring to their families; therefore, their rationale for pursuing higher education is intimately shaped by these systems of reciprocity centred around family. Despite the obvious and problematic way in which Van Onselen casts young Black South Africans' motivations and choices, it recognises that education often creates immediate and anticipated obligations to family (what some describe as a 'Black Tax').

Therefore, contemporary Black Tax comes to function as a remittance, a result of colonial/apartheid dispossession of Black land which created a situation where there is widespread impoverishment in Black families. Today Black families are unable to sustain themselves without the income support of a single young employed graduate. In many ways, this support by the young Black graduate or professional income-earner mirrors the migrant labour system in the sense that 'Black Tax' functions today much like migrant miners' or domestic workers' remittances during apartheid. This is a distinctive contemporary way in which young Black South Africans' incomes fill the 'gap' of Black impoverishment that is created by the combination of colonial/apartheid histories and contemporary unemployment and failure of state support.

This is confirmed by the Triple Jeopardy study, in which 47 percent of participants indicated that their parents did not fall under the middle-class category, and neither did their siblings for 44 percent, or extended families for 69 percent (Ndinga-Kangaanga, 2019). Therefore, the majority indicated that they are obligated to often send money home, to support family and extended family, as people in homelands often experienced poverty. 'Black Tax', in this context, is shaped by the family dynamics of African households which are deeply affected by apartheid policies aimed

at limiting African urbanization, which permitted a small, temporary male urban labour force residing on mines and in hostels and who, because of colonial systems, were uneducated or were provided with education that was limited in scope. At the same time, a female urban labour migrant force of predominantly domestic workers also sustained Black families in the reserves off of a single meagre income. Education policy under apartheid limited the relative social mobility of Black South Africans; millions of Black South Africans were denied the forms of social mobility enjoyed by their White counterparts. Education in colonial and apartheid era South Africa provided opportunities for White South Africans to move into skilled labour and professional careers, while limited opportunities and unskilled labour were reserved for Black South Africans (Badat,2017).

### 3.2 “Black tax” as post-apartheid Education

The growth in higher education enrolment among Black South Africans since the end of apartheid has been driven by the need for intergenerational mobility and a better quality of life. This growth occurs in a context in which opportunities for social mobility remain limited and access to higher education is one of the few pathways for young Black South African trying to escape from high rates of unemployment and dependency. As a result, education reinforced bonds of responsibility and obligation between students and their families. The pursuit of higher education is shaped both by bonds and obligations to kin, and, among many young Black South African students, desires for dignity denied to their parents. Today, Black young students reflect on the value of higher education as not much being intimately shape by desires to learn but by relationships with family and dynamics of poverty within their black households. Therefore, the salary of Black graduates, which extend beyond themselves to family members and extended kin, can never be compared to those of other racial groups whose parents had access to education and have built generational wealth, so that the post-apartheid generation can enjoy the fruit of their labour at an early stage.

This is confirmed by Ndinga-Kangaanga (2019), whose research found that 27 percent of Black young South Africans aged between 19 and 25 years are already

breadwinners while their counterparts from other racial groups are at universities building their future and financial stability (Ndinga-Kangaanga, 2019). The Black Tax that is often paid by young Black graduates and professionals is seen as an alternative form of social security in Black families. In fact, 'Black Tax' could also be seen as a perverse form of income redistribution, given its prevalence and influence.

Hence Terreblanche (2020), argue that in this context thousands of people would be worse off if it was not for the employed Black graduates taking care of their families and extended family members through paying what is considered as 'Black Tax'. At the same time, these students often anticipate financial obligations and use student loans and scholarship funding to support their families. The obligation to help families is informed by histories of care, extended households, and family migration (Quintal, 2015). Some of these young graduates barely study within the field of their interests because they are expected to get into courses leading to occupations that are deemed to be in demand or paying high salaries, or courses that are completed quickly enough to land them a job (Ratele, 2015). Linked to this are the deferred dreams of so many people who, because of apartheid and colonial histories, had to put their family well-being before their own needs.

For instance, some young graduates cannot further their studies to postgraduate level because, in the context of hunger and poverty in Black households, it becomes hard to study beyond an undergraduate entry level qualification (Sibiya, 2018). The importance of paying Black Tax, therefore, is embedded within migrant cheap labour remittances and particular colonial and apartheid histories. Black Tax in this context cannot be separated from the historical roots of racialised, apartheid South Africa, and the hindrance it placed on Black Africans in relation to development and human capital as it led to inequality for Black employment and economic development (Quintal, 2015). Today, Black students and young professionals suffer from financial pressure as a consequence of the systems of colonial and apartheid government and therefore cannot build their own wealth. Black Tax, in this context cannot be understood outside the experience of the colonial encounter, and its expression in a range of economic and social processes served as a coping mechanism for Black communities to counter the new South Africa's labour economy (Panyane, 2016).

### 3.2 Economic Transformation in Post-apartheid South Africa

When South Africa's economy moved to more capital and labour-intensive industries, such changes led to loss of unskilled employment opportunities that were available to Black Africans (South African History online, 2020). Black Africans in rural areas have been affected the most by these economic changes that have occurred post-apartheid. This is because the system that operated in apartheid ensured that Black South Africans remained unskilled by firstly denying them an opportunity for education while also limiting the types of jobs they could perform (South African History online, 2020). As they made cheap Black labour available to the mining, agricultural and to the domestic work sectors, Black people could not maintain themselves outside the White economy.

At the same time, as the Black people attained rights to fully participate in the post-apartheid South African economy, the demand for unskilled labour declined (Feinstein, 2005). Workers in the mining and agricultural sectors also experienced a decline in the workforce as a result of capital-intensive modes of production (Feinstein, 2005). In this case, therefore, democracy has failed to improve the lives of those who were discriminated by apartheid, evident in many of unskilled and uneducated Black South Africans as a result of apartheid structures. This has created and shaped a context of kinship relationships where Black families rely solely on young Black graduates and professionals through education to share a portion of their income with the family. For example, Standing, (2014), has also shown the systems of kinship and exchange which are shaped by colonialism, particularly the relationship between people and money, and that today, Black families consider education as a ladder out of poverty for the entire family and hence they do not value it as much for its ability to transmit knowledge but as for the role it could play in breaking cycles of poverty.

Thus, education is seen as a broader struggle for financial freedom that contrasted with the liberation struggle that Black parents experienced. 'Uplifting the family', 'fixing the family', or 'breaking the pain of the family' are common phrases used by many Black students today to describe the value of education (De Villiers, 2017). Young

Black South Africans view education as social security for the family and thus driven by the desires for intergenerational mobility and better opportunities. This is because, for a very long time, Black South Africans remained excluded from education that could provide them with necessary skills and remained in specific kinds of unskilled jobs. Everatt (2016) argues that a high number of adults during this period were functionally illiterate, and literacy levels were so poor that many were unemployable. There was also a severe shortage of professional, technical, and skilled expertise in the country. Even after years of apartheid, skilled people still remain in short supply (Everatt, 2016).

The results of the apartheid system therefore reinforced the Black struggle in Black families and reflect contemporary inequalities among Black people, where something like education has become a source of social security and welfare for Black South African families in that it is seen as liberating the family (Webb 2021); however, as Van Onselen rather contentiously suggests, with education and students this is often through debt, creating a structural tension that results in cyclical crisis (Van Onselen, 1997). Therefore, attaining a degree today, for many Black students, is seen – both through the bursary and the subsequent wage - as a pathway toward the ability to address poverty within their households. At the same time, the majority of Black parents worked and still work as domestic workers, truck drivers, gardeners and so on, and have supported the family through this informal or low-wage work (Global Analytics, 2003). For parents, therefore, the future lay in their children's ability to complete their education, find work, and contribute to the household's income.

These obligations led many Black students to understand the value of kinship relationships and education in instrumental terms, connected to the anticipated obligations that they had to their families after they had completed their studies (Webb, 2021). At the same time, high rates of poverty mean that these students are often faced with immediate family obligations, and they often in many times use their scholarship and bursary funding to subsidize their household's income (De Villiers, 2017). This means that students often do not wait to get employment in order to support their families. Any financial opportunities they get are immediately used to rescue family from difficulties. These immediate and anticipated obligations to family are defining aspects of colonial and apartheid histories and often reconfigure bonds

within family, strengthening the kinship ties amongst households through immediate and anticipated financial obligations (De Villiers, 2017).

While students may experience tensions between desires for social mobility and their obligations to family, higher education is frequently understood not as an individualized but as a collective endeavour (Webb, 2021). Young people's belief in education as a pathway to dignity for their families also highlights the complex meanings of kinship relationships. Neoliberal approaches often view education simply as an individual investment, in a context in which their families experience income insecurity or poverty, students see education, in part, as a mechanism for addressing poverty within their families (Global Analytics, 2003). Thus, they use education as much to develop themselves intellectually as to elaborate a collective vision of families that will one day help them take care of those who, because of apartheid histories, are not able to take care of themselves (Everatt, 2016). In this vision, Black Tax is seen as a potential solution to apartheid's impact on the family, thus Black Tax served as an imaginary through which dignified lives could be constructed. At the same time, Black tax reinforced the notion that the burden for addressing poverty lay on the shoulders of young Black graduates, and this binds Black graduates to systems that reproduce colonial and apartheid histories and places the burden of addressing poverty on them (Everatt, 2016).

Given that South Africa has high rate of unemployment at present, Terreblanche (2020), has shown that, in a context in which few Blacks are employed, new forms of distribution have emerged with a large number of people dependent on the social grants or informal earnings of other household members. Social grants have become another form of survival for many Black families. Currently, South Africa has a high number of social grant recipients; where grants are given to disadvantaged families, who have an income below a certain lower limit. Such grants are given to children, old people, and people living with disability (Ngoma, 2015). Therefore, grants, together with remittances from relatives, has been playing a huge role in the livelihoods of the struggling families in South Africa (Ratele, 2015).

In one study, for example, researchers also found, in the context of informal earnings, that a contract cleaner at a South African university used her salary to support and

subsidize relatives across the country (Grundy & Henretta, 2006). This shows a parallel with the system of labour migration, kinship and remittances that still operates today.

## 4. Chapter 4: Conclusion: Bearing the Brunt of Structural Inequality

While I make the argument that Black Tax is a phenomenon that arises from the structures, legacies, and continuities of the colonial and apartheid past, I am not suggesting that the contemporary practice of Black Tax is not shaped by post-apartheid Black unemployment. Nor am I suggesting that Black poverty is not in any way connected to the immiseration and impoverishment of Black South African families nor attributable to the post-apartheid economy of globalisation, casualisation of permanent employment, or new demands and expectations arising from new forms of racialised consumption and consumerism in post-apartheid South Africa. Rather, I think the contemporary context alone is insufficient for explaining why there is such a cycle.

This conclusion, therefore, rather raises questions of structure and agency and the broader critique of 'post-apartheid' society writ large, and its constraints and limits for Black life and dignity which have been critiqued by the student movement. What is suggested here is that the youth come to bear the structural contradictions which the rest of the report identifies as the 'burden' of Black Tax and the continued structuring of young Black South Africans' lives by apartheid. My analysis of 'Black Tax' also suggests that young Black South Africans are not free and are in fact constrained by having to bear the burden of alleviating the legacies of the past as they continue to experience challenges similar to their parents', such as endurance of racial and spatial inequalities, high rates of unemployment, and poverty.

Black Tax, therefore, in context is understood as a change in the ways of thinking about, imagining, and speaking about an old practice which this research discussed as family responsibility, which starts to be characterised as a burden in the form of a tax after the end of apartheid. The tax that is being referred to here is not often directed against those who are the beneficiaries of 'Black Tax' such as family and extended family, and who, because of apartheid histories, could not accumulate wealth and are often unemployed. Instead, the tax that is seen as a burden here is directed against the current government that is supposed to reconcile South Africans by transforming the economy in such a way that is inclusive to all and allows Black South Africans to

participate in the broader economy to redress the inequalities created by colonial and apartheid history and broaden the economic base that stimulate further economic growth and create employment (Tsheola & Makhudu, 2019).

However, despite South Africans independence and democracy, the country remains deeply separated and affected by inequalities that were laid down by colonialism and apartheid histories, these today persist in post-apartheid South Africa through social and economic arenas (Ngcukaitobi, 2021). For example, young Black South Africans are still caught up in a cycle of Black Tax (Theron, 2014). What this shows is the too familiar cycle of misfortune and poverty that cultivates a consistent feeling of despair within Black families and lives and that has to be addressed by young Black South Africans through supporting their families financially the same way their forefathers did in colonial and apartheid periods. The difference, however, is that these young Black graduates, as 'born frees' in a free democratic country, have to bear the same responsibilities. Malaika Wa Azania argues therefore that:

> In a South Africa that had already declared itself to be post-apartheid, the image of racial integration and progress put forward by the current government is torn apart by the current generation living within structures that are still ravaged by institutional disparity, the image of the "rainbow nation" is belied by the lived experienced of young Black students often exposed though voices of contemporary change for Black consciousness (Wa Azania, 2014:1).

This suggests that young Black South Africans who grew up post-1994 and into South Africa's transition of a democratic nation, are decidedly not free. Despite not being born during the times of constitutionalized apartheid, they are, however, according to this analysis, still enduring the effects of an epoch of systematic individualized apartheid. This in many ways suggests that this generation is affected by the continuity of apartheid in the present, and the struggles against it.

The post-apartheid young generation have therefore created alternatives for engaging through reconstructing the concept of being "born free" and its implications in socio-political participation in South Africa and in the context of black tax. Many of these young Black South Africans face similar if not the same struggles of their parents, such

as high rates of unemployment, poverty, and inequality (Jacobs, 2016). Although this generation is raised in an increasing number of middle-class households and in families that are richer than those of their parents, they are still struggling with economic challenges such as high degree of exclusion from the economic mainstream (Jacobs, 2016). For example, the various economic policies adopted by the current government of South Africa support, in one form or another, the interest of the capitalist, privatisation, markets, and liberalisation (Simkins, 2004). This means that it operates within the logic of markets that prioritise profit over the livelihoods of its citizens, especially those who, because of apartheid, were disadvantaged. What is being suggested here is that the subjective relationship to a particular economic experience changes over time. The histories of dispossession, land and labour, and the limits placed on the possibilities of Black wealth creation and accumulation, often produce overly economistic analyses of particular experiences.

For a very long time under colonial and apartheid history, Black people have been considered as objects that do not have agency and existence (Chinguno, 2013). The colonial and apartheid systems rendered the humanity, social problems, and realities of many Black people invisible (Chinguno, 2013). For example, in the aftermath of Marikana the continuing reality of the system of apartheid cheap labour exploitation, which sees the marginalised as not human beings and therefore not given a platform to effectively articulate their struggles and lived realities, was laid bare in striking ways (Chinguno, 2013). The post-apartheid government in the Marikana crisis operated in a way the colonial government did by reproducing the dominant discourses and ideologies which favoured the elite interest. This was confirmed by the deaths of the 34 miners occurred in ways that removed their humanity and subjectivity (Chinguno, 2013). Black people fighting exploitation and unfair treatment have been perceived pessimistic ways that ignore their subjectivities and their lived experiences as underclass workers, living an inescapable life at the margins of society, having to take care of their families through sharing a portion of their salaries as a result of apartheid structures and failed post-apartheid government (Chiumbu, 2016).

The research’s analysis also suggests that the cycle of Black Tax in South Africa has proven a continuity of unfinished transformation and confirms that Black people are still the victims of the colonial apartheid system that continues post-apartheid haunting

many Black people (Seekings & Natrass, 2016). This is confirmed by Malaika Wa Azania, who reflected on and questioned the notion of being 'born free' given to the struggle of the same generation for economic and other forms of freedom (Wa Azania, 2014). She argues that there is nothing free in this generation and the next upcoming generation as long as the cycle of exclusion, inequality, unemployment, and poverty persists. Confirmed is the notion that the post-1994 South Africa Government achieved a constitutional democracy rather than the economic liberation. Evident in the liberation right to vast votes which does not lead to freedom, nor does it solve, the problems of the past as Black people continue to suffer even in these contexts (Mpofu-Walsh,2018).

Therefore, the post-apartheid rise of young Black university students, graduates and professionals in South Africa is seen as a drastic transformation since apartheid (Wa Azania, 2014). In its emergence it is characterised as a newly expanding, vibrant, and powerful generation with better resources, access to education and platforms to voice Black struggles. Thus, the responsibility for deracialising the political economy of apartheid and the driving force of economic growth lies with this rising young generation. Many of this young generation came to view democracy as being created to unlock the economic difficulties of all South Africans; however, at the same time it has left this young generation angry and weary (Morrissey, Nkosi & Kalipa, 2015). They are angry at the government for their exclusion from mainstream economic activity and feel that by paying 'Black Tax', they are taking over what is essentially supposed to be a government responsibility.

Therefore, what this shows is the shift in responsibility to the state, that the young Black generation are tired of being responsible for poverty eradication when the post-apartheid government promised to take the responsibility. In Mhlongo's (2019) book, titled *Black Tax: burden or Ubuntu*? however, some of the young South Africans considered paying 'Black Tax' as a moral duty and a way that Black and African cultural values represent a solution to the problems of apartheid. While some of the young Black generation call Black Tax an alternative form of social security (Gasnolar, 2015). The government, they contend, has a duty to address South Africa's economic challenges from the past through affirmative action and decent education and by

creating jobs. However, the transition since the South Africans' first democratic election in 1994 remained in question.

The country is still very much unequal, and this plays out in young Black South Africans' constraints of having to bear the burden of alleviating the legacies of the past (Gasnolar, 2015). What the research analysis shows is the frustration of young Black South Africans who are not entirely 'free' as long as they are still caught in the cycle of what is considered as Black Tax and at the same time, they are also deeply indebted with loans taken to pay for their education, which also critiques the post-apartheid inequality that disrupted their lives as the so-called 'born frees'. This has also been shown in the struggle to transform the education sector which, for a very long time under apartheid South Africa, had been developed against Black people (Moyo, Jha and Yeros, 2013). South Africa's education system has been a space in which inequalities are reproduced. Under apartheid, education policy limited the relative social mobility of Black South Africans and, also, many Black South Africans lived through the brutal system of white-led racial segregation (Mkandawire, 2011).

As a result, South Africa has seen a new emerging social movement established to challenge the government in the continuing struggles of the marginalised (Jacobs, 2016). For example, the post-apartheid period has witnessed the rise of new student movements, political subjectivities and organizational forms that challenge the inherited weight of the past and present inequalities. These movements form part of what Wa Azania (2014) considers the "marginalised and deinstitutionalised Blacks". As such, these social movements grow as a result of what many consider to be the failure of post-apartheid governments to provide basic needs and a decent standard of living for the marginalised (Morrissey, Nkosi, & Kalipa, 2015).

Hence, in 2005, South Africa saw the rise of this generation of students who were willing to call out the problems that have been affecting Black people since apartheid by attempting to ensure that the system does not put them in a position of disadvantage again (Mqadi, 2015). Students from various universities in South Africa embarked on a national protest action, calling for a change, with inequality and exclusion at the heart of the student protests (Morrissey, Nkosi, & Kalipa, 2015). The protest gave birth to what is today known as the Fees Must Fall movement, triggered

by the rising fees that are unaffordable for the majority of poor Black students and Black middle-class students who did not qualify for government support grants, with black tax in mind (Morrissey, Nkosi, & Kalipa, 2015). They were also stirred by the accumulated frustration and humiliation of lasting inequality from the colonial and apartheid periods and the silence of the currently ruling political party as the policy makers (Mqadi, 2015).

Therefore, the need for 'free education' was the mandate for the Fees Must Fall movement, where students were concerned about the high fees for education, which began to be treated as a commodity as soon as it was accessible to all. At the same time, according to the South African constitution, it is a basic right that afforded to all students, regardless of their financial situations, are entitled to enjoy. Black South African students felt that the political leaders let them down and forgot them in the transition process (Quintal, 2015). The protests therefore tapped into a deep vein of youthful anger at the ruling party, the limitations of post-apartheid reforms, and the endurance of racial inequalities. Many students maintained that the socioeconomic disparities between racial groups are a continuation of apartheid, and that freedom is a myth because they are the generation that is supposed to be free but is still trapped in the structures of apartheid.

This generation also forms part of the Black consciousness, which means that they take into consideration the fact that, historically, Blacks have been put in a position of disadvantage colonial and apartheid systems for a very long time (Quintal, 2015). They have seen the 1976 generation of students fighting against exclusion in the form of language at the hands of a brutal apartheid government that also denied Black students the right to education. Institutions of higher learning today are being run and managed by Whites without a fair representation of Black lectures in both the classes and management positions (Quintal, 2015). Hence the anger that is revealed by many young Black South Africa who see higher education as the only pathway out of poverty. This belief in the redemptive power of education is due to socio-economic changes that have characterized the post-apartheid period. The student protests therefore emerged from the shortcomings in and failures of the transformation of South Africa, and as a result this young generation is frustrated with the state for its extreme

inequalities, widespread poverty and unemployment, corruption, and lack of accountability.

The post-apartheid government inherited a profoundly corrupt and inefficient state that has failed to deliver services to the poor or provide decent accessible education to the young people of South Africa (Ndlovu-Gatsheni, 2015). As a result of the kind of state inherited from the apartheid regime, the government is regarded as so inefficient, weak, and unresponsive that it simply became normal in Black communities to rely on young Black graduates and professionals for forms of financial support to help them fight against the poor living conditions of Black people (Quintal, 2015).

Universities today represent an angry generation, which is directed at the system that was created to ensure that Black people received limited freedom that will take them many years to be finally emancipated from (Government Communication and Information Systems Vuk'uzenzele, 2018). As Serino (2016), states, "This is a generation facing a grim irony, freer than their parents but lacking the means and institutions to truly capitalize on that freedom". Many find themselves restricted by what they have come to perceive as an 'incomplete transformation' that has simply entrenched the inequities of colonial and apartheid histories through the continuing cycle of Black poverty that must now be liberated by Black Tax in post-apartheid South Africa.

They are angry not only for black poverty that has come to be reduced by black tax but for the fact that nine percent of the White population owns ninety percent of all South Africans assets, which could have been spread across all racial groups to improve the living conditions of those who, because of apartheid, were disadvantaged, in such a way that young Black South Africans would not bear the burden of having to be the only generation after apartheid that continue to fight for liberation of Black families through paying Black Tax. It is also the fact that the unemployment rate among the Black population is 40.7 percent while for their White counterparts it is sitting at 8.5 percent, and at the same time, Black South Africans are still poor and trapped in the continuities of apartheid and their Whites counterpart dominate senior management positions across all business in the county (Ratele, 2015). What we need therefore in South Africa is fixing the economic structures that reproduce black poverty. We need

spatial justice so that we can self-determine, and we need a government that has the political will to change society - both in terms of how it governs but also in terms of how it pursues justice for Black people.

Therefore, what is being suggested by this research analysis in the context of structure and agency in relation to apartheid and colonial histories is the extent to which our practices are shaped by a complex inter-relation between structures and consciousness (Ratele, 2015). Suggestions that Black Tax can be understood as merely a pre-colonial ethic in practice today does not take into consideration the ways that historical structures have also created cultural worlds today in which the relations between kinship and the wage historically have also shaped the consciousness of how the family, support, and survival is imagined. The debates about, and further research on, Black Tax would therefore do well to try and understand this contemporary phenomenon as a product of both past and present.

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