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Original Research Article

Competition and Survival of Institutions in the Tertiary Education Sector of Botswana

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Abstract: Competition is a driver of innovation and creativity in any sector of the economy. However, where a public good like education is concerned, it is ideal that competition be regulated and controlled. This paper analyzes the key drivers of competition in the tertiary education sector of Botswana. The tertiary education sector of Botswana has been experiencing rapid growth over the past fifteen years due to the huge investment in education and skills development by the government. From the year 2006, the government of Botswana has been sponsoring leaners to study locally in both public and private tertiary education institutions. This has led to the establishment and growth of many private tertiary education institutions over the past decade and half. Consequently, the sector has grown to a level causing intense competition among institutions in the sector. Data was collected from reports published by BQA and HRDC as well as published journal articles. The study established that, the flexibility of regulatory policies, the growth rate of the sector, the size, scope and behavior of institutions and the homogeneity of programmes offered by institutions are the key drivers of competition in the sector. As private institutions face intense rivalry in the sector, they are forced to adopt survival strategies. The paper also examines survival strategies that tertiary education institutions are implementing in the light of intensive rivalry. The study also proposes regulatory interventions that may be instituted to control the level of competition in the tertiary education sector of Botswana.

Keywords: Botswana, tertiary education, competition drivers, private institutions, regulation, survival strategies.

INTRODUCTION

The government of Botswana adopted a policy to sponsor learners to study in local public and private institutions in the year 2006. The goal was to reduce cost of tertiary education and to build the capacity of the local tertiary education sector. There were only ten public and five private institutions registered by the Tertiary Education Council (TEC). Private institutions were mainly offering certificate level qualifications being regulated by the Botswana Training Authority (BOTA). Following the adoption of the policy to sponsor students locally in 2006, in the following year enrolment in local institutions increased from 22 257 to 31 129 (TEC report, 2008). From then, the tertiary education sector of Botswana experienced rapid growth through increased number of registered private tertiary education institutions and establishment of new public institutions. As of June 2026, there were 128 accredited Technical and Vocational Education and Training (TVET) institutions and 62 Higher Education (HE) accredited institutions giving a total of 190 accredited conventional institutions with 1285 accredited learning programmes. Considering the size of the population of Botswana, this has caused intensive rivalry among institutions in the sector. The paper presents a careful review of the drivers of completion and the strategies that institutions have adopted to survive the intense competition in the sector.

Background of Study

In 2013, the parliament of Botswana enacted the Human Resources Development Council (HRDC) Act and the Botswana Qualifications Authority (BQA) Act. According to the Education and Training Sector Strategic Plan (ETSSP, 2015), HRDC Act established the Human Resources Development Council as an organization to "provide policy advice on all matters of national human resource development, co-ordinate and promote the implementation of the National

Human Resources Development Strategy (NHRDS), prepare the national human resource development plans; and advice the government on tertiary education financing and workplace learning'. The Botswana Qualifications Authority (BQA) as an organization as well, was established by the BQA Act of 2013 to 'coordinate the education, training, and skills development quality assurance system across all levels of education in Botswana and to maintain the National Credit and Qualifications Framework (NCQF).

In 2014 the Botswana tertiary education sector began a transition which saw the rationalization of the mandates of BOTA and TEC and transformed them into BQA and HRDC respectively. This transition brought in new regulatory requirements for registration and accreditation of institutions, qualifications and learning programmes. To facilitate registration of qualifications and accreditation of institutions and learning programmes, BQA developed quality assurance instruments and guidelines. Key of these instruments and regulations were; the Quality Assurance Standard (QAS)1 which guides the registration and accreditation of conventional Education and Training Providers (ETPS) and the Quality Assurance Standard 3 (QAS3) which guides the accreditation of learning programmes. These standards provide detailed requirements to be met for each criterion outlined.

Statement of the Problem

From the year 2014 up to 2024, the tertiary education sector of Botswana has been undergoing a transition to align the NCQF with regional and international education frameworks (Jaftha; Mwewa & Branco, 2023). The transition resulted in more than 150% increase in the number of institutions registered and accredited by BQA. With this number of institutions, the tertiary education sector of Botswana has reached a state of excess capacity. Intuitions can no longer enroll sustainable numbers of students. New institutions continue to be registered whilst existing institutions expand facilities in pursuit of alignment with the national policy direction. Competition among institutions has become intense, leading to unsustainable operations which may compromise the quality of output in the sector.

Aim

The study seeks to analyze the forces driving competition in the tertiary education sector of Botswana and to assess how institutions are responding to competition.

Research Objectives

The study seeks to:

- Assess how changes in regulations has influenced competition in the tertiary education sector of Botswana over the past ten years.
- Examine industry structural factors driving competition in the tertiary education sector of Botswana.
- Evaluate survival strategies adopted by tertiary education institutions in response to the intense rivalry in sector.

Significance of Study

As that government continues to invest in skills development through funding the youth to study in both public and private tertiary education institutions in the country. It is essential that the environment in which such investment is lending be reviewed to establish any possible forces that may militate against the realization of expected return on investment. The paper reviews the current state of competition in the tertiary education sector. The findings, conclusions and recommendations of this study will provides useful information to statutory institutions responsible for regulating and funding tertiary education in the country (BQA, HRDC and DTEF) on whether they should promote or regulate competition in the sector. Further, individual institutions can be guided on the strategies to adopt in order to survive in the current competitive environment.

Theoretical Framework

The paper makes reference to Michael Porter's Five Forces Model which was first published in the Harvard business review in 1979 (Hough, Thompson, Strickland and Gamble, 2008). The model provides five competitive forces which affect operations of an industry. The forces are; competitive rivalry among firms in the industry, threat of new entrants, threat of substitute products, bargaining power of customers and bargaining power of suppliers. This study focuses mainly on the forces causing competitive rivalry in Botswana's tertiary education sector. According to Porter (1979), rivalry among firms is high where there many firms of similar size offering undifferentiated products to the market.

LITERATURE REVIEW

Competition is an essential tool which effectively organizes an industry and induces creativity and innovation as firms seek to be efficient (Bloch, Mitterle & Seidenschnur, 2024). The study of competition in higher education has always focused on research reputation, university ranking and international student's flows (Marginson, 2013). Less has been done to study the factors driving competition, how it can be regulated and controlled and the impact it has on institution behavior. The consistently declining government funding for public institutions and the rise of powerful private universities across the globe has led to commodification of higher education. This implies continued investment by private sector organizations in the higher education sector (Bushi, 2018).

Globalization is one of the key forces transforming higher education systems, policies and institutions (Marginson & Wende, 2006). The rise of a global knowledge society, collaborative programs, global student markets and international educational experiences has shifted education from being a local product to becoming global commodity. Universities and colleges are no longer competing within political boundaries of their countries because students can choose and get admission in any globally. Across the globe, countries have established regulatory frameworks for tertiary education with the main goal of ensuring quality of services provided by institutions in the sector (Lodge, 2015). There are two basic approaches to tertiary education regulation, the first being the ‘Command and Control approach’ where standards are put in place by the regulator and regulated entities are required to comply with those standards (Pritchett,2016). Accordingly, the regulator undertakes regular monitoring to ensure entities continue to comply. This approach ensures public confidence in the output of the regulated sector. However, the approach is criticized for limiting innovation by regulated entries and delaying growth of sectors due to bureaucracy. With regards to entry into the industry, a sector that follows the Command-and-Control approach has stricter entry standards which screen out entities that are likely not able to meet the initial registration requirements.

The second approach is the ‘self-regulation approach’, where minimum quality standards are set by the regulator and entities are required to set their own at par with or above the minimum required (Walters & Wiseman,2025). With regards to tertiary education, self-regulation refers to the level with which institutions are allowed to decide freely and independently how to perform their tasks (Porter& Ronit, 2006). This is done by means of self-evaluation reports which are submitted according to set intervals to the regulator for review. After reviewing, the regulator judges whether the institution’s performance meets the standards or not. The self-regulation’ approach provides more flexible entry requirements which may lead to flooding of the sector with entities of different sizes. According to Molotsi (2009) the approach to tertiary education regulation depends on the level of development of the sector in a country since the goal is to strike a balance between promotion of access and equity and ensuring quality of services are offered. Proponents of industry regulation argue that poorly designed regulations can impose significant costs on firms in an industry and hinder investment flows in the industry (Bünger, 2017). The challenge of policy makers is to design regulations that can foster health competition in an industry. Regulation must be essentially tight to screen out undeserving players (Tanwar, 2013). According to the Organization for Economic Co-operation and Development report of (2024), regulatory reforms can significantly affect the nature of competition in a sector. The report further notes that regulatory reforms have major deregulatory impact which often open the field for competition.

Every industry goes through a lifecycle with four stages which are introduction, growth, maturity and decline (Leonid & Niron,2017). The duration of each stage depends on the nature of the products or services produced and markets served. As many firms enter industry, the capacity expands if there is market available for new firms to serve. If the market is small and has no potential for growth, new entrants only increase the intensity rivalry among firms in the industry (Porter, 1980). One firm can only increase its market share at the expense of the other’s market share. Porter,(1980) suggest that market size is one key determinant of the level of rivalry among firms in a sector. Where there are many firms and limited number of customers, competition is high as firms compete against each other to get attention of a few customers. Also, an industry with competitors of almost equal size, offering undifferentiated products or services, rivalry among firms is intense. As of June 2026, the higher education sector of Botswana had twenty-one public and forty-one private higher education institutions, this resembled excess capacity for a sector that receives approximately fifteen thousand successful applicants from the secondary school systems every year. It therefore leaves institutions to intensely complete against each other for these few applicants. According to Anand, (2012) low barriers to new entrants in an industry determine the intensity of competitive rivalry.

Even when competition intensifies, firms may not immediately exit the market due to market exit barriers. Barriers to market exit are the economic, strategic and emotional forces that keep the forms operating in the industry although they are no longer making profits (Holzl,2005). Although barriers to exit vary from one industry to the other, the common barriers include fixed assets invested by firms, strategic partnerships with other firms locally and globally, labour agreements which cannot be stopped easily as well as the nature of products or services offered. Faced with intense competition and barriers to exit, firms adopt survival strategies to continue operating. According to Velu (2015), collaboration and strategic partnerships with other firms within and across industrious is one ingredient for survival in highly competitive industries. Collaboration is an important means by which firms gain access to the capabilities needed to compete in changing markets. Shiferaw, (2009) opines that research and development is one of the strategies that puts an organization in a competitive position for survival if the industry is not highly innovative. Stocker, (2019) suggest that firms adopt continuous innovation and investment to boost their scale of operation given that large firms have better chances of surviving intense competition than small firms.

METHODOLOGY

The study was based on secondary data collected from the websites of BQA, HRDC and institutional websites as well as published articles on the tertiary educations sector of Botswana. A close comparison was made between the legacy regulations which were used by TEC to register and accredit higher education institutions in Botswana and the current BQA standards to determine the extent to which these standards have limited or influenced competition in the sector. The focus was to answer the question, why has there been a rapid increase in the number of institutions in the sector under the current regulatory framework than it was under the legacy system? Published BQA and HRDC reports for the past ten years were reviewed to establish the sector growth trends. Websites of some selected institutions were reviewed to establish number of campuses and accredited programmes. The study established the number of learning programmes, fields of learning and NCQf levels which form the basis upon which institutions compete against each other.

Findings

(i)Regulatory Changes Influencing Competition in the Tertiary Education Sector of Botswana

The current intense competition in the tertiary education sector of Botswana can be attributed the absence of entry barriers in form of strict regulatory requirements**.** Compared with the legacy regulations, the current BQA quality assurance standards for registration and accreditation of tertiary Education and Training Providers (ETPs) seems to be more flexible and easier. In the legacy system, an institution which intended to offer qualifications at Diploma level and above was to be registered by TEC and institutions which offered certificate programmes were registered by BOTA. This categorization was essential to align the level of institutional resourcing and capacity with the levels of qualifications offered (Tau & Modesto,2010). Statutory Regulation 56 of 2004 under the Tertiary Education Act Cap 57:04 provided the requirements and criteria for issuance of a letter of interim registration to an institution by TEC. That instrument had more stringent requirements than the current Quality Assurance Standard 1(QAS1) of BQA. Though the TEC instruments had 15 standard criteria to be completed, it strictly required an institution to provide a comprehensive feasibility study and to demonstrate stakeholder support before it is registered on (Criterion 4). In the BQA QAS1 these requirements are contained in Criterion 3 (Vision, Mission &Strategic Planning) and Criterion 6 (Scope of Accreditation) however, these two do not provide strict requirements for applying institutions to demonstrate feasibility analysis and stakeholder support.

Further, the TEC regulations provided for controlled institutional growth rate of not more than 15% per annum to ensure quality is maintained (Statutory Regulation 56, 2004). This meant that, the number of learning programmes offered, the number of satellite branches to be opened and the scope of programmes to be offered by an institution were controlled and maintained at a rate considered reasonable by TEC. In contrary, QAS1 does not have such controls, thus leaving institutions to rapidly expand at uncontrolled pace in pursuit of potential learning fields where government will prioritize sponsorship. The TEC regulations further required acquisition of own land for the institution to build its own facility within the 5-year tenure of the letter of interim registration (Criterion 6 (f), Statutory Regulation 56: 2004). The current BQA QAS1 does not stipulate time within which institutions should develop their own facilities, and this has allowed intuitions to continue operating on rented premises for more than ten years. This leaves learners to face the risks of being transferred from one location to the other. BQA has however provided relocation procedures to guide institutions which move from one location to the other (BQA Website,2026).

The number of institutions which were registered and accredited over the past ten years is a clear demonstration of the flexibility of the current BQA standards. As of 2016, there were twenty-one public higher education institutions and sixteen private higher education institutions (HDRC report, 2017). As of June 2026, there were still twenty-one registered public higher education institutions, yet private higher education institutions had increased by over 156% to a total of forty-one (BQA Website April 2026). The rapid expansion of the sector over the past ten years can be attributed to the adoption of highly flexible regulations which has allowed proliferation of private institutions in the sector. BQA undertakes accreditation of institutions, learning programmes, assessors and moderators to assure quality of educational services offered in the sector. The process of registration and accreditation of institutions and learning programmes is rigorous and intensive, involving document review by experts, site visits, interviewing of students, staff and management by officials from BQA. However, the continuous increase in the number of private ETPs in both the TVET and Higher Education categories over the past ten years is a clear testimony that the current regulations are more flexible that the legacy regulations.

ii. Industry Structural Factors Driving Competition in the Tertiary Education Sector of Botswana

According to Porter (2007), the key structural factors which drive competition in an industry are; the rate of industry growth, the rate of technology uptake by firms and the levels of government involvement in the industry. There has been a significant growth of the tertiary education sector of Botswana over the past ten years, this growth is reflected by the number of institutions registered and accredited as noted above. As well the number of accredited learning programmes and the number of students enrolled have significantly increased. The sector has also experienced an increase in student enrolment over the past ten years although it fluctuated year after year. According to the Tertiary Education Statistics Report for 2022/23 academic year, there were 60215 students enrolled compared to 56 447 in 2016 this is considerable 6.67% increase in enrollment. As well, the gross enrolment ratio increased from 19% in 2016 to 22% in 2023. These are clear indicators of growth of the tertiary education sector of Botswana. Giandrea, (2006) industry growth and competitive structure are influenced by birth and death of business establishments in an industry. Industry growth evolves over time as established firms expand their market share, new firms enter while those failing exit the industry (Porter, 1989). The statistics above reflect structural changes in the Botswana tertiary education sector. The growth of the sector could be attributed mainly to birth of new institutions in the sector and less or none exit of firms from the sector (Porter, 2007). Whilst there has been continuous birth of institutions in the sector, the market size in terms of customer base has not been increasing. According to the Botswana Examination Council (BEC) reports, the pass rates for Botswana Certificate Secondary Education (BGCSE) has been fluctuating below 30% over the past years giving an output of approximately fifteen thousand applicants eligible for admission into tertiary education.

Technology uptake been a key driver of growth in the tertiary education sector of Botswana over the past ten years. Around 2017, BQA adopted a Customer Relationship Management (CRM) system for online submission and processing of applications to enhance its operations and deal with increasing submissions. The new system streamlined the application processes for accreditation of institutions, learning programmes, assessors and moderators (BQA Report, 2018). On the other side the Department of Tertiary Education Financing (DTEF) introduced online loan and grant application system for new students who apply for sponsorship. The DTEF Learner Management System (LMS) also provided an interface with institutions to facilitate the availing of data for all enrolled learners in institutions for each academic period. Institutions as well developed Learning Management Systems (LMS) like Moodle, Blackboard and Astria to enable technology driven delivery of educational services. These systems helped institutions to continue with academic delivery during the Covid -19 Pandemic. According Tladi, & Aiyuk (2022), the Covid -19 pandemic forced tertiary education institutions in Botswana to take an Online and Distance Learning pedagogical approach by adopting the use of various educational technologies to facilitate online teaching and learning.

Over the period, the government of Botswana has remained a key player in the tertiary education sector both as a customer through DTEF and as a regulator through BQA and HRDC. DTEF is responsible for funding students with grants and loans which it pays directly to institutions for enrolled learners. It also pays living allowances to all sponsored students directly to their personal accounts very month. Whilst government involvement in many industries is seen as a hindrance to growth, in this case the government of Botswana is a reliable customer in the sector, it is the main sponsor of students who study in tertiary education institutions (Moremi, 2018). The growth of the sector can be attributed to the provision of a significant portion of the fiscal budget for tertiary education financing every year. Competition between public and private tertiary institutions is direct because of the open market funding model adopted by DTEF. Institutions and their learning programmes are availed in the DTEF system where eligible applicant's login and choose the institution to apply to. Once the sponsorship season opens, institutions embark on aggressive marketing, and promotion drives to attract students. DTEF is the major sponsor of students to tertiary education institutions; it is the one that determines the numbers of students and fields of programmes to be sponsored each year. All public and private institutions openly compete for students sponsored by DTEF each year. This leaves DTEF as a customer to be served by many institutions as its suppliers. Where a market has one major buyer from many suppliers, competition is bound to be intense among those suppliers (Porter, 1989).

There are three large public conventional institutions and one public open university, three private universities and several colleges. The number of competitors is a key determinant of the levels of completion in the industry. Further, where there are firms of similar size offering homogeneous products or services, rivalry in the industry will be intense (Porter, 2008). Majority of the institutions are colleges of similar size offering up to NCQF Level 7 Degree programmes for which they target to enroll government sponsored students. in an industry directly correlates with the intensity of rivalry.

iii. Survival Strategies Adopted by Tertiary Education Institutions Considering the Intense Competition in the Tertiary Education Sector of Botswana

According to Guntuka, (2022) firms adopt competitive actions in order to cope with intense compassion. A competitive action can be any observable behavior by a firm, such as a product introduction, price cut, advertising, or increased production, which can create profits for the focal firm by providing a competitive edge over its rivals (Jacobson, 1992). To keep up with the pressing competitive environment, institutions adopted the strategy of continuously developing and accrediting learning programmes in the different fields of learning. Further, institutions expanded their scope of accreditation to diversify portfolios of learning programmes that they offered. As of April 2026, there were approximately 1185 learning programmes accredited by BQA and registered on the NCQF (BQA Website, April 2026). It is worth noting that majority of the accredited learning programmes offered by both private and public institutions were at NCQF Level 6 and Level 7 (Diploma and Bachelor's Degree Level respectively) because these are the main levels for which secondary school leavers are sponsored by the government to study through DTEF.

Institutions are diversifying their service portfolio through expanding their scope of accreditation in pursuit of aligning their offerings with the government priorities. According to HRDC, (2018) private tertiary education institutions in Botswana have been concentrating on social sciences, business, and commerce learning fields because these fields not capital intensive. However, over the recent years, private institutions have begun to expand into learning fields like engineering, nursing and construction to survive the competition. According to Lee, (2019) an institution with diverse learning programmes can benefit from the superiority of obtaining information from multiple programme disciplines as well as efficient use of resources and sharing of knowledge across different units.

Institutions of higher learning are using strategic partnerships and collaborations to boost their images. According to the European Association for International Education -EAIE (2014), Universities from developed economies like UK, USA, and Australia are expanding their offerings into the global market through franchise agreements with institutions in other parts of the world. The HRDC, report (2019) notes that, several UK universities like Teesside University, University of Greenwich, University of Derby, and Leeds Beckett University were present in Botswana through collaborating with local institutions. This dual branding of educational services by foreign and local institutions improves reputation and capacity to attract students for enrolment.

Recommendations

Education is a public good, its provision is for the benefit of the receivers and the entire society. Wherever public good is provided, the government has the responsibility to ensure that the quality meets the standard that benefits society. The fact that the government has accepted to sponsor learners to study in both public and private institutions means there is need for tight monitoring and evaluation of the activities of both private institutions. The continuous increase in number of accredited institutions in the sector also means a continuous reduction in the number of students each institution can enroll in every academic year. Some institutions are likely to operate below breakeven point which may lead to compromise of academic standards in pursuit of survival. It is a fact that private tertiary education institutions are business entities whose main goal is to make profit and create shareholder wealth through providing education and training services. When business survival is threatened by increasing competition, there is no guarantee that academic standards are prioritized over business survival. From another perspective, the existence of competition in the tertiary education sector of Botswana is giving the government bargaining power to dictate the terms under which institutions must provide their services. However, the government should not enjoy this bargaining power at the expense of its regulatory and public interest role. BQA as the statutory regulatory body which oversees the sector must tighten the regulations for registration and accreditation of new institutions. The requirements for land, buildings and equipment needed must be strengthened to limit the establishment of institutions on rented facilities. In May 2026, BQA uploaded on its website the Higher Education Norms and Standards guideline for categorization of institutions. As it is now, all institutions are clustered as ETPs where all of them can claim to offer qualifications of higher levels despite their capacity and resources. If the Higher Education Norms and Standards are effectively implemented, it will go a long way to improve the delivery of tertiary education services in the country.

Conclusion

Governments across the world has opened up for participation of private sector in the delivery of education at all levels. This de- regularization has opened up for participation of private sector organizations. As private sector firms establish, competition breeds. The paper sought to determine the key drivers of competition in the tertiary education sector of Botswana. Competition in the tertiary education sector of Batswana is driven by the increased number of registered and accredited institutions over the past ten years. Although the standards used by BQA are detailed and comprehensive, they see to be more flexible than the legacy TEC regulations. The sector experienced growth in terms of number of participating institutions. Private sector organizations are attracted by the existence of the government as customer in the sector. Further, the number of learning programmes and students enrolled. Competition in the sector has been further driven by the lack of categorization of the educational institutions in the sector, as well as the homogeneity of learning programmes offered by both public and private institutions. Having established the key drivers of competition and the response strategies being adopted by institutions in the tertiary education sector of Botswana through this study. Further study is recommended on the impact of competition on the quality of educational services offered by institutions.

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