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## Moving towards redistributive and transformative social security? Gendered social and economic outcomes in South Africa

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Working Paper 2017-11

# **Moving towards Redistributive and Transformative Social Security?**

*Gendered Social and Economic Outcomes in South Africa*

*Sophie Plagerson, Tessa Hochfeld and Lauren Stuart*

prepared for the UNRISD project  
New Directions in Social Policy:  
Alternatives from and for the Global South

December 2017





# UNRISD

United Nations Research Institute for Social Development

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The project examines the emergence, nature and effectiveness of recent developments in social policy in emerging economies and developing countries. The purpose is to understand whether these are fundamentally new approaches to social policy or welfare systems which could offer alternative solutions to the critical development challenges facing low- and middle-income countries in the 21st century. This research aims to shed light on the policy options and choices of emerging/developing countries; how economic, social, political and institutional arrangements can be designed to achieve better social outcomes given the challenges of the contemporary development context; how the values and norms of human rights, equity, sustainability and social justice can be operationalized through “new” social policies; and how experiences, knowledge and learning about innovative approaches can be shared among countries in the South. For further information on the project visit [www.unrisd.org/ndsp](http://www.unrisd.org/ndsp).

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## Abstract

This paper explores whether South Africa's social security policies offer consistent, synergistic and long-term positive impacts on poverty and gender, by interrogating the redistributive and transformative outcomes of three different kinds of social security instruments. The instruments examined are the Child Support Grant as an example of social assistance, the Unemployment Insurance Fund as an example of social insurance, and the Expanded Public Works Programme's Social Sector as an example of public works. The programmes have some similarities in that they are all based on trying to address poverty in pro-poor, redistributive ways that pay attention to the inequities of the past. Designs are very different, but all evidence innovative thinking and attempts to engage with gender inequality. Overall, the CSG does much better than the other instruments in relation to redistribution and transformative gender effects. However, the effects across the social security spectrum are disappointing, with limited achievements in the UIF and EPWP especially, although gendered redistribution is taking place in all cases. Social transformation is lagging behind, and the problems can be largely laid at the door of implementation inefficiencies and unresponsive institutions.

## Acronyms

BCEA	Basic Conditions of Employment Act
COIDA	Compensation for Injuries and Diseases Act
CSG	Child Support Grant
DBE	Department of Basic Education
DPW	Department of Public Works
DSD	Department of Social Development
ECD	Early Childhood Development
EPWP	Expanded Public Works Programme
FTE	Full-time equivalent
HCBC	Home Community-Based Care
NGO	Non-governmental organization
SASSA	South African Social Security Agency
SDG	Sustainable Development Goals
TCC	Thuthuzela Care Centres
UIA	Unemployment Insurance Act
UIF	Unemployment Insurance Fund
UNRISD	United Nations Research Institute for Social Development
ZAR	South African Rand





# 1. Introduction

This paper contributes to the South African case study in the UNRISD research project *New Directions in Social Policy: Alternatives from and for the Global South*, through an analysis of gendered outcomes of social security. Several social security instruments are considered, with a view to determining the extent to which the social and economic outcomes of these are transformative and redistributive with regard to gender. Redistributive outcomes are those which reduce income and opportunity inequality within a population and between groups. Transformative outcomes are those which “can contribute to realizing human rights and crafting new patterns of resource allocation, production and consumption that are conducive to meeting multiple human needs on a sustainable basis, empowering those in need both economically and politically, and rebalancing power asymmetries in society” (UNRISD 2016:61). The gendered dimensions of social welfare theories and policies are often invisible, but are critical to a more equitable and effective welfare agenda (Patel 2016; Sabates-Wheeler and Kabeer 2003).

South Africa’s social security policies legislate for various kinds of intervention strategies to protect the population from the worst vagaries of poverty and inequality. They are all considered part of the overall developmental model of social welfare that South Africa espouses. States, however, are far less cohesive and homogenous than they like to acknowledge, and it is therefore worth asking whether the different kinds of social security policies offer consistent, synergistic and long-term positive impacts on poverty and gender.

This paper considers the gendered impacts of three different kinds of social security instruments as examples of the range of state social interventions. First, the social security landscape is dominated by social assistance: cash transfers go to about 17 million individuals monthly, and the most extensive cash transfer is the Child Support Grant. The vast majority (98 percent) of caregiver recipients are women, making this *de facto* a grant targeted at women (SASSA 2014). The extensive scope and the widely lauded success of this instrument makes it an important one to consider (Patel and Hochfeld 2011; Neves et al. 2009).

The second instrument is the Unemployment Insurance Fund (UIF), an example of social insurance. The UIF is a gender-neutral instrument, for which access is determined according to employment status rather than gender. Women, however, are underrepresented as beneficiaries of the UIF. Nevertheless, some characteristics of the programme are interesting from a gender perspective, namely the inclusion of domestic workers, who are predominantly female, in an insurance programme that is mainly limited to the formal employment sector, and therefore inaccessible to large segments of the unemployed and informally employed. The UIF’s maternity provisions also represent an intersection of provision for women in both their productive and reproductive roles.

Finally, the Social Sector division of the Expanded Public Works Programme (EPWP-SS) is the third instrument. The large-scale Expanded Public Works Programme (EPWP), launched in 2004, aims to reduce poverty and create work opportunities through labour intensive projects. Rolled out in phases, the EPWP has created 6.5 million work opportunities since 2004. It is divided into four broad sectors—infrastructure, environment and culture, social sector and community works. We are particularly interested in the social sector, a new and growing field in which the EPWP works, because, as the work is of a traditional caring variety, the targeted population are

largely women. Public works are a relatively large and wide-reaching policy instrument. While public works fits less neatly into a social security definition than social assistance and social insurance, its social protection function for workers has often been questioned partly because of the limited scale of the work offered, the limitations in skills development for participants, and the short duration of the employment period for each worker (Antonopoulos 2009; McCord 2009).

Social justice and gender-sensitive approaches to social protection frame the analysis of redistribution and transformation, in exploring whether the different kinds of social security policies offer consistent, synergistic and long-term positive impacts on poverty and gender. This is explored by answering the following questions:

1. What are the gendered social and economic impacts of different social assistance and social insurance policies in South Africa, namely, the Child Support Grant, the Unemployment Insurance Fund and the Expanded Public Works Programme?
2. Can these instruments both support women's care role within the private sphere and promote women's social and economic inclusion (without compromising either aim)?
3. In what ways can the gendered social and economic outcomes be considered as contributing to redistributive and transformative social policy?

The paper is structured as follows: in the next section, we outline the theoretical framework and our approach to the analysis. In section 3, we provide an overview of gender and social security in South Africa. Sections 4, 5 and 6 include the analyses of the three case studies respectively. Section 7 concludes with a comparative reflection on their contribution to redistribution and transformation for men and women.

## 2. Theoretical Framework

### ***2.1 A social justice and gender-sensitive framework***

Social justice and gender-sensitivity shape the framework used in this paper for thinking about social security, and help to define what is meant by economically redistributive and socially transformative impacts of social security instruments. The aim of the evaluation is to use a gender lens to identify positive and negative, primary and secondary, direct and indirect, short and long-term gender effects on beneficiaries that result from the social security interventions (Stern et al. 2012). We first explain our understanding of a social justice approach.

A **social justice** perspective underpins the analysis. Nancy Fraser's approach to social justice can be usefully applied to the study of social security. She argues that both distributive justice (in terms of a more equitable distribution of resources) and recognition justice (personal and social dignity) need to be present for justice to be fully realized (Fraser 1995). This view builds the understanding of poverty as not only having material but also relational dimensions (Devereux and McGregor 2014). By acknowledging the intrinsic value of redistribution and recognition, a social justice approach does not simply accommodate trade-offs between social and economic outcomes but affirms that social justice is achieved in social protection when "welfare beneficiaries do not have to choose between their sense of dignity and their need for material assistance" (Hochfeld and Plagerson 2011:53). We extend these principles further, with our view that both economically redistributive and socially transformative outcomes need to be evaluated, while recognizing that these are intricately intertwined.

The social justice perspective is aligned with a rights-based approach to social protection and frames the way that social security beneficiaries are conceived. This is relevant in South Africa where the right to access to social security is enshrined within national legislation. A social justice approach views beneficiaries as citizens with a voice, and as active participants in development processes (Koehler 2011). While gender-sensitivity would be inherent in a social justice perspective, we specifically use a gender-sensitive analysis in this paper to engage with the gendered effects of the different social protection instruments. This is what is discussed next.

A **gender-sensitive** analysis seeks to counter the past neglect of gender in mainstream social welfare models (Holmes and Jones 2013). Social security has traditionally had strong links with male-dominated formal labour markets (Thakur et al. 2009). However, gender equality and women's empowerment are increasingly being acknowledged as being central to social protection aims (Patel 2012). The UN's Sustainable Development Goals (SDGs) of 2015 explicitly promote social protection as a vehicle for achieving improved gender equality outcomes (UN 2015). Social security measures interact with gender-specific vulnerabilities and risks exacerbated by gender inequalities in several ways: more women than men experience poverty; women represent a growing proportion of the labour force yet on average receive lower wages in more insecure environments; women bear the greatest personal cost of care and carry a disproportionate share of the responsibilities in the domestic sphere, and women live longer than men but are less likely to have a pension (Thakur et al. 2009). Conversely, there is the potential for women and children to benefit disproportionately from access to social security, with positive impacts on investments in their education and health, risk management and asset accumulation, livelihood options, improved intra-household resource allocation and access to credit and saving (Thakur et al. 2009). A gender perspective includes an analysis of how women use resources to bring about changes in their own lives and in the lives of their children and households (Patel and Hochfeld 2011).

The notion of care (whether paid or unpaid) is crucial to a gender-sensitive framework for the analysis of economic and social outcomes of social security. Care work refers to physical care (such as house work, cleaning, feeding, bathing a child or a sick or older person), as well as the provision of emotional care and social support. Strong views are held in society about the appropriateness of gender divisions in care, and women tend to bear the greatest care burdens (Razavi and Staab 2012). The distribution of care responsibilities across the 'care diamond' of institutions including the family/household, markets, the public sector and the not-for profit sector (both voluntary and community provision) is central to social well-being and to patterns of employment and economic development (Razavi 2007).

In order for social protection strategies to address the gendered nature of poverty and vulnerability, they need to be both sensitive to, and responsive to gender inequalities in care and domestic responsibilities (Patel 2012). The Sustainable Development Goals includes the call to 'Recognize and value unpaid care and domestic work through the provision of public services, infrastructure and social protection policies and the promotion' as a means to "Achieve gender equality and empower all women and girls" (SDG 5) (UN 2015). The UNRISD report on 'Policy Innovations for transformative change' recognizes that social protection policies have the potential to recognize and redistribute care (UNRISD 2016). A gender-sensitive framework examines how the design and implementation of social security programmes either reinforce women's and

men’s traditional roles and responsibilities and exacerbate existing inequalities, or harness the potential for social protection to contribute to a transformation of gender relations in economic and social spheres<sup>1</sup>.

## **2.2 Redistributive and transformative outcomes**

The social justice and gender-sensitive framework described above for thinking about social protection, allows for evaluations that recognize both economic as well as a wide range of social impacts in relation to gender and care. As this project focuses on South Africa as a case study, the social context for our analysis is one of chronic poverty and serious social, economic and gender inequality. A narrow notion of income protection, or only provision, is not adequate to make substantive social and economic changes. It is in this light that we use the ideas of redistributive and transformative social protection to assess specific South African social protection policies as a way of identifying new directions in social policy. We ask whether social protection instruments can offer income protection as well as tackle oppressive social relations and forms of economic, social and institutional exclusion. This requires an understanding that social protection evaluations should not just be “before and after” snapshots in relation to people’s physical and economic well-being, but should also assess how relationships, processes and social interaction has shifted since programme implementation as a way of providing evidence for success or failure (Devereux et al. 2013).

We recognize that the transformative perspective in many ways assimilates the redistributive angle. Indeed, the transformative approach to social protection, or social policy more broadly (UNRISD 2006), described and developed by several academics and social protection advocates, has reframed social protection as a vehicle for both social and economic transformation and has strongly supported the concept that social protection can be a tool to tackle gender inequality<sup>2</sup>. The view has served to broaden the primary objective of social protection interventions beyond the short-term protection of minimum subsistence levels in low-income households, and envisages a system which tackles the root causes of poverty and inequality in the long term, to achieve socially equitable outcomes (Devereux et al. 2011b). Sabates-Wheeler and Devereux (2008:25) have operationalized this idea by distinguishing between four different categories of instruments, the first three largely economic and the last more social:

*provision measures*, which provide relief from deprivation; *preventive measures*, which attempt to prevent deprivation; *promotive measures*, which aim to enhance incomes and capabilities; and *transformative measures*, which seek to address concerns of social justice and exclusion.

For practical purposes, and to avoid losing sight of both pillars of social justice, we have grouped these into economically redistributive impacts and socially transformative impacts, while recognizing the close connections between these two aspects.

We consider redistributive impacts as largely focused on the economic and income outcomes that remain the core of social protection instruments (Piachaud 2013). We are interested in findings that relate to collective effects on poverty, inequality and access to employment, and how these outcomes are differentiated by gender. We also report on available literature regarding how social security interventions are received at the individual level, as an intervention to address the need for material resources.

<sup>1</sup> Holmes and Jones 2010; Luttrell and Moser 2004; Thakur et al. 2009

<sup>2</sup> Adesina 2011; Molyneux et al. 2016; Sabates-Wheeler and Devereux 2008

In contrast, under social transformation we consider what social changes have been effected via these instruments, including impacts on gender relations and gender inequality. To assess the socially transformative impact of social security instruments, we seek to determine whether these can go beyond palliative measures that smooth over the effects of poverty and act as catalysts for positive change enabling people to move out of poverty and overcome disabling/oppressive social relations, at individual, household and societal levels (Molyneux et al. 2016).

Although, as we will indicate throughout this paper, there are many instances where there is a lack of robust evidence to conclusively measure impact, we draw on available research to tentatively comment on the current directions of social policy, on these dimensions:

1. Redistribution (with particular reference to gender):
  - a. Access to social security
  - b. Poverty reduction at individual, household and national levels
  - c. Access to labour markets
  - d. Linkages to other redistributive interventions
2. Transformation (with particular reference to gender):
  - a. Recognition of women
  - b. Recognition of care
  - c. Gender relations
  - d. Integrated support for productive and reproductive roles

## **2.3 Methods and structure of analysis**

In order to compare the different ways in which attention to gender has evolved in different sectors of social security policy developments, we focus our analysis on three case studies with varying policy outcomes: 1) the Child Support Grant, 2) the Unemployment Insurance Fund and 3) the Expanded Public Works Programme (in the Social Sector). In analysing these three cases, we use secondary data, such as government policy documents, historical narratives of policy development and academic research, as well as personal expertise of the research team. For each of these we provide an overview of the programme and explore their redistributive and transformative dimensions in relation to gender. We conclude with a comparative discussion across the three case studies.

## **3. Social Security and Gender in South Africa**

### **3.1 Social security overview**

The South African Constitution of 1996<sup>3</sup> promotes and protects social and economic rights. It legislates for the right to social security, to be progressively realized by the state, subject to the availability of resources:

Everyone has the right to have access to...social security, including, if they are unable to support themselves and their dependents, appropriate social assistance (Section 27(1) (c)).

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<sup>3</sup> Constitution of the Republic of Africa. No. 108 of 1996.

The state must take reasonable legislative and other measures, within its available resources, to achieve the progressive realization of each of these rights (Section 27(2)(c)).

Social security provisions in South Africa have transformed the previously discretionary and discriminatory social policy framework of the apartheid regime. Globally, South African legislation has been documented as an important foundation for the attainment of social justice for disadvantaged individuals and groups (European University Institute 2010). The White Paper for Social Welfare (1997) clearly identified the social security system as a mechanism for poverty and active redistribution. It established a vision for social security provision in South Africa, based on the principles of social justice, the interdependence of social and economic development, democracy and participation, and a pluralistic involvement of the state, civil society and the private sector, to be mobilized for the achievement of equitable outcomes (Patel 2015). This vision was reiterated in the National Development Plan 2030 (NPC 2011).

We refer here to three different types of social security: social assistance, social insurance and public employment programmes. Table 1 gives an overall comparison of their budgets and reach in terms of beneficiaries (most recent in 2014/15 and ten years previously).

**Table 1. Budget Size and Numbers of Beneficiaries in South Africa's Social Security Instruments**

	2006/2007	2014/2015
<b>Social assistance</b>		
Social grants		
<i>Budget (ZAR)</i>	61.2 billion	127.5 billion
<i>Total recipients</i>	11.9 million	16.6 million
<b>Social insurance</b>		
Unemployment Insurance Fund		
<i>Budget expenditure (ZAR)</i>	3.6 billion	8.9 billion
<i>Registered employees</i>	—	8.7 million
<i>Claims registered</i>	572,000	708,467
Workman's Compensation Fund		
<i>Budget expenditure (ZAR)</i>	2.9 billion	7.9 billion
<i>Claims registered</i>	213,246	225,511
Road Accident Fund		
<i>Budget expenditure (ZAR)</i>	7.5 billion	29.7 billion
<i>Claims registered</i>	170,418	173,743
Expanded Public Works Programme		
<i>Budget expenditure (ZAR)</i>	7.2 billion	18.9 billion
<i>Full-time equivalent jobs</i>	85,702	387,278
<i>Work opportunities</i>	316,814	1,103,983

Sources: (R.S.A. 2007, 2009, 2010, 2015a, 2015b, 2015c, 2015d, 2015e, 2016a, 2016b, 2016d; SASSA 2015)

**Social assistance** has been dramatically expanded over the past twenty years and has been an important tool for the government to redress historical injustices and inequities. Non-contributory (that is not requiring monetary contributions by beneficiaries) social grants target the poorest and most vulnerable groups in society—primarily elderly, disabled and young persons. Today, the South African government distributes more than 17 million social grants, reaching over a third of the South African population. There are seven different social grants: Old Age Pension, Disability Grant, Child Support Grant (CSG), Foster Child Grant, Care Dependency Grant, Grant in Aid, and War Veterans' Grant. The CSG (with 12.1 million recipients), the Old Age Pension

(with 3.3 million recipients), and the Disability Grant (with 1.1 million recipients) are the largest grants in reach (SASSA 2017). In addition, the Social Assistance Act of 2004 makes provision for the social relief of distress as a temporary assistance measure. The South African Social Security Agency (SASSA) is responsible for the implementation of the social grants in South Africa (Woolard et al. 2011).

**Social insurance** schemes are contributory and can be divided into mandatory social insurance (statutory funds for which membership and contribution is compulsory) and voluntary social insurance funds (regulated by the state but provided by the private sector). The state is responsible for the Unemployment Insurance Fund (which provides for the short-term payment of unemployment, illness, maternity, adoption and dependants' benefits); the Compensation for Occupational Injuries and Diseases (COIDA) (which provides compensation and medical care for disablement caused by occupational injuries or diseases sustained in the course of employment, or for death resulting from such injuries or diseases) and the Road Accident Fund (which provides compensation for loss or damage wrongfully caused by the driving of motor vehicles). Contributions for the UIF are made by either the employer or the employee, employers are taxed in order to contribute to the COIDA, and the RAF contributions are made by all road users via mandatory tax on fuel. Voluntary insurance schemes include medical schemes and retirement funds. The system of social insurance is largely linked to formal sector employment, which means that insurance coverage is uneven and favours the formal labour sector, with some exceptions. While South Africa has a good range of voluntary insurance policies provided by the private sector, and the middle and upper classes are well covered, there is an absence of compulsory social insurance in the areas of pension and medical benefits, with no direct legal obligation of employees to contribute to medical aid schemes and retirement funds. This results in the significant exclusion of a large number of people from accessing social security (Seekings 2008; Woolard et al. 2011).

**Public employment programmes** provide “state-sponsored employment for the working-age poor who are unable to support themselves due to the inadequacy of market-based employment opportunities” (McCord 2012:8). They are often used as one component of national social protection strategies, since they are intended to provide income that is regular and predictable, for people of working age and working capacity with insufficient earnings (Lieuw-Kie-Song et al. 2011). The Expanded Public Works Programme was launched in 2004 to harmonize a host of smaller public works programmes into one large national push for creating job opportunities. The programme is 12 years old now, is currently in its third phase and aims to create 6 million job opportunities by 2019, in infrastructure, environment and culture, non-state sector (non-profit organizations involved in community development initiatives), and the social sector. In a context of incredibly high unemployment—36.6 percent including discouraged workers (StatsSA 2017b)—the EPWP was established as one response to a lack of employment growth. The social and political ambivalence towards “handouts”, despite the clear positive effects of cash transfers in the South African context, has made the public employment programme for the working-age poor a more politically desirable social security instrument as it is seen as promoting self-reliance and a work ethic, despite the lack of evidence of “dependency” for social assistance or efficacy of public employment programmes (McCord 2009; McCord and Meth 2013).

**Other social protection services.** It is important that we note that within a wider social protection strategy, the interventions that we have listed are complemented by several



others, including basic education, primary health care, housing, basic municipal services and welfare services. Combined these aim to reduce the cost of living for low-income and working-class households in order to broaden economic participation and inclusive growth. Overall, in 2013, spending on social development, health, education, housing and local amenities accounted for almost 60 percent of public expenditure (R.S.A. 2013). Primary health care is available free of charge and hospital services are provided at low cost according to income level, with exemptions provided for children under six, pregnant women and social grant beneficiaries. The introduction of the National Health Insurance scheme, currently in its pilot phase, will seek to make quality health care accessible to all. Since 2007, the government has supported “no fee schools”, which are identified according to the income levels of the surrounding communities. One large scheme that complements interventions for children is the National School Nutrition Programme, a government programme that provides one nutritious meal per day to 9.1 million (in 2013/14) learners in the primary and secondary schools categorized as falling into the somewhat deprived, deprived and most deprived schools in the country (R.S.A. 2014a). Over the past 20 years, housing initiatives have provided about 2.8 million government-subsidized houses for low-income families and over 875,000 serviced sites in the informal settlement upgrading programme, which gives residents the right of occupation and provides infrastructure such as roads, lighting, water and sanitation. Progress continues to be made in extending free access to electricity, water, sanitation and refuse removal services. While these services are not the focus of this study, it is important that future research investigates the gendered effects of these programmes, and of the social package as a whole.

### **3.3 Gender and social policy**

In the South African context, a gendered legacy is interwoven with the complex tapestry of livelihoods of the poor majority of the population. Household configurations are often stretched across urban and rural locations, and household members are engaged in multiple and varied activities (Neves et al. 2009). Two million households (18 percent) had an absent member (in 2008), typically a migrant worker, or an individual looking for work away from their home area (Posel 2017). Women are generally poorer than men, more vulnerable and at higher risk of domestic violence, abuse and HIV. Given their responsibilities for the welfare and health of (extended) family members, women often struggle to access and maintain their position in the labour market, and experience disproportionate barriers in accessing property, credit, skills and social participation (Bentley 2004). Childcare frequently remains a form of unpaid labour, with less than minimal state provision (Patel 2009). Furthermore, lack of access to basic services such as water, sanitation, electricity and transport can increase the cost of care-giving in time, physical energy expended and hidden financial costs that caregivers and their families and households have to bear (Patel 2016; Razavi 2007).

Constitutionally, women and men are equal before the law in South Africa, and unfair discrimination is prohibited. This principle was, for example, applied to remove the pro-women bias in the Old Age Pension. Previously it was paid to women at the age of 60 years but to men only at the age of 65. Following a court case, the age-eligibility criterion was set to 60 years for both women and men in 2010 to meet “South African expectations of gender equality that are enshrined in the constitution” (Møller 2010:147).

Some scholars argue that the pressing focus in social security policy frameworks on addressing socio-economic and racial inequalities in the democratic dispensation has to some extent overshadowed attention on gender inequalities and disparities (Hassim

2008; Hassim and Razavi 2006). Despite its transformative remit, the policy framework of the White Paper for Welfare was criticized for not locating care within a social rights framework, with a broad understanding of care services as a public good, a social investment in current and future social well-being, with an emphasis not only on addressing gender discrimination, but on explicitly identifying the roles of various actors (including the state) in meeting people's care needs and offering greater public support for care services delivered by women in the home (Patel 2016). Despite efforts to quantify the economic contribution of unpaid care work to economic growth and national well-being, these participation rates remain largely invisible to policy makers and planners (Budlender 2010). The government's recent National Development Plan 2030 has made little mention regarding the gendered nature of welfare services (Patel 2016).

In South Africa, as in many other countries, despite the promotion of gender equality only being a secondary or indirect programme objective in many cases, in practice patterns of participation in social assistance, social insurance and public works interventions (described in the sections that follow) are gendered, and therefore differentially related to the well-being and empowerment of women and men.

## **4. The Child Support Grant**

### **4.1 Overview**

The Child Support Grant (CSG) is a publically-funded, means-tested monthly cash grant paid to the primary caregivers of children living in poverty, reaching more than 60 percent of all children under the age of 18, over 12 million children each month (SASSA 2016). It is the largest unconditional cash transfer programme in Africa in terms of the number of beneficiaries reached (Honorati et al. 2015). It is widely recognized to be among a range of innovative social protection programmes in the Global South (European University Institute 2010). The CSG was initiated in 1998 as one of the earliest welfare policies introduced by the first democratic government of South Africa. At its inception, it consisted of a cash transfer of ZAR 100 per child. Access to the grant has since been substantively scaled up and extended. The age threshold has been gradually raised from seven to 18 years (in 2008). The value of the grant has risen in line with inflation and is currently ZAR 380 (as of April 2017). The income threshold varies from ZAR 3,600 per month for a single person with children and ZAR 7,200 per month for married persons. Eligibility is capped at a maximum of six children<sup>4</sup>. The CSG was originally intended for South African citizens only, but after a court challenge, the grant was extended to permanent residents and those with refugee status in South Africa<sup>5</sup>.

The CSG was designed to be gender-neutral and relevant to the realities and challenges of households in South Africa, where mothers are not always able to live with the child (for instance due to the need to migrate for work, and high levels of HIV/AIDS) (Budlender and Woolard 2006; Lund 2008). The designated recipient of the CSG is the child's primary caregiver, who may be male or female and who is defined as the person that takes primary responsibility for meeting the daily care needs of the child.

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<sup>4</sup> <http://www.sassa.gov.za/index.php/knowledge-centre/grant-booklets?start=6> (accessed 14 Nov. 2016)

<sup>5</sup> <http://www.sassa.gov.za/index.php/social-grants/child-support-grant>

The CSG is a rights-based entitlement and was designed to be redistributive. It was explicitly intended to contribute to the well-being of young children (primarily their food requirements) who were among the poorest and most vulnerable groups in the society (Lund 2008). As the discussion that follows shows, the CSG does have multiple benefits that accrue directly to women (Patel et al. 2015). However, from a gender perspective, it has been argued that the design of the CSG is not primarily aimed at reducing poverty among and enhancing empowerment of women per se but rather channels resources to children via women, and thus supports traditional expectations of women to provide unpaid care work, a finding also observed in conditional cash transfer programmes in Latin America (Molyneux 2007). This view is bolstered by the historical evolution of the CSG. The CSG's problematic and racially discriminating predecessor, the State Maintenance Grant had a parental and a child component, whereas the CSG does not include a direct benefit for the parent or guardian. It has been argued that the removal of the parent's component has gender implications as by far most caregivers are women and since the caregiver's unpaid care work is no longer recognized and rewarded<sup>6</sup>.

## ***4.2 Are social and economic outcomes of the CSG redistributive?***

There is a substantial body of evaluative evidence detailing the social and economic impacts of the CSG. We focus in this section especially on findings which have been disaggregated by gender, in relation to access to social security, poverty levels, access to labour markets and other redistributive programmes.

The majority (98.1 percent) of CSG recipients are women (mothers, grandmothers or other female caregivers) (SASSA 2014), although in terms of child beneficiaries, the numbers are evenly split between girls and boys (Brockhoff 2013). There has been little research into the low take-up of the CSG by male caregivers, and their use of the grants when they do receive it (Patel et al. 2012; Patel 2017 forthcoming).

Social grants (including the CSG) have had a substantial impact on the incidence and depth of poverty and inequality (Woolard et al. 2011; World Bank 2014). The CSG effectively targets the poorest, and increases the market incomes of the bottom income decile by almost four times (Inchauste et al. 2015). The CSG is tax-funded, it is redistributive from rich to poor (and from men to women as we show below), both independently and combined with other grants (Inchauste et al. 2015). If grants were not available, income inequality as measured by the Gini coefficient would have been substantially higher at 0.74 instead of 0.69 (Bhorat and Cassim 2014). Longitudinal studies have shown that poverty rates began to fall in the period post 2001 when government spending on social grants increased and the take-up of the Child Support Grant expanded (Posel and Rogan 2012).

The receipt of social grant income has been most effective in assisting women and female-headed households. However, this has not been sufficient to overcome the poverty gender gap and poverty still remains a gendered phenomenon. The extent and depth of poverty are higher for females and for female-headed households compared to their male counterparts (Posel and Rogan 2012). Although the monetary value of the grant is small, it plays a key role in reducing income poverty and in ensuring women's access to resources, especially in female-headed households (Patel et al. 2012). Qualitatively, grants are viewed as redistributive by recipients themselves. By enabling

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<sup>6</sup> Budlender and Woolard 2006; Hassim 2008; Goldblatt 2005

access to resources necessary for survival and supporting livelihoods, they are perceived as supporting agency and capabilities, for women especially (Hochfeld and Plagerson 2011). Increased income through grants is also associated with higher likelihood of having bank accounts, life insurance and some form of savings<sup>7</sup> (such as *stokvels*<sup>8</sup>).

As a long-term investment in human capital, the predictable and reliable nature of the CSG as a source of income has been shown to reap benefits in nutrition, health and education. Improved ability to care for children has been frequently identified as a positive outcome by CSG recipients, with grant money mainly used for food, clothes for children, medical costs, school-related costs and transport<sup>9</sup>. Qualitative and quantitative studies have demonstrated positive effects on reduced child hunger (Samson et al. 2008; Neves et al. 2009), improved child nutrition and early childhood development (Agüero et al. 2007), and improvements in overall health status (Williams 2007). School enrolment rates are high in South Africa and generally undifferentiated by gender (98 and 99 percent between the ages of 7 and 13, and 92 percent on average between the ages of 14 and 17 in 2007) (Delany et al. 2008; Neves et al. 2009). Despite this high base, various studies have observed a positive association between improved school enrolment rates and receipt of the CSG<sup>10</sup>. Positive findings have been observed for educational attainment, with the strongest impacts for girls and in cases of early and regular access to the CSG (Heinrich et al. 2012). Among adolescents, a household's receipt of the CSG reduced adolescent absences from school, particularly for male adolescents, even when the household did not receive the grant specifically for the adolescent (Heinrich et al. 2012). Also, the longer the grant is received, the lower the incidence of sexually risky behaviour among adolescent girls (Cluver et al. 2013). Beyond statutory education, a link has been found between CSG receipt and pre-school attendance (Delany et al. 2008; Devereux et al. 2011a).

Only 13 percent of CSG recipients have employment with a regular wage (Patel et al. Forthcoming). From a gender perspective, many structural and social factors serve as barriers to women's employment: high female unemployment nationally; a lack of absorption into the labour market of women with lower levels of skill; low levels of education and employment in low paid jobs, heavy domestic and care responsibilities in the home with limited external support and inadequate child care services which is particularly important where there is huge spatial separation between home and work (Patel, et al. 2015). Yet even against this backdrop, there are indications that the relatively small Child Support Grant is associated with a higher probability of female participation in the broad labour force and a higher probability of being employed<sup>11</sup>. The findings are in contrast with common fears that social grants create dependency (Williams 2007). Within the constraints imposed by the small amount represented by the CSG, and the evidence that these are primarily spent on food and children's basic needs (Vorster and de Waal 2008), these findings suggest that the grants may enable poor individuals to subsidize childcare costs, finance and alleviate constraints to job search, finance migration, manage negative shocks, fund small enterprise creation, and improve productivity through better health, nutrition and training (Devereux et al. 2011a; Williams 2007).

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<sup>7</sup> Delany et al. 2008; Neves et al. 2009; Patel 2012

<sup>8</sup> A savings or investment society to which members regularly contribute an agreed amount and from which they receive a lump sum payment.

<sup>9</sup> Patel et al. 2012; Plagerson et al. 2011; Vorster and de Waal 2008; Devereux et al. 2011a; Delany et al. 2008

<sup>10</sup> Williams 2007; Budlender and Woolard 2006; Case et al. 2005; Samson et al. 2005; Samson et al. 2004

<sup>11</sup> Eyal and Woolard 2011; Surender et al. 2007; Williams 2007; Samson 2009; Leibbrandt et al. 2013

With regard to child labour, there is some evidence that early receipt of the Child Support Grant (in the first seven years of life) reduces the likelihood that beneficiaries (especially girls) will work outside the home when they reach adolescence (Heinrich et al. 2012). However, this finding was not confirmed in the qualitative component of the study (Devereux et al. 2011a).

The redistributive and poverty-reducing potential of the CSG has been limited by poor linkages with other strategies that can enhance the well-being of women and alleviate some of the burdens in the domestic sphere. Few public social programmes are deliberately designed to connect grant beneficiaries with existing poverty reduction programmes, such as employment programmes, adult basic education programmes, childcare services, transport, free housing and free access to basic services such as water, sanitation and electricity (Plagerson and Ulriksen 2013). CSG recipients were found to be only marginally more likely to access different services and poverty alleviation measures than non-CSG recipients, which for women could alleviate care burdens<sup>12</sup>. In a study from 2008, very few of the respondents had worked on a public works programme in the previous two years, and there was no statistically significant difference in levels of participation between CSG recipients and those not receiving the grant (Delany et al. 2008). These weak linkages constrain the CSG's potential to be fully functional as a social investment that builds human capabilities (Patel et al. 2012).

### ***4.3 Are the social and economic outcomes of the CSG transformative?***

Although the CSG was not designed to promote gender equality, its potential to contribute to social transformation, and the related challenges, have been evidenced.

Dignity is a common theme in the narratives of beneficiaries, who feel validated in their personal, caring and social roles as a result of the CSG, demonstrating a close relationship between economic redistribution and human dignity in the lived experiences of grant recipients (Hochfeld and Plagerson 2011). Beyond the confines of the household, the CSG has been associated with increased capabilities to fulfil societal roles, and to embrace active citizenship. Participation in burial societies, savings groups, community forums and engagement with political processes have been detailed in several studies<sup>13</sup>.

Yet the CSG is also associated with gender discrimination that has negative impacts on social recognition. Negative discourses are common in the media and within beneficiary communities that construct women as self-serving and a drain on resources, despite the evidence that show its poverty-alleviating effects (Marais 2011; Surender et al. 2010). These include concerns that CSGs incentivize childbirth, and more generally about a lack of responsibility among young mothers for their children and inappropriate use of the grants for personal consumption (Hochfeld and Plagerson 2011). However, studies investigating these claims have found no evidence of widespread perverse incentive effects of social grants but show that the vast majority of mothers use the grant in ways that are beneficial for their children and households<sup>14</sup>. Nonetheless, these trends can undermine beneficiaries' and children's rights to social assistance, and may stigmatize women for relying on grants, engendering a lack of cultural and social value for them despite their substantial social contributions via both informal productive labour and

<sup>12</sup> Delany et al. 2008; Lund 2011; Patel et al. 2012

<sup>13</sup> Neves et al. 2009; Plagerson et al. 2012; Patel et al. 2014; Patel et al. 2012; Plagerson and Ulriksen 2013

<sup>14</sup> Goldblatt 2005; Hochfeld and Plagerson 2011; Makiwane 2010; Rosenberg et al. 2015; Steele 2006

unpaid caring work (Hochfeld and Plagerson 2011; Hochfeld and Plagerson Forthcoming).

CSG recipients typically collect and manage the grants and report relatively high levels of financial decision-making autonomy<sup>15</sup>. While the CSG does not significantly alter power relationships between women and men in terms of spending decisions, it does support recipients' economic independence within the household, enabling women to allocate financial resources for their preferred welfare-related and income-generating goals (Patel and Hochfeld 2011; Hunter and Adato 2007). A larger proportion of rural and informal urban resident women indicate being involved in financial decision-making than women in formal urban areas, a dynamic that probably reflects the greater likelihood of resident male partners in the latter group (Neves et al. 2009). In contexts where households receive both pensions and CSGs, there are indications both of relieving and accentuating tensions around the financial burden of raising children in multi-generation households (Møller 2010; Goldblatt 2005).

As Section 4.2 demonstrated, the CSG has been shown to support women both in their reproductive and productive roles. Yet, a transformative analysis suggests that the feminization of social grants does not automatically overcome the challenges that women face in bridging their double roles as poorly rewarded carers and productive economic agents<sup>16</sup>. Multiple studies have shown how the CSG enables women to provide for the welfare of children in their household, particularly through food and education expenditure (Section 4.2). One study showed that CSG beneficiaries were more actively engaged in care activities with their children (Patel, Knijn and Van Wel 2015). The previous section also described research findings showing that the CSG can support job-seeking behaviour for working-age women and childcare costs within the extended household. These findings portray women as active respondents to increased capabilities, contrary to common public concerns that the CSG creates welfare "dependency". Indeed, public narratives fail to recognize the contradictions between the expectation that women should look after children, and the expectation that they should not be dependent on public support, thereby requiring them to participate in the labour market. Combined these assumptions suggest that the reality of women raising children outside the male breadwinner model is not accepted: dependency on a spouse is accepted, while dependency on the state is not. While the Child Support Grant does ease women's burden of care, responsibility for household and child survival, and support their financial independence, at the same time, "women remain largely responsible for caring and looking after families, with few signs of increase in men's participation in gender exchanged roles. Social transfers do not on their own transform gender relations" (Plagerson and Ulriksen 2013:25). Furthermore, this status quo can weaken women's ability to access and maintain their position in the labour market (Lund 2008; Patel and Hochfeld 2011).

The lack of fundamental shift in gender relations is confirmed by the changing patterns of childcare, redistributed between women within the extended household and across generations, not between men and women. Conversely, however, there is some evidence in South Africa of men in beneficiary households increasingly positively engaging in family relationships, especially in providing help with children (Richter and Morrell 2006; Patel et al. 2012). These are not necessarily biological fathers, but other relatives or partners of the caregiver. When, for many reasons, children are brought up not

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<sup>15</sup> Delany et al. 2008, de Koker et al. 2006, Patel et al. 2015

<sup>16</sup> Sabates-Wheeler and Roelen 2011; Patel et al. 2012; Plagerson and Ulriksen 2013

residing with their biological mothers, grandmothers and other unemployed adult women, are the most common caregivers (unlike in other countries where young girls may be withdrawn from school to provide care). The combination of Child Support Grants and Old Age Pensions supports these arrangements and provides an important income source through which elderly caregivers are able to meet childcare and educational costs (Burns et al. 2004). While social grants strengthen networks of care, Neves et al. (2009) caution that they can also potentially place even larger responsibilities for the dispensing of care on economically marginalized women, who already bear considerable burdens sustaining their households. While research on the CSG has helped to highlight the gendered nature of care, and of the role of women in the care of children (including biological children, grandchildren or children of close relatives), the CSG has not served to significantly shift the boundaries and social expectations around care responsibilities. These remain unpaid, falling largely on women's shoulders and still to a large extent invisible.

## 5. Unemployment Insurance Fund

### 5.1 Overview

The Unemployment Insurance Fund (UIF) pays benefits in the event of unemployment, illness, maternity, the adoption of a child and death (by assisting family members of the deceased) (Mpedi and Fourie 2008). The mandate of the unemployment insurance system is to contribute “to the alleviation of poverty in South Africa by providing effective short-term unemployment insurance to all workers who qualify for unemployment and other related benefits” (R.S.A. 2015e).

The Fund is legislated for in the Unemployment Insurance Act 63 of 2001 (UIA), and falls under the auspices of the Department of Labour. Historically, it was established as a response to the poverty experienced by sections of the White population in the 1920s and 1930s, and exclusively targeted the minority White population. Some of the inherited fragmented and industry-defined provisions (dating back to the Unemployment Benefit Act 25 of 1937) have to some extent determined the contours of the current UIA legislation (as described in several sections below) (Mpedi 2014; Strydom 2006).

The UIF is financed by the monthly contributions of employers and employees, from which employees can benefit if they become unemployed (Bhorat et al. 2013). Employees who work less than 24 hours per month and those in the public sector are excluded from the UIF (currently public sector employees are beneficiaries of a private insurance scheme). The benefit amount for claimants is dependent on the wage level of the claimant prior to applying for unemployment benefits and the previous length of time in employment, up to a maximum of 238 days of benefits available to an employee who has contributed continuously for four years.

Almost 1.6 million employers and 9 million employees are registered with the UIF (R.S.A. 2016e:64-66). In 2014/15, the Fund's total revenue was ZAR 24 billion, while expenses amounted to ZAR 16.7 billion, of which ZAR 7.8 billion was paid to 691 356 beneficiaries<sup>17</sup> (7.7 percent of registered contributors) (R.S.A. 2016e). Unemployment through job loss is consistently the category with the biggest claim volumes (82.1 percent), followed by maternity or adoption claims (13 percent), claims by dependents of deceased contributors (2.4 percent) and illness (2.3 percent) (R.S.A. 2016e). The fund

<sup>17</sup> Equivalent to 96 percent of claims approved.

has an enormous accumulated and growing surplus of ZAR 124.7 billion, accrued over twenty years through re-investment of unspent net income (R.S.A. 2016e). A small proportion of the UIF's budget (ZAR 338 million instead of the budgeted ZAR 400 million in 2015/6) is devoted to "government initiatives to create and sustain decent employment, such as training support for artisans and support for companies at risk of retrenching workers" (R.S.A. 2016e:13).

The Unemployment Insurance Fund provides maternity benefits as prescribed by the Unemployment Insurance Act (UIA) (R.S.A. 2001). The provision dates back to the previous UIA of 1966's social and economic provisions and represents a specific recognition of working mothers' needs. Legislation for maternity leave is also covered in the Basic Conditions of Employment Act (BCEA) which sets out the basic minimum entitlements of employed pregnant women regarding leave periods, and exposure to dangerous working conditions during and immediately after pregnancy. For UIF maternity claims, the maximum period of maternity leave is 17.29 weeks and 6 weeks for a miscarriage or stillbirth (R.S.A. 2016e). To gain maximum credit for the full period of maternity pay it is necessary to have worked continuously for four years. An application for maternity benefit must be made at least eight weeks before childbirth and approved by a claim officer (R.S.A. 2001).

The primary focus of the UIF is on the formal employment sector (where males and Whites are over-represented) and to the segment of the unemployed who have previously been employed (Bhorat et al. 2013). However, making steps towards greater inclusivity in 2003 the UIF extended coverage to certain informal employment sectors such as domestic workers, workers in the taxi industry and seasonal workers. The extension of social security benefits to domestic workers was part of a broader push to improve regulation and protection of the sector which was previously unregulated and thus prone to very low wages and exploitation. An amendment to the BCEA stipulated that domestic workers should be registered with the Department of Labour, that employers should contribute to the UIF, and that workers should have formal employment contracts that stipulate working hours, remuneration and procedures to be followed in the event of contract termination (Dinkelman et al. 2014). Amendments introduced in 2003 were also favourable to women since they provided for higher payments to lower income workers (Woolard et al. 2011). The extension of social security benefits was part of a broader push to improve regulation and protection of the sector. An amendment to the BCEA stipulated that domestic workers should be registered with the Department of Labour, that employers should contribute to the UIF, and that workers should have formal employment contracts that stipulate working hours, remuneration and procedures to be followed in the event of the contract being terminated (Deacon et al. 2015; Dinkelman et al. 2014).

The inclusion of domestic workers could be viewed as an implicit nod to gender equality, given that the average domestic worker is female. Domestic workers are a significant, and primarily female, component of the labour force, responsible for cooking, cleaning, child and elderly care in many private households (Du Toit 2013). The Quarterly Labour Force Survey (first quarter of 2016) recorded 984,000 domestic workers (down from over one million in 2015). Paid domestic work is one of the few employment opportunities open to poor women, though women are often subjected to long hours and low wages, with few benefits. Domestic work has often occurred in precarious and insecure contexts, with less legal or social protections compared to other wage workers, and often without maternity leave, health care or pension provision



(Vanek et al. 2014). Thus overall, on a policy level the UIF has made some progress towards realizing unemployment protection for some of the most vulnerable women in the job market (Olivier et al. 2003).

On account of the growing surplus and persistent unemployment, proposals have been put forward by the Department of Labour and other non-governmental institutions for ways to use the fund (T.I.P.S. 2016; NPC 2011). A recently proposed Unemployment Insurance Amendment Bill is under discussion and has proposed extensions in maternity, illness and death benefits for eligible contributors, inclusion of public sector employees and the creation of a job fund to target unemployment and reintegration using the surplus money available in the Fund (R.S.A. 2014b). The proposed programmes extend current allocations, representing a small proportion of the fund surplus, to programmes which provide training for the unemployed and protect jobs by supporting companies in distress and the training layoff scheme, in order to prevent retrenchments. However, these still fall short of alignment with a broad vision for comprehensive social security (where social assistance and social insurance provide joined-up coverage) (Olivier and Govindjee 2015).

## **5.2 Is the UIF redistributive (for women)?**

This section briefly reviews available research on the relationship between gender and the UIF. Data regarding the gender-differentiated social and economic impacts of the UIF on poverty is very limited. But some indications can be inferred from access and claims data. We comment in this section on male/female access to the UIF, maternity claims and on access to the UIF for domestic workers.

In a context of high unemployment, the UIF system plays a key role as the only public social insurance programme in South Africa that caters to the unemployed (Bhorat et al. 2013). Yet its redistributive role is played out within the narrow confines of those who are entitled to be registered and access benefits through the Fund. The UIF's coverage is limited, with less than 5 percent of the unemployed receiving unemployment benefits at any given time (NPC 2011). The vast majority of the unemployed who fall outside the system include the unemployed who have never worked as formal employees and thus have not contributed to the fund, and those who have been unemployed for more than a year. Overall the redistributive role of the UIF is still confined to a small sub-section of the unemployed, leaving many vulnerable groups, such as those who have never worked as formal employees before and many of those in the informal sector, in which women are overrepresented, excluded.

It is true that the Fund does to some extent fulfil its poverty alleviation mandate, by smoothing incomes and alleviating the social and economic costs of unemployment (NPC 2011). From 2004 to 2014, the UIF paid out ZAR 40.6 billion to 5.7 million beneficiaries in unemployment benefits. Retrenchment claims increased during 2009-2010, highlighting the role of the UIF system during periods of financial crisis (Bhorat et al. 2013). This role is set to increase, under proposed amendments, to extend the duration and amount of benefit payments.

Women remain underrepresented as contributors and claimants. As a general support mechanism to women experiencing unemployment, especially those who are low paid or who experience job insecurity, the UIF has a weak record. As in previous years, in the second quarter of 2016 more men contributed to the UIF than women: 55 percent of contributors were men while 45 percent were women (StatsSA 2017b). In terms of claiming from the UIF, the data shows that men display an even greater dominance and

women have become more disadvantaged with time since their representation ratio has declined from 0.99 in 2005 to 0.75 in 2011 (reaching its lowest point during the financial crisis in 2009-2010) (Bhorat et al. 2013).

For those who do make claims, the structure of the UIF benefit system is progressive with higher income replacement rates for those on lower incomes (though they remain low in absolute terms). Analysis of claimant trends in the period between 2005 and 2011 showed that females, younger claimants and claimants with less potential benefit days enjoyed better relative replacement rates compared to males, older claimants and claimants with more potential benefit days (Bhorat et al. 2013). However, males accessed unemployment insurance for longer than females (an average of 144 days for men compared to 138 days for women as a first time claim). Credit exhaustion rates were also marginally higher for females than males. Taken together, various reasons have been put forward to explain the disparity between men and women in access to the UIF and claim behaviour. Women are overly represented in part-time, low-income, intermittent and precarious jobs and as a result build up less credit days to be entitled to claim unemployment benefits, possibly find it more difficult to physically claim due to location, and pressing parental responsibilities limit women's time to build up their social security entitlements (Bhorat et al. 2013; Centre for International and Comparative Labour and Social Security Law 2007). The data also suggests that female claimants are more reliant on unemployment benefits than their male counterparts since they take longer to find employment or that they opt to utilize the full period of replacement income during periods of unemployment, for instance, because of greater household responsibilities.

Despite the progressive features of the UIF, overall, Bhorat et al. (2013) conclude that the design of the UIF system appears to favour better off claimants, for two reasons. First, claimants in lower salary categories are eligible for lower absolute benefit amounts and for shorter time periods. Secondly, between 2005 and 2011, there was a relatively faster growth in wealthier claimants relative to their poorer counterparts (Bhorat et al. 2013). In reality, poverty alleviation does not appear to be a driving goal of the Fund. Funds earmarked for poverty alleviation schemes such as assisting companies to prevent retrenchments and training programmes for unemployed contributors, have been severely underspent. Expanded proposals in the Amendment Bill still fall short of a strategic contribution to the broader vision to combat structural unemployment outlined in the National Development Plan.

The UIF provision of maternity benefits has benefited a growing number of women within the formal and informal employment space. Take-up of UIF maternity benefits has increased over time, from 72,000 claims in 2004/05 to 105,021 in 2013/2014, with a subsequent drop to 90,562 in 2015/2016 (R.S.A. 2016e). In monetary value, maternity claims represent 13 percent of all UIF benefits disbursed (equivalent to ZAR 818 million) (R.S.A. 2016e:68). Yet, available evidence indicates that the reality experienced by women remains precarious. Research has shown that the complicated bureaucracy involved in accessing maternity benefits is a concern, with long delays in the disbursement of claimants' maternity benefits. This drastically undermines the potential benefits of the money. If benefits are not received during the maternity period, mothers may not be able to remain on leave or may suffer as a result. There are also implications for the nutritional intake of a newborn as, without sufficient income, new mothers might go hungry, affecting the health of their children. Further financial pressures may occur as a result of the maternity benefit being smaller than a woman's

salary (38-60 percent of salary), increasing the chance of mothers not taking the full four months to which they are entitled. As a result, administrative barriers have been criticized as inhibiting rather than supporting the aims of the system to assist women in exercising their reproductive rights (Boswell and Boswell 2009).

The proportions of domestic workers covered by contracts and UIF contributions showed a large increase in the 18 months following November 2002, albeit from a low base. Before the enactment of the law, 10 percent had employment contracts and 2 percent were covered by UIF. After the law had been implemented, the fraction of workers with a contract rose to 27 percent, and those registered with UIF to 21 percent. Steady increases in the numbers of registrations of domestic employers have continued to occur, and a recent report showed that 667,300 domestic workers were registered with the UIF in March 2016 (66.1 percent of domestic workers) (R.S.A. 2016e). Nonetheless, many remain unregistered, primarily due to widespread non-compliance by employers since UIF coverage for domestic workers is still dependent on registration of employers with the UIF. Only domestic workers who are actually registered are entitled to claim unemployment, illness, maternity and adoption benefits and their dependents may be able to claim benefits when the domestic worker dies (Malherbe 2013). Qualitative research has also confirmed the difficult working conditions, long working hours, low levels of remuneration and poor regulatory compliance that still characterize the industry (Deacon et al. 2015; Dinkelman et al. 2014). Unemployment benefits payable upon dismissal are particularly necessary in the context of the job insecurity with which many domestic workers are faced. However, the low wages received by domestic workers and the precarious nature of work (many domestic workers work part-time for several employers) in this sector mean that the amount of benefit to which they are entitled may be too limited to provide any meaningful level of income security.

There are some provisions that complement maternity leave provisions, such as Child Support Grants for the children of caregivers earning less than the means test threshold. There is some provision for childcare through subsidies to the Early Childhood Development sector, but in general the care of children under the age of three is considered the responsibility of parents and extended families, private institutions and non-governmental organizations (Smit 2011; Mokomane 2011). These complementary interventions remain fragmented. In terms of social security as a whole, provision for domestic workers remains patchy, given the exclusion for example from access to the Compensation for Injuries and Diseases Act (COIDA).

### ***5.3 Is the UIF transformative (for women)?***

Changes in legislation have mainly been in the direction of greater inclusivity, with some recognition of the implications for legislation of gender equality considerations. However, an analysis of the transformative potential of the UIF is limited by the lack of available data. The UIF Annual Report 2015 itself notes the lack of reliable data regarding skills development and employability programmes that have been implemented (R.S.A. 2015e).

The right to maternity leave and maternity benefits is integral to the intersection of women's care and economic roles in society and has important implications for the social and economic well-being of women. Relevant legislation and the availability of maternity benefits for mothers registered with the UIF represent an important recognition of working mothers, and their combined productive and reproductive roles. While maternity benefits are institutionally problematic (such as delays and difficulties

in claiming) and do not extend to cover nearly enough women (as they often have not contributed enough to receive full benefits), it is an important mechanism which can have symbolic and substantial value for women. Yet, these provisions remain confined within a narrow paradigm of assistance to women. They are provided as a social right to women in employment rather than as a universal right to all women. They are primarily designed to protect the health of the mother (and child) rather than to enhance women's social rights, through a holistic approach to work/family balance and gender equality considerations. They fall short of a holistic approach to integrating the respective roles of the state, the family, the private sector and the voluntary sector. In a context of increasing feminization of the labour market, despite broad acceptance of women entering the workplace, traditional attitudes towards gender role division within household persist and are echoed by current policy approaches (Gordon et al. 2012).

Nonetheless, a number of recent developments suggest that the overall approach to policy-making around maternity may be changing. The legislated extension of adoption benefits to both parents has been used to leverage demand for paternity leave on the basis of gender equality rights (Plagerson 2014). A Private Members Bill calling for paternity leave for new fathers was presented in Parliament in April 2016 (Van der Berg and Ferrari 2016). Furthermore, the Unemployment Insurance Amendment Bill proposes several changes to maternity benefits. These include increasing maternity benefits so that a woman will in the future receive maternity benefits at a flat rate of 66 percent, subject to an income ceiling, extending the period of time for which benefits can be claimed, and ensuring that a woman may still claim UIF unemployment benefits even if she was recently on maternity leave, and deleting the requirement to apply eight weeks before childbirth (R.S.A. 2014b).

The broader realities of women's experiences in the workplace compound the burden on women to realize their rights. According to the Employment Equity Act, no person may unfairly discriminate or dismiss an employee on the grounds of pregnancy or family responsibility. This includes the right to return to work after maternity. When claims have been made, the courts have upheld the notion that women are men's equal in the work sphere. Yet, Boswell and Boswell (2009) question the extent to which these rights are asserted and highlight a workplace culture in which "[t]he attitude of employers towards pregnant women is often discriminatory and devalues women's value in the workforce" and in which "[p]rocreation is seen as a hindrance to productivity rather than as a valuable social contribution and as the fundamental right of all women" (Boswell and Boswell 2009:78). Employees who are caregivers are therefore forced to rely on the willingness of employers to implement work-family reconciliation measures or to use their own resources to pursue claims of unfair discrimination based on family responsibilities (Mokomane 2011).

The inclusion of domestic workers in the UIF is progressive and provides a precedent for extending insurance to the informal sector. However, the data also shows that for transformative outcomes to be achieved, complementary interventions are necessary to overcome low wages and poor compliance by employers with legislation. In the context of South Africa's small formal labour market and high unemployment, it is important to know whether the regulation of an informal employment sector could have a real impact on the earnings and the conditions of employment within a certain segment such as domestic workers, particularly when there is weak monitoring and enforcement. The case of domestic workers shows overall positive effects regarding the inclusion of domestic workers as UIF contributors (Dinkelman et al. 2014). However, the extent to

which transformative outcomes can be achieved for domestic workers will depend primarily on the extent to which domestic workers' rates of remuneration can be improved and the extent of compliance by employers (Malherbe 2013).

## 6. Expanded Public Works Programmes (EPWP)— Social Sector

### 6.1 Overview

This case study examines the gendered social and economic outcomes of the social sector division of the Expanded Public Works Programmes (EPWP) programme. Under the EPWP's overarching goals of poverty reduction and job creation, the social sector was mandated specifically to provide job opportunities for women, and to provide an important service that had women and children as its primary beneficiaries (Skosana 2013; Parenzee and Budlender 2015). The social sector has a particular emphasis on training and promoting future employability (Budlender 2009). The term "career pathing" has been used by the sector to describe the "bridge to employment" that it aims to create (EPRI 2015).

The Department of Public Works (DPW) coordinates the EPWP programme as a whole. Under the oversight of the Department of Public Works, the co-ordinator of the social sector is the Department of Social Development (DSD) assisted by the Department of Basic Education (DBE) and the Department of Health. The work opportunities that the social sector provides are in delivery of social development and community protection services, with a primary emphasis on the first two programmes below<sup>18</sup>:

- **Early Childhood Development (ECD):** This service aims to provide education and care to children in the temporary absence of their parents or adult caregivers, usually on a daily basis. Services include provision of child health, nutrition, education, psychosocial and other needs for children, with an emphasis on early learning.
- **Home Community-Based Care (HCBC):** These programmes provide home-based basic health services within communities. Activities include administering medication, personal hygiene of persons with illness or disabilities and assistance with basic domestic needs such as cooking for persons with illness or disabilities.
- **School Nutrition Programme:** The programme employs community members as food handlers in the National School Nutrition Programme, which delivers one daily meal to every child at all poor schools nationally.
- **Community Crime Prevention:** This programme employs community members to improve service and infrastructure for community safety in their own neighbourhoods. This might include repairing fences or public lighting, or doing patrols.
- **School Mass Participation:** The programme provides work opportunities to sports coaches and encourages members of the public to participate actively in sports.
- **Kha Ri Gude** (Tshivenda for "et us learn") is a Mass Literacy Campaign aimed at inviting adults who missed out on their schooling, and who cannot read nor write, to join literacy classes provided across the country.

<sup>18</sup> [http://www.epwp.gov.za/sector\\_social.html](http://www.epwp.gov.za/sector_social.html)

The EPWP-SS expenditure for 2014/15 was ZAR 2.3 billion, equivalent to 12.1 percent of the total EPWP budget (R.S.A. 2015c). The social sector programmes have tracked and been influenced by the evolution of the EPWP programmes more broadly. Overall, the EPWP programme is now in its third phase. This continuation implies success, but there have been some major challenges since its inception. The first five-year phase (2004-2009) exceeded its target of one million work opportunities created. However, other targets (particularly training) were not met, and national unemployment rates were unfortunately unaffected by the programme, given the short-term focus of work opportunities, the weak focus on labour intensity and the impact of the global economic crisis (Vaughan 2016). Phase II (2009 – 2014) incorporated a number of improvements and innovations. Key changes included the introduction of a minimum wage and basic conditions of work for EPWP workers and a focus on accredited, specialized training versus the generic life-skills training previously offered (Vaughan 2016). In addition, the EPWP acknowledged that it was not a mechanism to move the unemployed into secure employment, but a means to provide a minimal level of temporary work opportunities for a proportion of the chronically unemployed. EPWP II reportedly created 4 million job opportunities, shy of its target by half a million (Vaughan 2016). Phase III, running from 2014 – 2019, is ambitious and aims to create 6 million job opportunities.

The inclusion of the social sector as a key division of the EPWP is unusual and innovative from a global perspective (Parenzee and Budlender 2015; Antonopoulos 2009). Its conception recognizes that care work is not only confined to the private sphere of the home, but also contributes to filling public infrastructural gaps and mitigating service delivery failures in the energy, health, social welfare and education sectors (Antonopoulis 2007; Razavi 2011). The simultaneous creation of work and the delivery of social services, frequently in the same communities, is an example of integrative social policy in action, with the “potential for synergy between social protection mechanisms” (EPRI 2015, 90). The potential to doubly benefit women as workers and beneficiaries, by relieving them of excessive burdens of unpaid care delivered privately through paid public service provision has been heralded as having the potential to contribute significantly to improving gender equality (Antonopoulis 2007; Antonopoulos 2009). However, it has also been argued that the inclusion of these social sectors was opportunistic, as many women were already doing HCBC and ECD work (Budlender 2009) and that the deepening of caring skills among women will not challenge traditional gender relations (Parenzee and Budlender 2015).

Several criticisms leveled at the EPWP as a whole are also relevant to the social sector. The EPWP is considered an improvement on the previous fragmented public works programmes of the past in South Africa. Bringing all the different projects under one policy and regulatory framework has helped to try and streamline and standardize outcomes to some extent. In policy terms, the EPWP has an important role of “contributing to the social security net and to community development, and possibly as a stepping stone to formal employment or self-employment” (Vaughan 2016:12). The consolidation of the regulations and focus is important symbolically, in that the state has recognized its responsibility to undertake social protection through the creation of work opportunities and training for the unemployed. Further, the work opportunity numbers have been impressive, although phase two did not reach its targets.

However, the successes claimed by the DPW in relation to the EPWP have been contested, as a number of key areas of functionality have been problematic. The following issues have limited the success of the EPWP:

1. **Expenditure:** Allocated budgets are far smaller than actual budgets, indicating a higher cost per each job opportunity created than originally intended. But at the same time, actual budgets are consistently underspent, which limits the reach of these programmes (McCutcheon and Taylor Parkins 2009).
2. **Labour intensity:** There has been a decline in labour intensity over time, indicating a failure especially in the infrastructural sector which was intended to *increase* labour intensity in EPWP projects. Even in the social sector (which is inherently labour intensive as it cannot be mechanized) this has fallen, which indicates not a decrease in productivity (where the “product” in the social sector is care service provision) but rather indicates an increase in administration costs (McCutcheon and Taylor Parkins 2009; Vaughan 2016).
3. **Temporary job opportunities:** The use of the term “work opportunities” has been very controversial. The term implies these have been full-time equivalent job placements, but in reality these have usually been temporary job opportunities. Even a job of a single day can be defined as a job opportunity, making the data on total job opportunities created difficult to use as it includes such a wide range of job durations (Bokolo 2013). Hence the success claims by the DPW have been criticized, as not all statistics separate out the job opportunities into short-term/temporary and full-time equivalent (FTE) jobs. In addition, the policy of providing temporary work has also been criticized in relation to outcomes for beneficiaries. “Two years of steady work would have a far more beneficial effect for both individual and family. It would have also allowed for a much greater depth of training.” (McCutcheon and Taylor Parkins 2009:207).
4. **Employability of workers:** The assumption that workers’ chances of employment will be enhanced via the work experience gained or training delivered via the EPWP is questionable, as the sectors in which EPWP runs are already over-supplied with labour (Bokolo 2013; McCord and Meth 2013).
5. **Substitution, displacement and relabeling:** Despite being contrary to the aims of the EPWP, processes of substitution (EPWP beneficiaries give up casual or informal work to take up EPWP employment), displacement (work previously done by permanent/private workers given to temporary EPWP workers, for example by municipalities) and relabeling (of pre-existing activities as EPWP) can mean that the EPWP does not create new work, and thus does nothing to reduce unemployment. While there are examples of these processes occurring, there is little authoritative data to judge the extent to which it does so (Butler and Cartwright 2016).

## **6.2 Is the EPWP-SS redistributive (for women)?**

An evaluation of the outcomes is severely hampered by weak monitoring systems across all the sectors of the EPWP. In the EPWP-SS, measurement indicators are inadequate to report on all aspects of the programme (EPRI 2015). Within these constraints we use available data to reflect on the poverty alleviation and labour market outcomes of the programmes.

As the social sector specifically engages with the gendered expectations of care work as a means to engage and benefit women, it has been successful in including women as participants. In 2012, 85 percent of the participants in the social sector were female

(Vetten 2015b). This is a higher percentage than in any of the other sectors. However, some have criticized the reinforcement of gendered care roles in this sector and the opportunistic use of a female dominated field to increase women’s EPWP participation (Parenzee 2015).

Progressive gender effects in other areas have been disappointingly limited, due to low stipends, temporary nature of work and administrative failures. One area of moderate success is that, overall, by targeting people living in poverty including women, youth and people with disabilities, the EPWP-SS stipend has provided some poverty relief to participant households. Researchers have estimated that the programme is associated with a reduction in participants living below the food poverty line from 55 to 40 percent (EPRI 2015). In qualitative research, participants indicated that their stipends “put food on the table”. This is an important achievement as the EPWP in South Africa has been designed, at its most fundamental, a programme to protect people from the worst consequences of structural unemployment (Vaughan 2016).

The positive effects of stipends on household income must be acknowledged and applauded, but it is objectionable that stipends in the EPWP-SS remain unacceptably low. In addition to the daily survival struggles that a very low stipend brings, this level of pay cannot facilitate the building up of social or financial assets which will have positive longer term effects for participants. The stipends across the EPWP vary from more than the minimum wage stipulated in the EPWP ministerial dispensation, to far below this minimum, indicating persistent lack of compliance by implementing departments and their partner organizations on conditions of employment in the EPWP (EPRI 2015). Below is a table indicating the average daily wage in each of the sectors in 2012 when the minimum wage for the EPWP was set at ZAR 63.18 per day (it is currently ZAR 70.59 per day) (Department of Public Works 2012; EPRI 2015). The stipend amount paid to EPWP-SS workers is consistently lower than the other sectors.

**Table 2. Sectoral Average Daily Wages and Percentage of Women Employed by Sector (1 April–30 September 2012)**

Sector	Percentage Women	Average Daily Wage	Number of Projects	Allocated Budget	Expenditure (Percent of Allocated Budget)
Infrastructure	51	101.79	2,915	60,093,833,954	4,538,533,922 (7.6)
Environment and Culture	53	82.23	2,045	7,626,812,352	1,243,352,700 (16.3)
Social Sector	85	40.19	6,967	4,594,900,576	1,035,536,536 (22.5)
Community Works	72	58.90	65	478,931,797	87,430,820 (18.3)
Non-State Organizations	75	43.48	187	809,050,121	68,618,790 (8.5)
Average/Totals	62	62.00	12,188	73.6 Billion	7 billion

Note: Currency for all wage and budget figures is ZAR  
 Source: Vetten (2015b, 64)

The table indicates that the lowest EPWP wages are in the social sector, followed by the non-state sector, which includes non-governmental organization (NGO) care services. EPWP wages have continued to follow the same pattern since 2012 (EPRI 2015). One



of the lowest paid participant categories of all are the National School Nutrition Food Handlers, who are paid ZAR 39 per day, far below the ZAR 70.59 ministerial determination minimum wage (EPRI 2015). In contrast, average monthly wages in the formal sector in the same time period equated to ZAR 13,960 (approximately ZAR 459 per day)<sup>19</sup>. Calculations of poverty lines for 2012 ranged from ZAR 12/day (food poverty line) to ZAR 28/day (upper bound poverty line) (StatsSA 2017a) which means EPWP workers are earning less than the food poverty line monthly, as they only work a few days per month on the programme. Vetten (2015b) argues that the amount of the average daily wage is inversely proportional to the percentage of women in a particular sector, meaning the more women in the sector, the less they are paid.

The EPWP-SS has tended to have longer periods of participation per individual than the other sectors. This is partly intentional as the nature of the service they deliver relies on building of relationships (September 2007; Lieuw-Kie-Song and Philip 2010), such as in HCBC and ECD. In the ECD sector, many participants have had one-year work opportunities renewed once or twice, and HCBC workers have in some cases been near “permanently” employed on the EPWP-SS (EPRI 2015). The benefits in terms of longer term income support and stability, and increased chance for training and therefore potential longer term employability, are offset by the exploitative terms of employment (EPRI 2015). The programmes have positive income-smoothing outcomes for women and their families, but in the longer term it locks them into low paid employment; few participants exit willingly due to the lack of alternative employment opportunities.

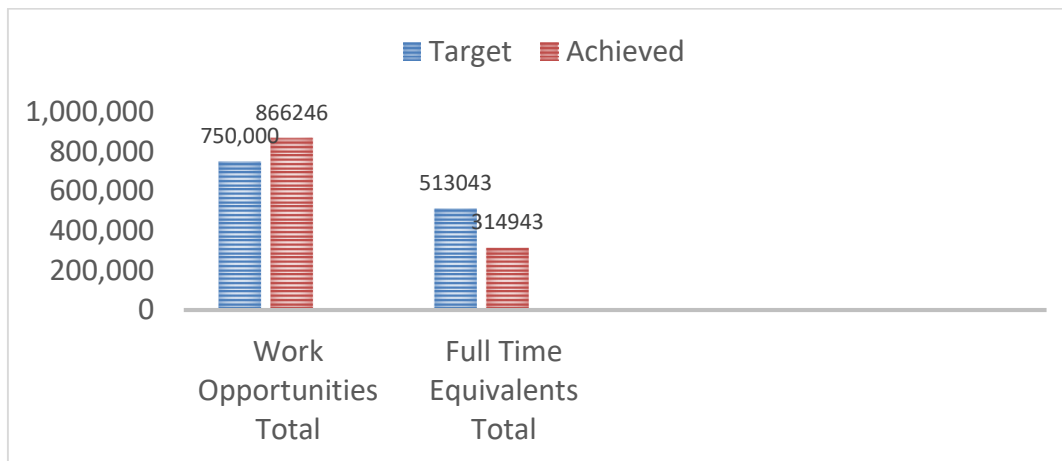
The poor redistributive outcomes are compounded by serious underfunding and weak resourcing administration, with direct gendered effects. Payments made to NGOs or ECD centres are in many cases persistently late, creating enormous financial stress for the participants who sometimes have to wait months for their stipends (Vetten 2015b; EPRI 2015). This is probably the challenge with the most serious consequences in the EPWP-SS; in fact, the EPRI (2015:98) evaluation of the EPWP-SS noted that “the widespread persistence of late stipend payments must be treated as a crisis and the causes of problems urgently identified and addressed”. Administrative failures place enormous financial stress on poor households when stipends are paid late. Precisely because the sector participants are largely female, the major implementation problems disproportionately affect women and the families they support. The knock-on effect on service delivery is negative as late stipend payment demotivates participants, and encourages work absences. Similarly, NGOs are regularly not given sufficient notice about future funding, and in some astonishing cases are even unsure about whether their transfer agreement with provisional government will continue well into the financial year (EPRI 2015). This results in a perpetual state of uncertainty, leading to institutional insecurity which has knock-on effects for participants. These and other widely reported administration problems are a critical weakness in the EPWP-SS<sup>20</sup>.

EPWP-SS impacts on social sector labour markets are not clear. Participant and programme numbers are expanding. Work opportunities is the indicator used as the primary form of self-measurement in the EPWP, and the social sector has created work opportunities for 176,000 in phase 1 and 866,000 in Phase II (EPRI 2015). These numbers demonstrate that the EPWP-SS exceeded its Phase II target of 750,000. There was an underperformance of the number of these work opportunities that were full-time equivalents (FTEs): 314,943 of a target of 513,043. These figures are shown in Figure 1 below:

<sup>19</sup> Authors' calculations. The estimate is calculated on days in the month, not working days.

<sup>20</sup> EPRI 2015; Vaughan 2016; Vetten 2015b

**Figure 1. Work Opportunities and Full-Time Equivalents of the EPWP-SS (Phase II, 2004-2009)**



Source: (EPRI 2015:66-67)

While the performance in terms of total work opportunities is positive, the numbers have been controversial, due to measurement and reporting challenges and suspected substitution and relabeling, which mean it is not possible to attribute these participation increases to the actual creation of new job opportunities in this field. However, there is a clear growth in the numbers of programmes that are taking part, and the number of participants being offered work opportunities.

The EPWP-SS provides training that is better than other areas of the EPWP due to its work-aligned content and, in the ECD sector, short duration and easily accessible qualifications which can be combined later for more formal qualifications, and this has intrinsic value for those who take part. However, the sector does not have a surplus of market-funded jobs largely due to the serious structural unemployment in South Africa, and so despite good training, participant employability remains disappointing. The training delivered via the EPWP-SS, however, is commendable because it has moved beyond the widely criticized job-unspecific life-skills training that was offered to all EPWP participants in Phase I (Vaughan 2016). Currently, the most focused job training across the EPWP is in the area of ECD, as participants can achieve accredited modules towards a formal qualification of ECD practitioner and there has been concerted upskilling of current ECD practitioners (Parenzee 2015). The training is thus well-aligned with their work requirements, which is a big improvement on Phase I (EPRI 2015). Participants have themselves indicated they value the ECD training (EPRI 2015). However, the number of training opportunities provided in the EPWP-SS were only 60 percent of the projected targets (EPRI 2015).

While training in the EPWP-SS has improved and is well-matched to work actually undertaken in this sector, the likelihood of finding secure, decently paid employment post-EPWP-SS participation is slim (van der Westhuizen 2015). This is due to the over-supply of similarly trained workers in an underfunded field with few vacancies, a challenge that all sectors of the EPWP face but has been particularly noted in the ECD sector<sup>21</sup>. Even where employment is found, the insecure working conditions and low wages on the open labour market in the ECD, HCBC and other social sector fields,

<sup>21</sup> Butler and Cartwright 2016; Atkinson and Ingle 2016; Parenzee 2015

almost guarantee that those working join the ranks of the working poor (Vetten 2016; Devereux 2002). There are few existing care organizations in rural areas, where the needs are greatest and where there is a huge lack of employment opportunities for women (Jacobs et al. 2010).

With regard to cross-policy linkages, a significant gap in the policy framework is that while the ministerial determination indicates that EPWP workers are eligible for unemployment insurance, it does not say who is expected to pay the UIF contributions (EPRI 2015; Mvelase 2013). Thus, the responsibility falls between the NGO employing the participant as an EPWP worker, and the state as the provider of the stipend. In 2015, the rate of compliance with UIF was still estimated at only 50 percent (Butler and Cartwright 2016). The implication is that the UIF, which could provide an important safety net (though limited by the low stipend levels) for those exiting EPWP participants, cannot be accessed as no contributions have been made. Remarkably little has been said about this in civil society or research reports on the EPWP. EPWP workers are eligible for public health services and state Old Age Grants, but do not unlock any additional health or pension social insurance possibilities via their participation in the public works programme.

In summary, despite the scaling up of the EPWP since Phase I, the current supply-driven design cannot offer income support to all the unemployment adults who need it, largely due to serious structural unemployment nation-wide. Owing to low rates of employment post-participation, the EPWP is functioning more like a social assistance programme and less as an active labour market policy, as it does not significantly improve participants' labour market prospects (Meth 2011). Some criticize the labour distortion that public works programmes unwittingly create (Olivier et al. 2003). The particularities of the EPWP-SS mean that heavily scaling up participation in order to substantially expand the reach of this social protection mechanism is not possible or desirable, and likely unethical. Therefore, the EPWP needs to be implemented in concert with other social protection mechanisms if the intention is to reach the majority of South Africa's working-age unemployed.

### ***6.3 Is the EPWP-SS transformative (for women)?***

The EPWP-SS is inherently gendered, as the care services it provides are traditionally located in women's sphere of activity. The participants themselves are primarily women, and the services to users mostly benefit women as they shoulder the burden of private and community care in the absence of public or publically subsidized care services (Razavi 2011). This case study has revealed that the conceptualization of ECD, HCBC, and other social services as a field for EPWP implementation was an innovative, synergistic idea. Yet, from a transformative perspective, both the design and the implementation of the EPWP-SS raise important concerns. The programme does increase the visibility of care work, performed largely by women. Improved and specific training do deliver symbolic benefits, as recognizing the care work skills required from EPWP-SS participants confers dignity and gravitas to a traditionally gendered and undervalued area of work. Changes in legislation have sought to define minimum stipends, working hours and leave days, though levels of compliance remain low (Vaughan 2016). The scaffolded professionalization of the care work skill set in ECD offers participants a sense of dignity and improved sense of self-worth (EPRI 2015), and is thus a small step towards transformative forms of social protection (Sabates-Wheeler and Roelen 2011). At the same time, however, by offering underpaid and temporary public works programmes instead of proper public employment, the approach can also institutionalize the undervaluation of care work. The disheartening redistribution

outcomes demonstrate that perhaps the negative effects have been accentuated (Section 6.2).

The breakdown of assumptions about gendered work and the improved valuing of this work could contribute significantly to greater gender equality. However, a potential strength of the sector—that it is already a female dominated sector and therefore inputs are assumed to accrue to women—is also a disadvantage from a gender transformative perspective as the deepening of caring skills will not challenge traditional gender relations. The lower stipends in sectors dominated by women suggest that just as care work, which is highly gendered, is considered of low value in the broader economy, so it is devalued and poorly recognized in the EPWP. This is often to do with the assumption that care work is unskilled and therefore women who perform it are unskilled, which is patently untrue if one thinks about the skill necessary to educate very young children or to deliver post-rape care counselling, for example<sup>22</sup>. If decent work opportunities existed in the care sector, it is plausible that even men would take them up, however the poor working conditions and remuneration levels have served to entrench women's exploitation.

The linking of job creation needs with service delivery needs is an innovative and commendable policy leap of faith, with great potential for an integrated approach to women's reproductive and productive roles. However, capacity and institutional problems in the coordinating departments and in the EPWP overall have seriously undermined the vision of good care services delivered by newly trained unemployed citizens. Previously mentioned challenges, especially in relation to funding and administration, have negative effects not only on the EPWP-SS participants, but on the communities they serve. A study on Thuthuzela Care Centres (TCC) for post-rape care identified major concerns in how DSD funds and manages NGO services, with serious negative consequences for service delivery (Vetten 2015a). As many TCCs employ EPWP participants to deliver care, this has implications for EPWP service delivery outcomes (Vetten 2016). As the main users of post-rape care services remain women, poor quality or limited services affect them most, just when they are most in need of care.

Another example, where gaps in implementing the social and economic goals of the programme have compromised the achievement of transformative outcomes, can be drawn from the ECD field. ECD services are not fully subsidized by the DBE. Current subsidies of ZAR 15 per child per month are too little to cover the costs of quality child care and education services, and therefore almost all ECD services involve user fees of between ZAR 50 and over ZAR 1,000 per month (Parenzee 2015). Services therefore exclude the poorest who cannot afford user fees. State social grants, such as the Child Support Grant, cross-subsidize education services, eroding the value of the grant for users (Parenzee 2015)<sup>23</sup>. In addition, the cheapest services offer the poorest quality (Parenzee 2015), ensuring that the poor have to make do with second-rate care services for their children. While ECD subsidies and other education policy and administrative decisions lie outside the ambit of the EPWP, structural and institutional challenges in the sector can, and do, undermine the achievement of quality delivery of EPWP social sector services. Again, as child care lies in the traditional domain of women, it is women and children who suffer most when faced with poor ECD services.

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<sup>22</sup> van der Westhuizen 2015; Vetten 2015b; Maphiri 2013

<sup>23</sup> However, the 2016 National Budget does commit to additional funds for ECD subsidies of 104,000 children and the support of maintenance costs for 4000 ECD centres (R.S.A. 2016c).

Overall, several design, institutional and implementation factors hinder the transformative potential of the EPWP-SS, particularly for women. The lack of synergy across interventions, and the underfunding of ECD services also limits the transformative potential of the EPWP-SS.

## 7. Conclusions

This paper offers a fresh look at gender and social protection in South Africa, through a social justice lens which views redistribution and recognition as needing to be present for justice to be fully realized. The analysis has particularly viewed care as crucial to social and economic development. We have specifically sought to see if social protection can play a role in reducing gender inequality in South Africa, where well-intentioned policies and laws promote gender equity in their own ways but social conditions, beliefs and practices still disadvantage women.

Three areas of social security are combined in an overall analysis: the Child Support Grant as an example of social assistance; the Unemployment Insurance Fund as an example of social insurance; and the EPWP social sector as an example of a public works programme. The case studies are quite disparate, but need to be understood as forming part of a larger framework of comprehensive social protection, which should ideally be informed by synergistic and complementary principles, designs and effects. The programmes have some similarities in that they are all based on trying to address poverty in pro-poor, redistributive ways that pay attention to the inequities of the past. Designs are very different, but all evidence innovative thinking and attempts to engage with gender inequality. Overall, the CSG does much better than the other instruments in relation to redistribution and transformative gender effects. However, the effects across the social security spectrum are disappointing, with limited achievements in the UIF and EPWP especially, although gendered redistribution is taking place in all cases. Social transformation is lagging behind, and the problems can be largely laid at the door of implementation inefficiencies and unresponsive institutions.

Table 3 summarises the findings regarding the extent to which social and economic outcomes of social security programmes are redistributive and transformative with regard to gender.

**Table 3. Gendered Redistributive and Transformative Outcomes of Social Security Instruments in South Africa**

	CSG	UIF	EPWP-SS
<i>Redistributive</i>			
<i>Access to social security</i>	<ul style="list-style-type: none"> <li>-98 percent caregiver recipients are women.</li> <li>-Gendered nature of care in South Africa explains why so few men access the CSG.</li> </ul>	<ul style="list-style-type: none"> <li>-Women underrepresented as contributors and claimants.</li> <li>-Extends access to domestic workers (mainly women).</li> <li>-Very low coverage of unemployed population.</li> </ul>	<ul style="list-style-type: none"> <li>-The majority of participants are women, service beneficiaries are also mainly women.</li> <li>-Data is very weak.</li> </ul>
<i>Poverty reduction—individual/household level</i>	<ul style="list-style-type: none"> <li>-Long-term human capital benefits in nutrition, health and education.</li> <li>-Low monetary value of the grant.</li> </ul>	<ul style="list-style-type: none"> <li>-Income smoothing during unemployment and financial crises for formal workers.</li> <li>-Progressive in design - lower earners get a higher proportion.</li> <li>-Administrative barriers</li> </ul>	<ul style="list-style-type: none"> <li>-Low stipends and late payments are common and place enormous financial stress on poor women's households.</li> <li>-Positive impacts for duration of programme, but lack of evidence of</li> </ul>

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		and delayed payments of maternity benefits limit impact for women.	sustained impacts.
<i>Poverty Reduction—macro level</i>	-Strong evidence that the CSG reduces income poverty (nationally) and contributes to inequality reduction. -Impacts are greatest in very poor and female-headed households.	-Lack of evidence. -Huge accumulated surplus of ZAR 90 billion.	-Lack of evidence.
<i>Access to labour markets</i>	-Moderate evidence that the CSG supports job-seeking behaviour (for example, transport and childcare costs).	-Very small impact through job protection programmes, falls far short of programme's potential.	-Only for duration of programme. -Post-participation employability is low. -Social sector labour markets impacted negatively (precarity) and questionable creation of new job opportunities. -Weak monitoring and outcomes data. -Training is work-aligned and can lead to qualifications.
<i>Access to other interventions</i>	Linkages are weak.	No evidence of strategic linkages.	Intended linkages are not realized.
<b>Transformative</b>			
<i>Recognition of women</i>	-Women feel validated in their personal, caring and social roles. -Negative discourses about grant misuse, fertility and dependency directed at women. -Men experience social barriers to receiving the CSG.	-UIF provisions not sufficient to overcome poor recognition of domestic workers.	-Recognition of the value of women's care responsibilities.
<i>Recognition of care</i>	-Recognizes the value of the caring tasks of women. -It reinforces caring as a gendered activity, and caring remains unpaid and still often invisible.	-Legislated provision of maternity recognizes value of care. -Inclusion of domestic workers—recognizing a traditional area of care work as work.	-SS as a field for EPWP implementation is a novel idea. -Low stipends undermine value of care.
<i>Gender relations</i>	-Childcare responsibilities are redistributed between women (to some extent inter-generationally) not between genders or onto the state. -Greater level of financial independence for women over CSG resources.	-Lack of evidence.	-Does not challenge the gendered nature of care work in South Africa.
<i>Integrated approach to productive/reproductive roles</i>	-Both roles are supported but not integrated. -Gendered divisions of labour are not challenged.	-Provision of maternity recognizes needs of working mothers but weakly supported in practice. -Does not challenge work culture that discriminates against women.	-The potential for harmonizing productive and reproductive roles through supply/demand aspects of programme (for example, provision of childcare through paid employment for women) is not realized.

Although there is considerable variation in the gender-related design features of social protection programmes, all programmes have had intended and unintended effects on women and gender relations. In terms of access, the vast majority of CSG recipients are female, and research is being conducted to understand barriers to male access. Women are underrepresented in the UIF, given its primary focus on formal labour markets and limited expansion into temporary and informal labour markets where the majority of women are located. Yet extensions to domestic workers and provisions for maternity benefits do benefit women to some extent. The EPWP-SS successfully targets women, however, weak monitoring systems make it difficult to attribute exact figures to the actual creation of new job opportunities for women.

The CSG is the only one of the social instruments surveyed operating at a scale to have discernible impacts at a national scale. A substantial body of quantitative and qualitative evidence demonstrates that despite its small amount, it achieves significant poverty reduction outcomes, and is an important contributor to redistributive tax-based social policy. Poor women have especially benefited in the short and long term, and the gender poverty gap has been reduced but not overcome. The poverty alleviation mandate of the UIF has been pursued within narrow and conventional boundaries, by smoothing incomes and alleviating some of the social and economic costs of cyclical (rather than structural) unemployment, while accruing a large financial surplus. By targeting people living in poverty including women, youth and people with disabilities, there is preliminary evidence that the EPWP-SS stipend has provided some poverty relief to participant households, however, low stipends, the temporary nature of work and administrative failures have limited these effects.

The EPWP-SS is the only programme intentionally designed to improve access to labour markets. It is difficult to estimate real impacts due to weak monitoring and outcomes data, but available evidence shows that training is work-aligned and can lead to qualifications. The low post-participation employment rate is an additional problem. The evidence highlights a mismatch between supply and demand in the early childhood development sector that limits post-programme absorption into the underfunded ECD labour markets. While evidence is mixed and effects are small, there is some indication that the CSG is associated with job-seeking behaviour, particularly by subsidizing childcare costs. The UIF does fund programmes to support job protection but its role in improving access to labour markets is largely underdeveloped.

From a transformative perspective, all three programmes contribute to the recognition of women and of care in several ways. The CSG supports women and children's well-being, and a greater level of financial independence for women. The UIF acknowledges the needs of working mothers and the EPWP-SS seeks to professionalize care work skills. Yet, in the case of the UIF and the EPWP-SS, administrative issues have stunted their potential to deliver transformative social protection in relation to gender. Overall, in the social security system gendered divisions of labour are not challenged, and where evidence is available, there is little indication of a shift in gender relations power dynamics. While the social security programmes have demonstrated important material relief for households, and provided increased opportunities for women to engage in economic activities, improved confidence, and skills, these mechanisms have largely reinforced rather than relieved women's social reproductive responsibilities and buttressed assumptions about the type of work (and remuneration levels) appropriate for women in the labour market. The analysis has highlighted the structural and cultural challenges to redistributing care responsibilities in more equitable ways. Across the board, the surveyed social security instruments have struggled to help women overcome

the challenges they face in bridging their double roles of poorly rewarded carers and productive economic agents.

Lastly, Table 3 highlights that linkages between social security instruments and with other redistributive interventions are weak, in ways that disadvantage women especially. Within a comprehensive social security framework, each programme would act as a component of a system that supports women across lifecycle stages (childhood, job-seeking, employment, pregnancy, child-bearing and child-rearing, retirement); across multiple roles (productive and reproductive) and across employment status (unemployed, informal sectors, formal sectors, full-time/part-time). However, as the paper has shown, each programme has developed within distinct and poorly aligned structures. Linkages such as access to the UIF for EPWP-SS beneficiaries are weakly complied with. Despite evidence that the CSG can assist with job searches, there are no formalized linkages between the CSG and the EPWP programmes. The lack of design and implementation synergies has detracted from the achievement of gender transformative outcomes.

We conclude with a reflection on whether these interventions add up to a new direction in social security for women in South Africa, and what lessons can be learned that are relevant to other low and middle-income countries. First, we note that social assistance has had a significant redistributive effect, with high returns to investment that has helped to narrow the gender poverty gap. The sustained and well documented impacts of the CSG over two decades are testament to the role that a relatively small, well targeted transfer, incrementally expanded and now delivered at scale, has played in reducing the effects of poverty and unemployment, especially for women.

In a context of stagnated economic and employment growth, which significantly disadvantages women, the South African case study shows that the extension of insurance and public employment are both important though complex social protection options that require careful consideration and innovation, in order to move beyond “business as usual” towards redistribution and transformation. The case studies do suggest a “new direction” in relation to the overall framework and design, tending towards more gender-sensitive policies. The instruments have potential but face enormous challenges in their realization. In a global context, social insurance in South Africa remains rigid and underdeveloped, compared to many northern welfare states where social insurance dominates the social security landscape. Public employment programmes have been considerably scaled up and have the potential to inject small amount into large numbers of poor households, with redistributive effects. However, institutional structures, administrative weaknesses and weak monitoring systems have limited their ability to produce and conclusively show positive outcomes for women. Research funding and advocacy to inform further analysis are needed to bring a social justice and gender-sensitive lens to the analysis of under-reported social security instruments.

As the nature of work is in flux globally, the findings support the global shifts in policy thinking towards understanding how social and economic policies might work together to achieve more gender equitable outcomes. Synergies are the issue in order to overcome system failures, structural unemployment of women and provision for childcare. Linkages between social assistance, social insurance, public employment schemes and access to good quality education and healthcare, are critical for establishing a continuum of short-term to long-term impacts for women. The state has



made significant progress in the provision of infrastructure support through the delivery of basic services such as water, electricity, sanitation, and housing, and these services do indeed relieve the burden of care on women, not all areas are being serviced to the same standard. Also, further innovative solutions might be found in providing other services that have care implications, such as transport costs to schools and health clinics. Further research can help further enhance these outcomes by gaining a deeper understanding into men's involvement towards shifting gender relations and social norms in the direction of gender equality, and into understanding what are the best combinations and programme linkages that can produce multiplier effects in terms of achieving comprehensive social protection across men and women's lifecycle.

Lastly, our study reaffirms that without gender justice, social justice in social security cannot be achieved. The gender lens across the design, implementation and evaluation of social security interventions is critical for understanding redistributive and transformative outcomes. Gender issues in social welfare and development need to be made more visible and acknowledged in social policies, as they have real impacts on people's lives.

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