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**The Political and Social Economy of Care:  
South Africa Research Report 1**

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# **SOUTH AFRICA: Setting the context**

## **1. Introduction**

In 1994 formal apartheid ended and South Africa moved towards a democratic political system. The country has a population of some 48 million, of whom just over half live in rural areas. The present per capita gross domestic product (GDP) of R38,622 puts South Africa in the category of middle income country. Political settlement has bought the dividend of political peace, and slow but now steady economic growth – with GDP annual growth increasing from 2.4 per cent in 2002 to 4.6 per cent in 2006.

Internationally South Africa re-engaged globally on both economic and political terrains. It has been actively involved in negotiations around international terms of trade and has come to occupy a leadership role in the World Trade Organisation. At the regional political level it took a leadership role in the establishment of the New Partnership for Africa's Development (NEPAD), and has forged a continent-wide peace-keeping role.

Within the country, extremes of poverty and inequality, one of the stark legacies of apartheid, remain and are still largely racially patterned. Since 1994, there have been substantial reforms (some of which began prior to 1994) across all sectors, involving changes both in policies and in the institutions for their delivery. Most of the reforms have direct or indirect effects on gendered relations and institutions. They also have implications, as we shall see, for who is responsible for paid and unpaid care work, and at what cost the caring is undertaken.

We start the report with a brief overview of apartheid and its legacy, and the main features of political transformation, followed by an overview of changes in the economic policy sphere, and in the labour market. We then summarise past and present patterns of inequality, including comments about the reliability of various sources of socio-economic data. The section on social policy considers the extent to which South Africa, with its unique contemporary history of racial capitalism, can be accommodated within typologies of welfare regimes. We present patterns on government spending over the last decade, and then outline some of the social policies that have been introduced just prior to and since the change to democracy.

The penultimate section presents socio-demographic characteristics of South Africa, all within the context of the HIV/ AIDS pandemic. For each theme – inter alia the situation of children, marriage, fertility, mortality, household composition, education – we draw out the implications for care work, in this society in which the AIDS pandemic is an additional assault on a society already riven with somewhat unique characteristics.

## **2. Political transformation**

### **Apartheid and its legacy**

Apartheid – ‘separateness’ in Afrikaans – was a system of legislated racial discrimination designed to ensure white domination. Political, economic and social policies discriminated against all black people, but also differentially within the three classified ‘non-white’ groups – African, coloured

(mixed race) and Indian people. The most obvious outcome has been strongly racialised patterns of poverty and inequality.

Apartheid followed the coming to power in 1948 of the Nationalist Party. The new government formalized and made more comprehensive the racist policies of the British colonial government and then the union government over the previous century – policies which among other things had deprived the black population of access to land, the labour market and decent education, and which had disrupted family life. During the 1950s the apartheid government consolidated these policies, and then introduced a new array of laws which forced racial separation and difference in every aspect of life – from the prohibition of sexual relations between people of different colour, to different education curricula, different standards of health and welfare services, and different recreation areas. In each case, the provisions for black people were inferior to those for white. Racially segregated residential areas were further enforced, and the government then moved to create entirely separate pieces of the country as ‘independent states’ for different African ethnic groups, in the pursuance of the goal of a South Africa without Africans, under the guise of ‘multi-nationalism’. Four such states were created (Bophuthatswana, Ciskei, Transkei and Venda) and a further six ‘self-governing territories’ created which were intended to achieve independent status. These Bantustans were generally in remote and peripheral areas, both geographically and in terms of economic viability; the areas they encompassed still carry the major burden of poverty and exclusion today.

Resistance to colonial policies had started early in the twentieth century, but soon after the 1948 transition to apartheid, the Freedom Charter of 1955, which remains a reference point for many today, expressed the aspirations of the majority of South Africans for a non-racial and free South Africa. During the 1960s and 1970s, the state’s brutal acts of oppression forced the two main black political organisations, the African National Congress and Pan African Congress, into exile. The Durban strikes of 1973, followed by the student uprising in 1976, marked the beginning of the end of apartheid, with the strengthening internally of the popular resistance movement. The state devised a twin strategy of ‘reform and repression’, in which turbulence in the black townships was to be addressed by both the introduction of better infrastructure and services (including in health and welfare) and, simultaneously, a comprehensive apparatus of repression, including the imposition of two states of emergency in the mid-1980s. In the background, however, the government as early as 1988 was also writing interim constitutions and starting to prepare for the re-integration of the bantustan areas into a unified South Africa.

One of the many instruments of political domination during the apartheid era was the control and manipulation of official statistics. The official statistical agency had little legitimacy outside of government circles, and this central body also lost or relinquished control of and responsibility for data collection in the bantustan areas, more particularly in the ‘independent states’. The effects of this will be seen throughout this report, as will the importance of the benchmark 1993 Project on the Study of Living Standards and Development (PSLSD), which was the first serious attempt to conduct a nationally representative household survey covering the full area of the ‘new’ South Africa which was then in the making.

The struggle against apartheid repression itself threw up specific processes that are pertinent to this study. During the 1970s and 1980s, the government acted harshly to control the activities of civil society organizations in general. Organised labour under the umbrella of the Congress of South African Trade Unions (COSATU) from the mid-1980s, was a key agent in the struggle, and was an important actor in the negotiations for the political settlement. Some COSATU unions organized specifically around social wage issues, including, for example, paternity leave and child care. The women’s movement became an active champion of women’s rights, and through the ANC Women’s League started organizing for a quota for women in parliament. And from around 1990 in

the different social sectors, progressive organizations engaged in policy reform at a national level in economic and social sectors, to operationalise the vision of what a new South Africa would offer in, inter alia, land reform, housing, education, health and welfare.

### **Major political changes**

In 1994, the ANC joined with COSATU and the South African Community Party to form the tripartite alliance which won the elections, with a clear majority in seven of the nine newly formed provinces. The ANC Women's League had campaigned for a quota of women (33.3 percent) on electoral lists, and indeed nearly a third of the new parliamentarians in 1994 were women. Today South Africa ranks third in the world for the numbers of women in parliament, and a number of the executive posts (ministers and deputy ministers) are held by women, including in 'hard' portfolios such as minerals and energy. Since mid-2006, a woman has occupied the position of Deputy President.

The 1997 Constitution is held to be one of the most progressive in the world. It proclaims that there will be no discrimination on grounds of race, gender, marital status, ethnic origin, sexual orientation, age, disability, or culture. It includes a wide range of socio-economic rights, including the right to a healthy environment, access to land, education, health care services, sufficient food and water, social security, and the right not to be refused emergency medical treatment. It is based on the notion of substantive equality (equality of outcome), rather than simply formal equality (equality of opportunity).

The Constitutional Court was set up to deal judicially with constitutional issues, and a number of supportive but autonomous institutions were set up through the constitution to protect the new democracy. These include the Human Rights Commission, the National Youth Commission, the Commission to Protect the Rights of Cultural, Religious and Linguistic Communities, the Independent Electoral Commission, and the Independent Communications Authority. The Commission on Gender Equality (CGE) was one of these, and was accompanied by the establishment of other structures and agencies for the promotion of the rights of women, including the Office on the Status of Women (OSW), and the introduction of gender desks in government departments. These bodies faced similar challenges to those in many other countries in terms of limited authority and effectiveness.

While there were advances in setting up institutions to promote and protect women's interests, the interests of that most patriarchal of institutions, the traditional authorities (the 'tribal chiefs'), were being incorporated at national, provincial and local levels. A few women had historically been chiefs, and in the current structures space is made for a quota of women on traditional councils. However these are not elected bodies, and the traditional courts still tend to deny the right of women to be allocated land, even though this is unconstitutional (Hassim 2006: 202 – 208).

A major political achievement was the unification of the fragmented apartheid administrations into a consolidated unitary South Africa, including the creation of the nine new provinces, as well as new local government jurisdictions. This was vital not least for the delivery of social services such as education, health and welfare. In the case of welfare it involved bringing together seventeen separate 'national' welfare administrations.

At national level, new policies were targeted at poorer South Africans – free schooling for those who could not afford fees, a free primary school nutrition programme, free primary health care (though major elements of this had been in place before the transition), a housing subsidy for first-time home owners, and the extension of some aspects of social security. All of these had obvious and direct gendered implications for paid and unpaid care work. They are summarised below in Section 5, and will be the focus of greater attention in later research reports.

Especially at the level of reform of institutions of governance, remarkable gains have been made in the post-apartheid period. Government's most signal failure has been its dealing with the HIV/AIDS pandemic which preceded and then largely coincided with the transition to democracy. HIV/AIDS, and the impact on paid and unpaid care work, will be a key focus of the South African component of this UNRISD project.

### **3. Economic policy and employment**

#### **Transition in economic policy**

Many developing countries, in a time of significant political transformation (for example moving towards independence, or towards democracy) spell out their policies in five-year or ten-year comprehensive development plans. South Africa does not currently have a comprehensive development policy, although it has over recent years had several macro-economic and related policies that address issues of economic growth and structure to a greater or lesser extent.

The Reconstruction and Development Programme (RDP) first appeared in 1992 and formed the basis of the government-in-waiting's election manifesto and plans for development in the new South Africa. It was a wide-ranging multi-sectoral policy with a strong emphasis on redistribution and redress of apartheid inequalities. It was very shortly displaced by the Growth, Employment and Redistribution (GEAR) policy of 1996. Despite the three nouns in its name, the main focus of GEAR was on economic growth, with the expectation that this would bring with it increased employment and the ability to redistribute. A reduced deficit and a reduction in the inflation rate were seen as necessary factors to generate growth. Its explicit reduction targets, designed also to please financial markets and domestic and international capital, were successfully met such that in 2006/07 the government budget had a small surplus; inflation targets within the range of 3-6 per cent were also rapidly met.

These changes did not, however, result in the expected economic growth nearly as quickly or efficiently as the GEAR model predicted. In addition, the growth that occurred went together with losses in employment in the early years, and employment growth well below the increase in labour force age population in subsequent years. This has been significant in the growing tensions between the ANC and the COSATU, setting the scene for social policy debates over for example the basic income grant.

The rapid move towards policies favoured by the Bretton Woods institutions, without undue pressure from those institutions, caused controversy and criticism. GEAR was criticised from the left for being a structural adjustment programme. There were certainly many features that it shared with such programmes. There were, however, also differences. In particular, social sector spending did not decrease during these years, although it did not increase to the extent that it might have done without GEAR. Also, commitment to the land reform programme has endured though it has been slow in implementation.

In 2004 the Ten Year Presidential Review assessed progress in the implementation of government programmes since 1994, from the perspective of the President's Office and its advisers. The outcome of the review was what appears to be a shift towards sharing the country's wealth more equitably – the changed approach was characterised by supporters as 'Now the macro economic fundamentals are in place, we can turn our attention to redistributive issues'. In 2005, however, the 'new' Accelerated and Shared Growth Initiative for South Africa (ASGISA) economic policy again focused primarily on economic growth, although the "shared" in the title is intended to signal that the benefits should be distributed to all sectors of the population. ASGISA is portrayed as the means for halving unemployment and poverty by 2014 in line with Millennium Development Goals.

ASGISA has been seen by some commentators (see, for example, Southall, 2006) as reflecting a shift in government towards support for a developmental state in the place of the more “laissez-faire” approach adopted previously. Nevertheless, the government itself acknowledges that ASGISA is not a comprehensive development plan, but instead a range of interventions – many of them existing before 2005 – seen as likely to stimulate growth.

The policy stance of those in power towards the informal economy is important for this project, in so far as informal employment is a survival strategy for many poor people, especially women, and also enables many to reconcile the need for both incomes and to engage in unpaid care work. The conceptualization of ‘the second economy’ emerged from within the President’s Office at about the same time as ASGISA. It is nowhere clearly defined, but seems to be understood by politicians to include the informal sector, the unemployed, and domestic workers. Devey et al (2006b) note that the dualistic view of the economy implied by the term second economy allows government to state that its economic policies have been successful for the first economy, even if not for the second. The authors argue that this view is blind to the strong linkages between the two economies. Furthermore, institutionally there is a fundamental flaw: the first economy is dealt with by the Office of the President, the Department of Trade and Industry and related mainstream institutions, while the second economy was initially defined as a welfare issue, under the Vice President. This is telling evidence of the problematic nature of the dualist conception of the economy, and the relegation of the informal economy to being a social rather than economic policy issue.

Measures seen as addressing the needs of the second economy include, among others, the Expanded Public Works Programme, skills training initiatives, lessened regulation in respect of small businesses, and black economic empowerment initiatives. This mix of very different initiatives, which between them have very different targets, reinforces the conclusion that the second economy is a loose and ill-defined concept.

### **Characteristics of the labour force**

Apartheid is commonly interpreted as a largely political programme of domination. However, to achieve apartheid’s political ends of racial segregation, draconian restrictions were placed on where and how people could work, and where they could live. One outcome has been enduring distortions to a ‘normal’ labour market, such that some analysts believe it should be treated as a special and non-generalisable case. Here we present data on the labour market, disaggregated by race and sex, in terms of trends in employment and unemployment patterns. As in other areas, there are no reliable statistics on the labour force in the country as a whole for the period before the early 1990s. Generating trends in respect of labour force statistics is difficult even for the period post-1994 due to significant changes in the household survey instruments, as well as in training of fieldworkers.

Even for those areas that were covered by the statistics of the area which excluded the “independent homelands”, there were serious problems with the counting of the work of African women, in particular. For example, from 1970 onwards, women in subsistence agriculture – the majority of whom would have been African – were classified as economically inactive. After correcting for this bias, women were estimated to make up about half (50.4 per cent) of the labour force in 1991 as against 39.6 per cent using the gender-blind measure, and 44.9 per cent using the measure which included subsistence agriculture in 1980 (Government of South Africa, 1995: 36). What these imperfect statistics do show is that women’s labour force engagement was significant, and increased markedly in the decades leading up to the first democratic elections.

In 2006, nearly two thirds (64.2 per cent) of the male and just over half (51.4 percent) of the female population between 15 and 64 years of age were recorded as being economically active. Economic activity does not, however, necessarily mean that a person has work i.e. is employed. South Africa’s labour force is characterised by extremely high unemployment rates. A distinction can usefully be

made between the narrow or strict definition of unemployment, and the broader, or expanded, definition. The narrow definition, which is currently South Africa's official definition, classifies someone as unemployed only if they have taken active steps in recent weeks to find work. The expanded definition also includes those who would prefer to work but are not actively seeking work because they have given up hope of finding it. These papers are sometimes referred to as 'discouraged' workers.

The 1993 PSLSD survey reported unemployment rates of 14.7 per cent for women and 11.5 per cent overall using the strict definition which disregards "discouraged" workers (Government of South Africa, 1995: 20). The rate ranged from 17.9 per cent for African women to 3.9 per cent for white women. Current unemployment rates are significantly higher than this, despite a slight decrease over the last few years. Thus, in September 2006 the female unemployment rate was 30.7 per cent, compared to 21.2 per cent for men. The unemployment rate for African women was 36.4 per cent (Statistics South Africa, 2007: iv; xviii), compared to 25.3 per cent for African men. In regional and international comparative terms, Bhorat and Kanbur (2007, citing figures from Altman, 2007), argue that South Africa is an outlier when compared to other regions (unemployment rates of 9.8 per cent for Latin America and 7.1 per cent for South East Asia, for example), but not in relation to Southern Africa (at 31.6 per cent).

Much of the debate about the extent of unemployment revolves around what counts as employment, and the invisibility of very small economic activities in the informal economy. Budlender et al (2001) undertook the first serious attempt to measure the size, development and characteristics of the informal sector and informal economy in the post-1994 period. The analysis is based primarily on the labour force survey of September 2000, and thus coincides with the time use survey data.

Among the relevant characteristics described are the following:

- ♀ In urban areas, 66 per cent of the population is of working age (15-65 years), as compared to only 55 per cent in rural areas. This difference reflects, among others, migration of rural working age people to urban areas in search of jobs, leaving the older generation (and grandmothers in particular) to care for children.
- ♀ Half of the male working age population is employed, compared to 38 per cent of working age women. This reflects both smaller numbers of women making themselves available for economic work, and a lower rate of unemployment for men than women. In urban areas, 48 per cent of working age people are employed, compared to 37 per cent in rural areas.
- ♀ 84 per cent of employed people in urban areas and 64 per cent in rural areas are employees, and 15 and 34 per cent respectively self-employed. There are relatively few people employed as unpaid family workers, but the majority of them are women.
- ♀ A large proportion of informal sector consists of trade activities once one has included domestic workers.

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