Introduction

I am honoured to deliver the Walter Friedlander Memorial lecture this year on two accounts. First, it is a great privilege for me to be here and to honour the life and work of Walter Friedlander in the field of international social welfare.

And second, my lecture this evening is also dedicated to James Midgley who has provided guidance and support to my colleagues and me for close to twenty five years. James’s earlier work on social welfare in developing countries shaped my own work on the search for welfare policy alternatives that could break with the dominant colonial and apartheid models of social welfare in South Africa. These were among others: *Professional Imperialism in Social Work in the Third World* (1981); *Social Policy for Development* (1984); a co-authored book with Stewart MacPherson on *Comparative Social Policy and the Third World* (1987); and his seminal books on *Social Development: The Developmental Perspective in Social Welfare* (1995) and its sequel *Social Development: Theory and Practice* (2014).

James Midgley produced a body of work over more than three decades that is unsurpassed in the field of international social welfare. Although his work is relevant to the search for welfare alternatives in both the North and the South, he has drawn international attention to the richness and nuanced ways in which people meet their needs in developing countries thereby challenging dominant northern welfare regime analyses. These ideas have been taken up directly and indirectly in international social welfare theory, policy and practice in different country contexts through his students and international faculty exchanges. Most notably the International Association of Schools of Social Work endorsed the developmental approach to social welfare at its conference in 2014. Additionally, a growing and influential body of contemporary scholarship on social security/social protection on the reduction of poverty and inequality have shaped the global agenda particularly, the UN Sustainable Development Goals (SDGs) and the ILO’s Social Protection Floor initiative. I have no doubt that James’ extensive intellectual work in this field over many years held sway in some way.

I wish you well in your work and look forward to our continued collaboration in the years to come.

Thank you to the Dean, Professor Jeffrey Edleson and the School of Social Welfare for the opportunity to address you today.

I selected a topic that remains under-developed in developmental social welfare theory and policy thinking in the Global South, although it is increasingly receiving attention in the North. While gender equality features in various United Nations platforms of action including the UN Millennium Development Goals, these instruments have been criticised for its narrow focus on health and education outcomes for women and girls but is silent on the
unpaid care work of women in social and economic development. The 2015 SDGs do however give greater weight to gender equality, but how countries will execute the SDGs remains a key challenge. The paths of welfare policies, economic and gender equality policies seldom cross. This may be because scholars and practitioners come from different disciplines, professions and theoretical perspectives. There is need for greater integration of these differing ‘scholarships’ along the lines of what Boyer (1991) refers to as a scholarship of integration and application. Country specific conditions do matter in view of their different historical, cultural, political and socio-economic conditions.

The outcome of this bifurcation of knowledge domains has resulted in the gendered nature of social welfare theories and policies remaining hidden, invisible and taken for granted particularly in development contexts. However, it is therefore timely to call attention to some of these issues to inform dialogue and debate on how we might think about a more gender-sensitive and equitable welfare agenda in the South.

The South African case is useful for this purpose as it is one of the few countries that has explicitly adopted the developmental approach to social welfare. I have selected three themes for the purpose of the lecture to hone in on the key issues that may be relevant to other countries. The first theme is on gender and care in SA’s welfare regime. A second theme turns to gender issues in social protection while the third theme relates to gender and the current debate on minimum wages. Finally, I make a few closing remarks about the overall direction of gender trends in social welfare policy and about human agency and particularly in relation to women’s agency in shaping welfare policy reforms.

**Theme 1: Gender and Care in South Africa’s welfare regime**

The White Paper for Welfare (WP) was adopted in 1997 as the policy framework guiding developmental social welfare in South Africa. The WP is currently under review and there is therefore scope to engage with these ideas. South Africa’s welfare policy approach can briefly be summarised as first, being rights based with a strong focus on social and gender justice. The Constitution upholds the right to equality and guarantees the socio-economic rights of all citizens. Citizen participation in development, a mixed economy of social welfare with a proactive role for the state in development, are two other key tenets of the policy. Welfare pluralism based on a collaborative partnership between state, corporate social responsibility, not-for-profit welfare, community and faith-based organisations are the main providers of care services along with individuals, families and community level social networks. Lastly, the integration of social and economic policies is a further feature of the system and in theory it is supposed to shape the design, implementation and evaluation of policy outcomes. While much progress has been made in dismantling apartheid welfare policies and in adopting new macro social policies with high impacts, shortfalls exist in the execution of this ambitious policy agenda (Patel 2015).

But, the White Paper was justifiably criticised for not locating care within a social rights framework – that is, the right to receive and give care and to be supported by various actors including the state in meeting care needs in different phases of the life cycle (Sevenhuijsen et al. 2003). In essence, care is a universal aspect of social life. It is also central to the reproduction of human and community life, to productive activity and economic and social development (UNRISD 2010). These two processes are therefore intertwined. There has been a shift in social policy thinking by feminists away from an emphasis only on
discrimination towards the more equal distribution of care responsibilities in the family and to more state support for childcare and for family and household level care services (Folbre 2008).

While welfare policy almost two decades ago advocated the building of a caring society and the achievement of gender equality in all spheres of social, economic and civic life, its concern was largely with the meeting of women’s needs and rights, on reducing discrimination, violence against women, poverty and in meeting women’s needs as caregivers. The White Paper did call for gender-sensitive welfare policies though, but it provided little detail on how this might be achieved. Little was said about men in developmental welfare although shared responsibilities between men and women in the domestic sphere and in other areas of social and economic life was proposed. In relation to care, the policy states explicitly in section 88 that the care giving roles of women in the family, for the sick and elderly, for those with physical and mental disabilities, in communities as volunteers, remains invisible to social planners and policy makers. It alludes to the contribution of women, who are the primary carers in most instances, to social reproduction (Department of Welfare and Population Development 1997).

Internationally, analyses and classifications of welfare regimes have been censured for being gender blind and for not recognising how the unpaid care work of women contributes to economic and social development. Feminist authors have shown how the burden of care borne largely by women reinforces gender inequality and limits women’s full participation in social life. These realities remain concealed and needs to be foregrounded in any discussion of future welfare policy in South Africa (Reddy et al. 2014; Meyiwa 2014).

I would like to unpack this a little more by explaining some of the key concepts and how these ideas actually work in practice. Much has been achieved in social policy and legislation with respect to gender equality which is well documented. Recent policy on Early Childhood Development also places child care issues on the national agenda. It is not my intention to diminish any of these achievements. I want to draw attention to the gaps and what we may learn from this as we look ahead.

So, let me begin with the question of what is care work? It involves the provision of physical care e.g. house work such as cleaning, feeding, bathing a person – e.g. a child or a sick person and watching over them. It is also about providing emotional care and social support (Razavi 2014). We have all benefited from care at different times and stages in our lives. The intensity and the nature of care may vary such as in the case of new born babies and depending on the needs of the persons concerned or the availability of care services in the home and the community. A lack of access to basic services such as water, sanitation, electricity and transport can increase the time and physical work of caring. These factors 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. Usually, there is a primary carer who takes responsibility for caring. Such a person is often not able to be employed; she may experience social isolation, expend emotional resources and may forfeit opportunities for education, engagement in livelihood activities and wider social participation. Often, self-care is compromised of the care giver (UNRISD 2010).

The simple truth is that much of care work is unpaid and is conducted by women in the home. Gendered norms about care being women’s ‘work’ are widely held in society with little or no recognition of how women subsidise the welfare system. Unpaid care work is not
factored into the calculation of Gross Domestic Product. It is safe to say that it is taken for granted and remains invisible to policy makers and planners.

Estimates by Debbie Budlender of the proportion of women’s unpaid care work of GDP range between 11% and 30% depending on what type of measure is used (Budlender 2008). Using time use surveys, she also estimated time spent on care work and found that women spent more time on care work than men in South Africa which is not unusual internationally, but the discrepancy in the amount of time spent here is large. For instance, Budlender found that women spent 246 minutes per day (4 hours) of unpaid care work in the home compared to men who spent 89 minutes (1.5 hours) (Budlender 2008). Focus groups with NPOs engaged in community care programmes confirmed that gender divisions in care are widely held and that men viewed themselves as the breadwinner and heads of households and that care work was perceived to be women’s work (Patel 2010).

Tammy Shefer makes an important point here when she says that shifts will only occur if we detach care work from its association with gender (Shefer 2014). By viewing it as a private matter and by not valuing care work, it continues to reinforce the sexual division of labour in the home. The focus on the redistribution of care is a positive development promoted by civil society organisations such as Sonke Gender Justice Network that works mainly with men. It is however limited as it does not take into account the large numbers of women who are single parents which is a reality in South Africa where around a third of households are headed by women with children. Many more care for children of relatives, for the sick and older persons. This is in keeping with changing family structures where the nuclear family is not the dominant family form in our context.

Similar gender norms undergird paid care work in the social service or caring occupations where women outnumber men in care professions such as nursing, education and social work. In the delivery of welfare services, both public agencies and NPOs deliver services. They in turn, employ care workers such as volunteers, community and home based care workers and Early Childhood Development workers.

The adoption of the Occupation Specific Dispensation for teachers and social workers resulted in salary increases and social benefits in the public sector. Significantly lower salary levels for social workers exist in the NPO sector (Budlender and Francis 2014). As a result, many NPOs have lost staff to government in view of the higher salaries paid to social workers in the public sector. Public sector workers in the social services are well organised and able to defend their wage demands and interests but this does not seem to be the case in the non-profit sector.

This scenario exists despite the fact that NPOs deliver the bulk of welfare facilities and services to children, families and vulnerable populations (Patel 2015). Despite this, the Department of Social Development’s (DSD) transfers to NPOs have decreased in the Medium Term Expenditure Framework while salaries of public sector workers have increased (Budlender and Francis 2014). This is also occurring at a time when the demand for services is increasing especially in times of economic crisis when resources are constrained.

When public servants are engaged about the salary disparities between NPOs and government, it is often argued that government is subsidising the services and that government is not the employer. Instead NPOs are effectively subsidising the government.
From this perspective, NPO employers are blamed for the low salaries and not inadequate government subsidies of care services that are a public good.

Volunteering in care services is a valued resource that NPOs rely on. About a quarter of volunteers are engaged in the social service sector with many employed in community care services. Their contribution remains unrecognised. Many volunteers do voluntary work but they are not covered by the Basic Conditions of Employment Act of 1997. Salaries and wages for informal carers engaged in community based public works programmes are set by a Ministerial Determination, but salaries are low.

This demonstrates the extent to which care workers are underpaid and undervalued. It also illustrates a fundamental unfairness in the way care services are funded. Moreover, it shows how gender inequalities and gender norms in the private domain are reproduced in the public sphere.

Care workers outside the public sector have few advocates for their cause. Unless these fundamental inequalities are elevated and movements for social and community change support their cause, these injustices will continue to exist. Further, financing of NPOs need to take account of the actual costs of services and should not lead to the abrogation of state responsibility for care needs. Informal care work needs to be recognised as such. In this regard the National Development Plan (2013) proposed a complementary role for NPOs in the delivery of welfare services. But how this is to be done is not clear and neither does it have anything to say about the gendered nature of welfare services and its critical role in social and economic reproduction.

**Theme 2: Gender and social protection**

Social protection policies refer to cash and in-kind benefits provided for by the state, market, third sector and families, households and communities to protect people against various risks in the life cycle. Social assistance is a social protection strategy which is widely used in South Africa. It is publicly funded and delivered and is one of the country’s largest social development programmes reaching 11.7 million children. The total number of beneficiaries in 2015 were 16 million made up of older persons, people with disabilities and children. In fact, our social assistance programme is probably one of the largest in Sub-Saharan Africa. Alongside social assistance exists social insurance that consists of worker and employer contributions. In view of our high unemployment rates and informal employment, many people do not qualify for benefits and fall through the social protection net.

But let’s consider the gender assumptions under-girding social protection policies and how these are changing. First, welfare policy regimes in the North were fashioned on the male breadwinner model and the nuclear family. The assumption was that when the male breadwinner is unable to provide for his wife and their family, social welfare policies will mitigate this risk. These assumptions were prevalent in different welfare regimes in the North to varying degrees depending on the country context.

Scholars of welfare regimes (notably Esping-Andersen 1990) were criticised in the 1990s by feminists in the North for being gender blind. This has opened a large debate on how social protection policies reinforce patriarchy. This did have an impact on social policy options in
the North such as taxation policies for families; publicly funded child care, flexible work arrangements; reconciling work and family obligations such as parental leave to mention a few. The debate in the North has now shifted to social policies that are conceived of as social investments in human capital development that will yield long-term economic and social returns such as early childhood development programmes. The idea here is to promote women’s labour market participation while at the same time encouraging child bearing. These policy options are criticised for being overly focused on employment rather than gender equality. Early Childhood Development policy discussions in South Africa do not consider women’s employment and empowerment but tends to focus on child well-being only.

Early South African social protection policies were fashioned on Northern ideas. The State Maintenance Grant that was abolished in the late 1990s was based on the male breadwinner model of social policy. The redesign of the Child Support Grant shifted fundamentally away from a maternalist model where motherhood is positioned as the main criterion for access to social grants. The CSG follows the child not the mother of the child. Any person, whether male or female, who is the primary care giver of the child, is eligible if they meet certain income thresholds. To uncover gender issues in social grants in South Africa, the design features of the programme certainly breaks with earlier social policy models. The CSG represents some degree of public responsibility for child care for disadvantaged families. Unlike the Latin American model with its conditionalities attached to grant receipt, our social grants system had no conditions attached initially such as that a caregiver should ensure that a child attends school. In the Latin American programme, conditions such as the obligation that a child should be taken to a clinic, should attend school and that the caregiver (who is usually a woman), should perform community work. In the evaluation of the Latin American programmes, these conditions especially community work was found to increase the time pressures on women and it also forces the idea that they should do unpaid community work.

To the best of my knowledge, there are no social protection programmes in the South where there has been a significant expansion of social protection for families and children that is gender neutral in its targeting. All are targeted at the mother of the child. It has been argued that women are viewed in an instrumental way in that they are merely conduits for the promotion of child well-being which underlies child-centred social policies. Child well-being is privileged over the position and status of women. To some extent this criticism is applicable in South Africa as the focus is more on child well-being but less on the empowerment of women. More telling is the fact that despite the gender neutral targeting of the CSG, the majority of beneficiaries are women which reflects the social beliefs about gender in the society at large. Few men take up the grant and estimates range between 2% and 5%. We know very little about the men who receive the CSG and focus groups with men suggest that they perceive this to be a grant for women (Mavungu et al. 2012).

So, in our research in Doornkop, Soweto – a large urban township on the outskirts of Johannesburg, we explored the link between women’s empowerment and child well-being (Patel, Hochfeld, Moodley and Mutwali 2012). We found that the CSG empowers women in one decisive way: it increases women’s power and control over household decision-making in financial matters and in general household spending in relation to child well-being. It also significantly increased caregivers’ engagement in the care of children through reading to them, playing with them, doing homework, more so than non-CSG beneficiaries. It did not however have an impact on gender relations. So there is some evidence then of the unintended gender transformative effects of the CSG. What the CSG’s effects are on male
beneficiaries who are the primary caregivers of the CSG is not known. More research is needed on why men do not take up the grant and where they do take up the grant, we ask does this have the same gender impacts that we observed in our Doornkop research?

Theme 3: Gender and the debate on minimum wages

Turning to the debate on the introduction of a national minimum wage in South Africa, gender does not feature in the current debate at all. To be fair, limited research has been conducted of the impact of minimum wages in South Africa, there is therefore considerable scope for further research to inform welfare policies although this is an area that welfare policy analysts tend to leave to the economists. I would argue that scholars of welfare policy do and can make a significant contribution to the debate in view of our concern with the reduction of poverty and inequality including gender inequality and of groups who have low economic participation rates. Let me elaborate briefly.

Almost 90% of ILO member states have minimum wage systems made up of either a national minimum wage, or sectoral determinations (SD) or a hybrid of the two. South Africa has a Sectoral [Wage] Determination (SD) system which is set by the Minister of Labour and Bargaining Council (BC) agreements consisting of labour and business including a much smaller proportion of workers who are covered by wage agreements between a trade union and employers. SD and BC agreements cover close to 70% of low wage workers in the country in different sectors and vary by geographic region. There are therefore large variations in wages and thousands of different determinations. The argument for a national minimum wage is that it will streamline the system and reduce poverty and particularly wage inequality which is one of the reasons for the country’s high inequality rates. The policy is now high on the political agenda and is likely to be implemented at some stage in the future.

In regard to gender inequality, women earn lower wages than men and are employed in low skilled jobs and in particular economic sectors such as domestic work, wholesale and retail, hospitality, contract cleaning and farm labour. These low wage sectors are covered by Sectoral Determinations that are reviewed from time to time. The current average minimum wages set by Sectoral Determination amounts to R2 457 (US$ 158.92) per month and the median wage in each sector is much lower with domestic work at the bottom of the ladder which was set at R1 619 (US$ 104.72). Limited research has been conducted locally on the impact of minimum wages on women’s employment (except for domestic work), on reduced hours of work and in reducing the wage gap.

Newer research findings by the Development Policy Research Unit at the University of Cape Town, found that internationally, minimum wages have not had a major impact on employment; but this depends on the level of the wage that is set and also on the extent to which compliance is monitored. Similar findings were noted in South Africa except in agriculture where negative effects were recorded and these were also specific to particular geographic areas. The findings do however suggest that a minimum wage policy did lead to increased wages in most sectors for low income workers (DPRU 2015). Low wage workers living in larger households where few or no members are employed would benefit most from a minimum wage.

But what will this mean for women who are not in the formal labour market?
Women in the informal sector are not covered by minimum wages. This is relevant to care workers. We have high unemployment in South Africa with higher rates of unemployment among women in general, among youth and young women. The case of young women is illustrative for this purpose. We have a 37% unemployment rate among 15-34 year olds. But this statistic hides the fact that unemployment among young women is 41% compared to older workers aged 35 years. Youth but particularly young women are therefore more vulnerable to unemployment and they also make up the largest group who are not in employment education or training (Stats SA, Quarterly Labour Force Survey, 2014).

If we look at the transitions for males and females from school to work, we see stark differences. Boys enter the labour market slightly faster and at a younger age than girls, meaning they get to the front of the labour queue more quickly. This is despite the fact that girls are staying in school or training longer. However, we don’t see girls catching up and their labour market absorption rate is lower than for boys. Right through, the employment outcomes for girls are lower than for boys with women earning less than men at the same educational level. This reflects continuing social care dynamics but may also point to some resistance in the labour market itself.

The gender gap in employment outcomes widens as youth get older. Further, this gap has become more pronounced since 2008. Although the increase in the incidence of long-term unemployment has increased amongst both male and female youth, we know little about women’s transition into the labour market and how this might be facilitated and supported.

There is limited research on gender impacts and issues in relation to minimum wages. I wish to call on feminist social scientists and economists to work together to contribute to this debate locally but also in the Global South where these issues seldom inform the social policy debate (DPRU 2015).

Conclusions

In conclusion, as we look ahead, three trends emerged from the themes that I identified. I think these trends are worth noting as we think about and debate on new directions in gender and social policy in the South.

First, care is crucial to social and economic development. But gender the gendered nature of welfare and care regimes are seldom interrogated. Unless countries in the South grapple with finding ways to redistribute care responsibilities in more equitable ways, women will continue to pay the price of social reproduction in the home, the family, community and society at large. The solutions are not easy as families will continue to remain the main providers of care. Innovative solutions might be found in the provision of infrastructure support through the delivery of basic services to ease the burden of care e.g. water, electricity, sanitation, housing and transport costs. Creative ways of expanding access to child care services and supporting households to boost their income earning capacity such as support for livelihood strategies and combining cash transfers with other supportive family and household level interventions, might serve to ease the burden of care.

A second trend points in the direction of rethinking cash transfers to be more gender transformative is in its design, its implementation and in the monitoring and evaluation of its outcomes.
South Africa’s Child Support Grant (CSG) achieves this to some extent, but there are limitations such as the fact that few men take up the grant; and where they do, we do not know what the gender dynamics are. Research shows that money channelled via women is more likely to benefit child well-being. We do not know whether the same outcomes apply when men are the beneficiaries of the CSG. Much of the policy thinking is beginning to shift to understanding how a package of social and economic policies might work together to achieve more gender equitable outcomes that could also move beyond income.

Simply put, for social protection to be transformative, it needs to be gender transformative, and move beyond fulfilling women’s rights and working for one dimensional notions of equality. Transformative social protection policies might be able to move society further along the road towards genuine social justice for all members of society.

A third trend speaks to the importance of using a gender lens in the analysis of macro social and economic policies such as minimum wages – as these have the potential to make significant impacts on poverty and inequality. Minimum wages could have significant benefits by improving the standard of living of women especially those with low levels of education. It could also contribute to closing the gender gap in income. I would hope that issues of gender justice will feature in the deliberations on minimum wages by employers, government and trade unions in South Africa in the future. The key issue is what the level of the minimum wage should be and whether all workers in all low wage sectors will be included. This is important as there might be unintended effects of the policy such as wage and employment trade-offs. Based on economic modelling conducted by the DPRU (2016), there is likely to be employment loss ranging between 281 000 jobs if the NMW is set in the lower band of US$ 158.92 and just over a half a million jobs if the NMW is set at the upper band (US$ 219.92). At the higher level the researchers argue that job losses are likely to offset the increases in household income that may arise from a minimum wage. These issues are important in a context where women make up the largest group of the unemployed and in a wider context of extraordinary high unemployment of around 25% reaching just under 40% if an expanded definition of unemployment is used.

Further, little is known about what adjustments employers are likely to make such as introducing reduced working hours and increasing the use of technology which will displace unskilled workers.

There are many issues for gender equality advocates and researchers to think about and to contribute to the debate.

In closing, social policies are often viewed as passive and top down instruments to enhance human wellbeing and equality. But little thought is given to what these instruments do, what outcomes they achieve and how both men and women exercise their agency to bring personal, structural and political change.

Women loom large in welfare and development NPOs and in the public sector with high levels of community participation in South Africa and in some countries in the South. From our research in selected urban and rural areas, we also know that while women are as likely to vote as men, more women than men voted in poor communities in previous elections (Patel et al. 2014). They are also active participants in ward meetings convened by their local Councillors who are elected. If the new direction in social policy is to gain any traction both locally and in countries in the South, women will need to exercise their electoral and political
power to achieve these changes. But by themselves they will not go far, they need all citizens including men to support their call. The challenge ahead is to combine research and scholarship with a scholarship of application and engagement in social and political change in the South which might also be of relevance to social policy scholars in the North.

References


