Overcoming Poverty and Inequality
Guide to Carnegie3 Conference

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Introduction

In the year that South Africa hosted the soccer World Cup, some 20 years after the country began to undo the ravages of its racist history by releasing Nelson Mandela and his fellow prisoners from jail, the National Planning Commission (NPC) was created by President Jacob Zuma. This marked the beginning of a new phase in the transformation of the South African political economy. Instead of reacting to the inheritance of the country's apartheid past, government leaders began to consider and plan for a future that lay well beyond the next election. At the same time within the universities there were stirrings of a need to revisit the work of the 1980s when a major Inquiry had laid bare the full extent of poverty in the country. Had the time come, people wondered, to investigate why so little seemed to have changed in the material lives of poorer South Africans despite the best intentions of the new democratic government?

These two streams of thought came together at the University of Cape Town (UCT) towards the end of 2011, when Minister Trevor Manuel, chairperson of the NPC, met a Poverty & Inequality Planning Group which had recently been established at the university. He suggested that the thinking of researchers in universities round the country might be drawn together for the benefit of policy makers. In addition to the support of the NPC, the Vice Chancellor of UCT was also able to persuade the Carnegie Corporation of New York – main funder of the two earlier Carnegie Commissions/Inquiries into Poverty in South Africa – to support this initiative, both by providing significant seed money and by allowing the university to use the Carnegie name. Thus an Acting Pro Vice-Chancellor for Poverty & Inequality was appointed at UCT and planning began for the September 2012 conference.

The Carnegie3 Inquiry was designed as a process – led by the universities – involving academics, civil society organisations and government officials at different levels in thinking creatively about effective action to move the society towards the goals spelt...
Promoting social justice and development: the role of universities

During the conference a panel discussion was organised on ‘Promoting social justice and development: the role of universities’. The members of the panel were: Judy Favish (UCT), Dr Colleen Howell (UWC), Alida Van Dyk (Fort Hare University), Dr Vhonani Netshandama (Venda), and Dr Jerome Slamat (Stellenbosch). The panel was chaired by Prof Crain Soudien, UCT’s Deputy Vice Chancellor.

Panel members provided examples of engaged scholarship which illustrated the multiple ways in which academics and students contribute to social, economic, environmental and cultural development. The cases reflect a commitment on the part of individual academics or groups to grapple with the challenges of social justice, social reconstruction, human rights, critical citizenship, and the empowerment of disadvantaged communities as agents of change. The activities involve engagement with a wide range of constituencies including marginalised communities such as small fishing communities, big and small NGOs, various levels of government, student societies, museums, galleries, trade unions, schools, national and international development agencies, community-based structures.

Multiple purposes inform the activities. These include:

• Strengthening capacity and institutions for social dialogue and partnerships for employment creation and sustainable development;
• Establishing or actively participating in multi-stakeholder initiatives consisting of researchers, practitioners, local communities and other key players to foster dialogue and achieve long term, sustainable change drawing on relevant research e.g. the Southern Africa Food Lab, the CityLab, and the People’s Health Network; and
• Developing an evidence-base for policy, advocacy and management protocols based on core principles of human rights, social justice and sustainability e.g. in the area of children’s rights and poor small-scale fishing communities.

Finally the activities illustrate a strong commitment to knowledge dissemination e.g. through the use of websites, the production of CDs, educational resources, exhibitions, popular pamphlets or learning materials, radio programmes, festivals, capacity-building workshops, public commentary, and the provision of continuing education courses.

The universities have also established structures to help facilitate greater access for communities to the intellectual resources of the universities. The aim of these structures is to help broker partnerships between academics and students and communities, primarily in disadvantaged communities, around formulating strategies for addressing development challenges and producing graduates with a social conscience and commitment to promote social justice.

Universities face the challenge of developing clearer strategies for assessing and enhancing the impact of engaged scholarship and trying to ensure that we learn how to build partnerships based on the principles of respect, reciprocity and co-determination. Institutionalisation of engaged scholarship is also a big challenge.
out in the National Development Plan (NDP), notably the elimination of poverty and the significant reduction of the current levels of inequality.

By common consent the scope of the initial conference was widened to include both poverty and inequality. At the same time participants were invited to contribute not only from the universities around the country but also from many of the non-governmental organisations (NGOs) working at the coal face, as it were, of poverty where inequality is most keenly felt. Participants were also invited from all levels of government. The call for papers was sent out in May 2012. Despite a very tight deadline the response was overwhelming: more than 300 papers were submitted and some 500 people attended from all corners of the country. Generous support (with no strings attached!) from both the NPC and the Treasury made it possible for at least one author of every paper to be present for four exceedingly full and stimulating days.

The conference was organised in such a way as to maximise both formal and informal interaction. The model was that of pollinating bees buzzing around an orchard in spring creating fruit. ‘Brown bag’ lunches enabled participants to wander around meeting people, discussing and sharing ideas. A ‘Festival of Ideas’ with photographic displays by various NGOs and a series of films run during the lunch-hour added to the wealth of material shared.

More formally, there were also big plenary sessions where keynote speakers – including Deputy President Kgalema Motlanthe, Minister Trevor Manuel, Former Constitutional Court Justice Kate O’Regan, Dr Mamphela Ramphele, Bishop Malusi Mpumlwana and the Vice Chancellors of the Universities of the Free State and Cape Town provided much food for thought. But much of the drilling down into specific areas occurred in the parallel sessions where four to six, even seven, papers were presented and discussed in two to three hour periods of intense debate. As there could be as many as six to ten such sessions happening simultaneously it was not possible for anybody to attend everything although much was subsequently shared in mini-plenary report back sessions and over innumerable cups of coffee. The Impumelelo Social Innovations Centre not only introduced us to many of the NGOs that participated in the conference but also generously offered to host their major Innovations Award Ceremony as part of the conference, thus enriching participants’ understanding of all that is happening around the country at this level.

Readers of the Rough Guides to different
countries – Ethiopia, France, India and elsewhere – will know how invaluable such a guide can be for anybody planning a visit. It is, of course, no substitute for travelling to the country in question but it can do a lot to facilitate the process of learning more about what to look for when one gets there. In the same spirit then, when thinking about how to report on the conference, at which some 300 papers were presented and more than 500 people gathered for four days of intense discussion at UCT in September 2012, the traveler’s Rough Guide suggested itself as a useful model.

Whilst it is not possible to capture all the debate that took place it is hoped that this Guide will go some way to filling the gaps. Full details of the conference, including synopses of every paper, podcasts of some keynote addresses and full texts of all papers released by their authors are available on www.carnegie3.org.za, together with a lot of other material. The Guide identifies the main themes running through the conference, notes each contribution briefly, discusses areas needing further research and points out some of the major gaps that have emerged – either in the set of conference papers or in the NDP itself.

Those who wish to dig deeper than this Guide should refer directly to the papers mentioned in the text. Some of these are available on the website; some, for a variety of reasons (including being work in progress), are not yet available; and some may be obtained directly from the authors themselves (the email addresses of contact authors are provided in the book of abstracts also available on the website). But not all contributions came in the form of written papers: there were also significant power-point presentations as well as keynote addresses. Added to this were important verbal introductions to discussion groups. We have not managed to track all of this material down but we have done our best. Wherever an article or other contribution is mentioned in the text of this Guide there is a footnote – both to identify and to acknowledge it. It is possible that mention of an article may include a few lines taken directly from the text, but without quotation marks. We trust that authors will not see this as blatant plagiarism so much as an attempt to provide readers with a proper idea of what is in the paper. For this reason, although we have spent a lot of effort in writing this guide, we believe it is more accurate to identify ourselves as editors of a text to which some 500 people have contributed.

Among the big questions that emerged are: How do we South Africans design the structures of public life so that there is increased accountabil-
ity? How do we increase access to justice for those who are poor? How do we overcome the legacy of a migrant labour system which for over 100 years has generated deep rural poverty centred on the Reserves set aside by the 1913 Land Act? How do we enable the majority of primary schools to educate their learners to be properly literate and numerate? How do we transform into effective policy the evidence that young children who start with mother education will learn better (and learn English) in later years? How does this country develop strategies to turn back the tide of TB and HIV which threaten to engulf so many areas? Is school-feeding the most efficient way of ensuring adequate nutrition for all our children? Would it be possible to turn one of South Africa’s smaller towns into a model of restitution where the wide gap between rich and poor is steadily narrowed in terms of education, health, public space, safety and income? What role can faith-based organisations and churches play? How can the enormous power of new digital technology and applications be more effectively deployed to empower and enrich the lives of those living at the lower end of the economic pyramid? How could the pioneering work done by various city councils in turning their rubbish dumps into bird sanctuaries and their most violent no-go areas into zones of community collaboration be adopted by other towns and cities around the country? South Africa is surrounded on three sides by sea: Are we thinking creatively enough about maritime job creation?

There are dozens of other questions springing out of the thinking reflected in this report and many inspiring examples of models that are working. Clearly more work is required but in seeking for answers it is also obvious that the solutions will be found not only in academic papers but in active discussion between people on the ground who understand the problems, academics who are informed and equipped to analyse and think about the issues involved, and government officials at various levels who are keen to make policy more effective and improve service delivery.

There is, of course, much other relevant work

**We have to find ways of bringing sites of knowledge – universities, the world of practice, and the authority of the state – together in more deliberative ways. We have begun here, and that’s really important**

Crain Soudien, Chairperson, Poverty & Inequality Planning Group, UCT
happening in the country which was not presented at the conference and is thus not included in the pages that follow. But the Guide is a rich text; full of interesting ideas. Due and proper acknowledgement for all the work that has contributed to this report would run to hundreds of names, starting with the 500 or so authors and contributors to the Towards Carnegie3 Conference held in September 2012. Then there are all the people who worked behind the scenes to make the conference happen and run so smoothly and creatively. Plus the organisations and people within them who generously helped the process along the road in all sorts of different ways – by giving time, money, advice, contacts, moral support and the benefit of their experience.

This has been an extraordinary team effort involving people and organisations at all levels, including government, and in many different parts of South Africa. This is a tribute to the burning concern felt by so many South Africans and others to find ways to tackle effectively the scourge of widespread poverty and deep inequality which blights the country. We are grateful to all for their contributions.

While the Guide is a conference report, it was produced as a contribution to the ongoing Carnegie3 process, from which it is hoped that much work will commence and continue on strategies and actions to overcome South Africa’s poverty and inequality over the next few years. We hope it proves useful.

F.W. & V.V.C.
Challenge and Response

Challenge

The best overview of the twin scourges of widespread poverty and deep inequality in South Africa is that written by Murray Leibbrandt and his colleagues at the request of the Organisation for Economic Cooperation and Development (OECD).¹ This paper, published in 2010, undertook a meticulous examination of trends in the statistical measures of both poverty and inequality over the first 15 years after the ending of apartheid in 1994. Some of these figures have been updated by subsequent researchers and the overall results were brought together in the opening address to the Towards Carnegie3 Conference by the Vice Chancellor of UCT, Dr Max Price. For the purposes of this Guide, the OECD paper (which was also submitted to the conference) and the Vice Chancellor’s address² will be the main sources for statistics on the current state of poverty and inequality in South Africa. Put very simply the figures show four things:

• Poverty is widespread and severe, with over half the population (54%) in 2008 living on per capita incomes below the Poverty Datum Line (PDL) of R515.
• However, the level of poverty improved somewhat between 1993 and 2008 in the sense that the proportion of those in poverty fell slightly (from 56% to 54%) and the depth of poverty (the degree to which household income falls below the PDL) shifted considerably as social grants – notably in the form of old age pensions and child support grants – were rolled out by the democratic government. Only for the poorest 10% of households do social grants appear to have failed as these households consist largely of younger unemployed men not living with either salaried workers or with those eligible for social grants.
• Inequality in the society is very deep; South Africa has a Gini coefficient, based on household incomes of 0.70, which compares unfavourably

¹ Murray Leibbrandt, Ingrid Woolard, Arden Finn & Jonathan Argent – Trends in South African income distribution and poverty since the fall of apartheid [152]
² Available as a podcast on www.carnegie3.org.za
with virtually all other countries for which measurements exist.

• Moreover inequality appears to have deepened over the past 15 years, due largely to widening inequality within previously disadvantaged groups rather than an increasing racial divide between black and white.

The causes of both poverty and inequality lie deep within South African history, and can be traced through the long process of conquest as it fused with the country’s race-biased industrial revolution in the century after the mineral discoveries of the late nineteenth century. This history cannot, of course, be rewritten but it is important to understand and acknowledge if the country is to find ways of overcoming this dimension of its heritage.³

George Ellis, best known for his work on cosmology and the shape of the universe, has also applied his mind to the nature of poverty in South Africa. Thirty years ago he contributed a paper on ‘The Dimensions of Poverty’ to the second Carnegie Inquiry.⁴ This time round, drawing on thinking about causation – both top-down and bottom up – that he developed in a presidential address to the Royal Society of South Africa,⁵ he urged social scientists to get a synoptic view of the complex set of interlocking factors that lead to the present situation.⁶

Somewhat simpler than this set of interlocking factors was the picture presented by Braam Hanekom of the Dutch Reformed Church (DRC) who, drawing on the long history of his Church’s concerns with poverty, identified what he saw as its four defining pillars:⁷

• Structural causes
• Education
• Psychological reasons
• The moral fabric and values of our society.

Perhaps the most controversial of these – which was highlighted in the first Carnegie Inquiry into white poverty at the beginning of the 1930s – is that referring to psychological reasons, which to some analysts at least comes perilously close to blaming the poor for the condition in which they find themselves. There is always that danger but perhaps such an analysis by the DRC now needs to be re-read in the light of Steve Biko’s celebrated

³ Francis Wilson – Historical roots of inequality in South Africa [297]
⁴ George Ellis – Carnegie Conference Paper no.4, Cape Town, 1984
⁵ George Ellis – On the nature of causation in complex systems, Transactions of the Royal Society of South Africa vol.63, no.1, 2008
⁶ George Ellis – The need for a synoptic view [76]
⁷ Braam Hanekom – Defining the pillars of poverty [102]
insight that “the most potent weapon in the hands of the oppressor is the mind of the oppressed”. In other words, if the psychology of oppression required probing analysis by the proponents of Black Consciousness does the psychology of poverty and inequality not require similar probing?

A different perspective on the dynamics of poverty and inequality comes in the important paper from Oxford by Michael Noble and Gemma Wright, who used a range of indicators of deprivation to demonstrate the spatial legacy of apartheid. Using the concept of Datazones, very small spaces roughly the size of electoral areas for which they could obtain information about household income, education, health and so on, they constructed a map of South Africa showing the level of welfare in each of these Datazones. The most striking feature is that the most deprived, poorest areas of the country correlate almost exactly with the old labour reserves, the former ‘Homelands’ of apartheid. A map of poverty in South Africa is thus essentially a map of the ‘Homelands’ or ‘Bantustans’. It is this fact which Kate Philip analyses in her critique of the concept of the ‘two economies’ as propounded by President Thabo Mbeki. The danger of such thinking, she argues, is that it leads to an analysis of two separate economies where the second is essentially the problem – an “economy left out, left behind, undeveloped and excluded from economic opportunities because it is disconnected”. Against this view, Philip puts forward the case for ‘inclusive growth’ pointing out that without it, the marginal areas of the country will remain marginal.

This critique can be strengthened further by showing the long-term consequences of the country’s migratory labour system on simultaneously generating wealth in the urban areas to which the migrants went, whilst generating poverty in the informal urban areas. These areas are the boiling cauldrons of discontent, where glaring inequalities are evident, in close proximity to urban formal areas where services are good and accumulation is happening.

Ivan Turok

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8 Steve Biko, Speech in Cape Town
9 Michael Noble & Gemma Wright – Using indicators of multiple deprivation to demonstrate the spatial legacy of apartheid in South Africa [203]
10 Kate Philip – Inequality and economic marginalisation: How the structure of the economy impacts on opportunities on the margins [214]
rural areas whence they came.\textsuperscript{11} Mduduzi Biyase of the University of Johannesburg investigated the relationship between poverty and remittances in South Africa, using the National Income Dynamic Survey (NIDS) 2008 dataset. His presentation sketched continuing geographical and racial patterns in poverty levels among those living under tribal authorities (73\%) and those living in urban formal areas (27\%), and showed the significant impact of remittances on the poverty rate.\textsuperscript{12}

Poor South Africans are still typically female, African and rural. Female-headed households are commonly understood to be vulnerable to external shocks given the unequal position of women in society, particularly in the economy.\textsuperscript{13} Women typically head up households with more children than do men, including children who are not their own. Female-headed households are also more common in rural than urban areas. These factors increase their dependency and vulnerability. Whynie Adams of the National Department of Social Development presented the findings of a 2008 research study ‘Building Sustainable Livelihoods’ by the National Department of Social Development in some of the poorest rural and urban areas in the country which profiled the socio-economic and demographic characteristics of these areas, evaluated social services and recommended ways to improve service delivery. The report highlighted different ways of defining poverty, focusing on working with people to identify and enhance their existing strengths and knowledge. A common theme was the strong link between poverty and gender inequality, and the wider implications posed for effective and targeted service delivery. The report also examined attitudes and perceptions towards sexual and reproductive rights and how the absence of such rights plays a critical role in gender inequality and gender-based violence. The findings suggest that more work needs to be done to explore these attitudes and shape more nuanced, subtle campaigns that consider the specific and unique needs and attitudes of local areas, rather than ‘one size fits all’ national campaigns.

One attempt to address the urban/rural imbalance is the Community Work Programme, using government funding to offer two days of work a week, with the work chosen by the community to contribute to the public good. While this is an

\begin{thebibliography}{9}
\bibitem{11} Francis Wilson – Understanding the Past to Reshape the Future, in Paul A David & Mark Thomas [eds], \textit{The Economic Future in Historical Perspective}, British Academy, 2003
\bibitem{12} Mduduzi Biyase – The relationship between poverty and remittances in South Africa [28]
\bibitem{13} Whynie Adams – Poverty, inequality and gender: The nuanced and not so nuanced links and implications [2]
\end{thebibliography}
important contribution, the nature of the linkage between the old labour reserves and the rest of the economy requires fundamental restructuring to overcome the consequences of a century of oscillating migration which have impoverished these rural areas. Put simply, what economic policies can be established to enable people now living in areas such as the Eastern Cape, north of the Kei river (the old Transkei) to produce wealth within the region? Or, is the future of the area previously demarcated as ‘Venda’ simply to serve as a long-distance dormitory suburb for Gauteng? Astonishingly little attention has been focused on this issue by the government since 1994.

It would be a mistake, of course, to assume that the dynamics of poverty are relevant only to the rural areas of the country as Lefatshe Moagi of Unisa emphasised with her paper on urban informal settlements such as Diepsloot in Gauteng where she used a functional analysis to explain the rise of poverty. In his presentation on ‘Dynamics and Spatial Traps’, Ivan Turok argued that:

*The spatial dimension of inequality is critical: we have to talk at local as well as national levels, to realise that we have mutually-de-

pendent futures, in particular places .... Yet most thinking about poverty and inequality is divorced from place. So we need a spatial perspective .... Informal urban areas are the boiling cauldrons of discontent, where glaring inequalities are evident, in close proximity to urban formal areas where services are good and accumulation is happening. Are these spatial inequalities merely a reflection of other factors? Some informal settlements are functional in that they are well located in relation to public services and economic opportunities, unlike areas on the periphery that are remote and impose costs of access to services and employment – this is the difference between ‘poverty traps’ and ‘escalators’. Space is not only an outcome of the economy, it shapes the economy.... The proportion of household budget spent on transport in SA cities is far higher than other African cities. In Cape Town, the growth of the economy is far away from where the growth of the population is – and it’s not just informal settlements, it’s also where we’re putting RDP settlements! It’s all totally unsustainable.... The alternative is: use spatial policy to integrate, and deal with inequality via spatial change.

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14 A Moagi – A functional explanation of poverty: The case study of informal settlements in South Africa [184]
Income inequality

Geoffrey Chapman analysed South Africa between 1990 and 2009, considering policies focused directly on alleviating poverty and inequality and identified some key reasons for persistently high levels of income inequality. The paper began with a review of South Africa’s economic history to establish why, despite its political legacy, poverty and inequality should not be persistently high. The paper reviewed the labour market, legislation, unemployment, the proposed youth wage subsidy, education, the informal sector and government grants, and the effectiveness of government policies and legislation in alleviating income inequality. It concluded with findings of a macro-level empirical analysis of income inequality, including that the ratio of government consumption expenditure to GDP has a positive impact, implying that increasing government size does not help towards equalising income distribution and that in their strive to alleviate poverty and inequality, the South African Government should be wary of this ratio.

Arden Finn, Murray Leibbrandt and James Levinsohn (of the Southern Africa Labour Development Research Unit at UCT and the Jackson Institute of Global Affairs at Yale University) used the first two waves of the National Income Dynamics Study (NIDS) to analyse income mobility using longitudinal data. NIDS is the first to do so at a nationally representative level. Using both absolute and relative changes as reference points, the authors highlighted some of the determinants driving South Africans into and out of poverty, making use of a new measure to examine the extent to which mobility has served to impact on long-term inequality.

Home ownership is one of the most important enablers of wealth creation, and can play a vital role in reducing inequality over time. Yet in an era of inflation-targeting monetary policy, interest rate volatility creates a disincentive to invest in housing, and penalises existing home owners with low levels of financial literacy who underestimate the impact of interest rate increases.

The transmission mechanism between macro-economic policy and home ownership in South Africa is complicated by provision of state-subsidised housing loans. However, even loan recipients are exposed to interest rate risk if they require funds beyond the value of the housing subsidy to purchase a home.

Reza Daniels of the University of Cape Town presented empirical evidence from Wave 1 and Wave 2 of the NIDS to evaluate entry and exit into the housing market. Because NIDS captures home ownership information, housing grant recipiency and negative

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15 Geoffrey Chapman – The problem of income inequality in South Africa [44]
16 Arden Finn, Murray Leibbrandt & James Levinsohn – Income mobility in a high-inequality society: Evidence from the first two waves of the National Income Dynamics Study [84]
17 Reza Daniels – Home ownership as a tool for long-term inequality reduction: reflections on the transmission mechanism between macro-economic policy and home ownership [60]
events experienced by household members before and after the South African recession, researchers can evaluate the characteristics of gainers and losers in home ownership.

While it is not possible to causally identify the link between home ownership loss or gain and interest rates in NIDS, the author identifies the impact of housing grant recipiency and home ownership transition status, and exploits all the features of the NIDS data to anchor a discussion of the transmission mechanism between macro-economic policy instruments and home ownership, with reflections on the long-term implications of this relationship for inequality reduction.

In another contribution drawing on NIDS data, Reza Daniels, Arden Finn and Sibongile Musundwa explored household wealth in the National Income Dynamics Study Wave 2, finding that financial debt dominates the majority of household debts.18

Response

So much then for the nature of the challenge facing South Africa. Poverty is widespread; inequality is profound; and the causes are complex, interactive and have deep and dynamic historic roots. It was to face this reality that a call went out to the universities and other institutions of South Africa in mid-May 2012, requesting papers to be presented at a conference in September. With such a short lead time, there was clearly no time for new research to be undertaken but it was hoped that researchers and activists would be willing to share their thinking, not least by tabling their current (or recently published) work. Once these papers were in, so the thinking went, it should be possible to consider what further work is needed to flesh out, on the bare bones of the NDP, strategies to overcome poverty and inequality in the years ahead. Those organising the conference thought that, given the short notice, we would be fortunate to receive perhaps 150 papers from 7 universities around the country. In the event over 300 papers were submitted from 19 universities in South Africa with further contributions from Oxford, Princeton, Michigan, Switzerland, Russia, and elsewhere. In addition a number of NGOs active on the ground

18 Reza Daniels, Arden Finn and Sibongile Musundwa – Wealth in the National Income Dynamics Study Wave 2 [61]
were invited to share their own rich experience and insights. Their presentations – particularly in the field of education (including early childhood development) and agriculture – provided some of the highlights of the conference.

A number of people active in different levels of government – including the Deputy President – came and participated actively, sharing their own ideas, answering questions, listening to criticism. Some important actors were not present – with neither business nor trade union thinking adequately represented, although there were papers on the stimulation of entrepreneurial activity and a good deal of thinking about the role of labour regulations.

One piece of serendipitous good fortune was that the international film company, STEPS, based in Cape Town happened to be in the midst of producing a series of films, *Why Poverty?*, scheduled for world-wide release in November 2012. Not only was STEPS willing to provide a preview of all their films (such as were ready) at the conference but they went further and agreed to make a film – which would be part of their series – especially for the conference. Thus *Story Tent* was produced.

This film – really a set of small films, modelled on another that STEPS had recently made in Bolivia – was made in Tembisa, an East Rand township, where by agreement with local leaders a tent was set up for a week and local people were invited simply to come in and tell their story, which was filmed as they did so. Over 70 people came and the final selection of stories provides a remarkable insight for middle-class researchers and others into just what it means to be living one’s life under conditions of great poverty in South Africa today. Shown at different stages of the conference in Cape Town, they made a great impact.\(^\text {19}\)

Other visual contributions to the conference included a series of photographs from the first and second Carnegie inquiries (held in the 1930s and 1980s respectively), to which was added a set of photographs taken more recently of creative grassroots NGO work around the country. These photographs were screened in the foyer of the conference venue, along with numerous, well-illustrated power-point presentations, short films and displays by participating organisations.

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\(^{19}\) All the films are easily accessible on [http://www.youtube.com/watch?v=pC7a4uQzfaU](http://www.youtube.com/watch?v=pC7a4uQzfaU) and on [www.carnegie3.org.za](http://www.carnegie3.org.za)
Whilst this might seem a little far-fetched, one way of seeing the September 2012 conference, or indeed the Carnegie3 process as a whole, is as a kind of social hydro-electric dam, designed to draw in as many streams as possible in order to generate power to drive effective strategies for action. Without wanting to push the analogy too far, it is important to note that the conference did not appropriate to itself all the work that was presented – it served as a platform for many working on the issues of poverty and inequality to share and cross-pollinate ideas.

One of the major streams that flowed in to the conference was a project conceived by economists at the Universities of the Free State and of Cape Town to generate and disseminate research on the issue of unemployment over the next two to three years. Clearly this is central to developing and scaling up of effective strategies to overcome poverty and/or inequality. The work of this initiative may be followed on www.econ3x3, and will happily be collaborating closely with the Carnegie3 process as it moves forward (see Chapter 3).

Another vital stream (and there are many more) is that flowing from the work of lawyers, drawing particularly on the Constitution with its emphasis on human dignity. This forms the subject of the next chapter where much of the lively thinking presented to the conference about the role of law in the new South Africa is summarised.

### Bridging the digital divide

Can the digital revolution make significant inroads in addressing inequality? Information and communication technologies (ICTs) can provide pathways out of poverty. By late 2010, Africa had exceeded Western Europe in the number of mobile connections, while the growth of internet usage between 2000 and 2011 exceeded 2000%, five times more than for the rest of the world, accompanied by an ever-expanding literature on the potential and contribution of information and communication technologies to economic growth, development and poverty reduction. Julian May of the University of the Western Cape (UWC) presented the findings of an East African case study into dynamics around access, use and impact of ICTs on poor households.\(^\text{20}\)

While the findings support increased investment in applications aimed at the poor, lower ICT costs and promoting ICT skills development in poor communities, he highlighted that it would take a century for a poor family to call, ‘text’, ‘tweet’ or ‘friend’ itself out of poverty. More research is needed, including into the intra-household allocation of the costs and benefits of ICT.

\(^{20}\) Julian May – Tweeting out of poverty: Access to information and communication technologies as a pathway from poverty [175]
CHAPTER 2

The Role of Law

Speaking at the opening session of the conference, Justice Kate O’Regan presented a powerful case for using the Constitution as a vital tool in addressing poverty and inequality. While acknowledging that the Constitution is no panacea or magic carpet, she argued that it offered a road map to the future and urged all South Africans to ensure the realisation of this vision. She stressed three features of the Constitution: the value-based conception of democracy; the adoption of clear, substantive goals for constitutional democracy; and the assertion of forms of civil participation in addition to the franchise. In closing, she stressed the need to increase the capability of the poor to participate actively in – and contribute to – our constitutional democracy.

Poverty occupies the hard, real world of informal settlements, flooding and fires, no proper toilets, a lack of food, poor schooling, cold, ill health and unemployment …

With contributing panelists Justice Mlambo and Professors Pierre de Vos (UCT), Sandra Liebenberg (University of Stellenbosch) and Linda Stewart (University of North West).

Addressing the role of the judiciary, Justice Mlambo called for judges to serve as constitutional activists, and emphasised the need for courts to be sensitive to context. In this regard, the higher education of legal practitioners and professionals came under scrutiny, and it was strongly suggested that their education needs urgent review, as too many legal graduates display a lack of understanding of social dynamics and socio-political systems.

De Vos stressed that our ‘post-liberal’ (his term) Constitution has the potential to transform society because the Bill of Rights (Chapter 1): (a) aims to be transformative; (b) includes socio-economic rights such as access to water, housing, food, health care, social security, education; and, (c) upholds a
participatory democracy.

Liebenberg added that the Constitution provides the most favourable textual framework in the world for pursuing socio-economic claims because of its clear commitment to achieving social justice and improving the quality of life of all. However, she highlighted the vast and growing chasm between the incomes and lifestyles of the top echelons of corporate South Africa and the living conditions of workers and consumers, citing the increasing prevalence of nation-wide service delivery protests as indicative of growing distrust in institutions to deliver clean, accountable and responsive government, as required by the Constitution. This crisis extends to civil society, with the shootings at Marikana highlighting so tragically the widening gap even between workers and established trade unions.

According to the Equality Clause (Section 9), the state may not unfairly discriminate directly or indirectly against anyone on one or more grounds, including race, gender, pregnancy, marital status, sexual orientation, belief etc. De Vos pointed that it could, but has not yet been, applied to economic status, suggesting that appeals to the Constitutional Court on this basis would give greater effect to the commitments in the Preamble. Liebenberg argued that the courts need to provide substantive markers or benchmarks regarding the obligations of public and private sector actors in relation to socio-economic rights, including definition of clear normative parameters for guiding policy-making processes. These guidelines are necessary if constitutional rights and values are to serve as our lodestar in holding government to account.

In the absence of effective mechanisms for addressing socio-economic needs and aspirations, it is understandable that impoverished communities and civil society organisations also turn to the courts. Based on the requirements of participatory democracy and read with the Promotion of Administrative Justice Act, the Constitutional Court has required state departments to engage meaningfully with “those affected”, which has been successfully mostly in overturning eviction cases. However, Liebenberg argued that the Court still sees its role as circumscribed and is reluctant to define the substantive

The Constitution seems to occupy the world of ideas, and beautiful ideas at that – far removed from this reality

Former Constitutional Court Judge Kate O’Regan
content of various socio-economic rights. Thus, despite the fact that the criteria of “reasonableness” and “meaningful engagement” hold promise for facilitating the involvement of poor people in decision-making, Constitutional Court decisions based on these criteria do not provide a panacea to the alleviation of poverty because of structural power imbalances beyond the reach of the courts.

Both de Vos and Liebenberg gave examples of where decisions have opened up other constitutional avenues for seeking redress for denial of socio-economic rights. This was illustrated in other sessions, including in a powerful presentation by the Equal Education Law Centre,1 established in 2012 to engage in public interest litigation and advocacy for provision of basic education in South Africa. While acknowledging the primary responsibility (and constitutional obligation) by the state for provision of education, multiple role players – including civil society, parents and learners – fulfil different, and related, functions. Against a backdrop of major systemic challenges in the education system – including unequal provision of resources, weak policy, poor implementation, inadequate monitoring and support, and other capacity constraints – the presentation explored the impact of strategic intervention to address these many challenges and ensure effective management of resources at all levels – national, provincial, districts and schools.

Linda Stewart, Professor of Law at North West University, shared a case study illustrating the complexities involved in dealing with socio-economic needs and the provision thereof by multiple role players.2 She drew on the experiences of Rooigrond, a displaced community in the North West Province, to show how marginalised, displaced and impoverished people in and around informal settlements are equated with human waste – and are increasingly turning to social protests, and profiled innovative approaches being used to raise awareness through the social media.

Another session on ‘Legal frameworks, law and justice’ heard evidence that recourse to legal frameworks, in particular the courts, can be effective in providing relatively immediate and tangible results for litigants, as opposed to political processes which are often drawn out and laborious, with little if any impact on the lives of the poor.

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1 D Holtzman & P Moyo – Addressing the challenges of poor quality and inequality in education in South Africa: The role of the law and civil society in creating a system of effective public accountability in realising the right to a basic education [114]

2 Linda Stewart – Socio-economic transformation and the need for a participative democratic society [253]
Accountability

South Africa’s constitutional democracy is based on inter alia the underlying values of accountability, responsiveness and openness. In a country characterised by poverty and severe inequality, the principle of effectively holding the government to account for its constitutional obligations to improve the quality of life of all citizens cannot be overstated. It was therefore apt that the first parallel session within the theme of ‘legal frameworks’ at the conference was convened to discuss the myriad questions related to the issue of accountability.

As issues of accountability and transparency go hand in hand, it stands to reason that the government of South Africa cannot be held to account for the action it takes (or fails to take), the laws it promulgates or the policies it adopts to fulfil constitutional rights, if the citizenry cannot clearly identify the values underlying the choices and actions of the state. Marthie Momberg of Stellenbosch University sought to shed light on what values and value choices underlie various government policies.

Momberg commenced by defining the concept of ubuntu and argued that if South Africans do indeed enjoy interconnectedness, then the value of ubuntu should underlie at least those policies aimed at the reconstruction or transformation of society. In commenting on an ubuntu ethos that arguably permeates the language employed in the NDP, Momberg emphasised that “Ubuntu consciousness does not only lie in the content of policies, but should also be embedded in the way government interacts with key stakeholders and the general public throughout the processes of development, implementation, maintenance, reflection, revision and further development”. The author noted that different values result in different decisions and decision-making processes.

Recognising that accountability will be hollow if those held accountable are unable to utilise stakeholder feedback to improve performance, the next paper addressed practical methods of using feedback by stakeholders and beneficiaries of development to evaluate and manage performance of development programmes.

Lawrence Matemba of the Presidency similarly sought to introduce practical solutions, proposing a complex conceptual framework to aid the (until-now fragmented) assessment of government performance while simultaneously promoting improved design and implementation of policies, programs, interventions and strategies.

Paul Hoffman of the Institute for Accountability in South Africa brought light to bear on the dire circumstances that can result when accountability

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3 This is drawn from a comprehensive report on the conference prepared by Tarryn Bannister, Margot Strauss and Shanelle van der Berg for SERAJ (the Stellenbosch University Socio-Economic Rights and Administrative Justice) research group. The full report may be found on www.carnegie3.org.za

4 Section 1(d) of the Constitution of the Republic of South Africa, 1996

5 Marthie Momberg – A need for clarity on the values that drive policy making [187]

6 A Proctor & D Bonbright – Improving poverty program performance measures: Just ask them! [222]

7 L Matemba – Assessment of government performance in post-apartheid South Africa: A practitioner’s perspective [146]

8 Paul Hoffman – The effect of corruption on poverty [113]
is lacking. The author defined corruption as “theft from the poor” and highlighted the serious impact of widespread corruption on efforts to combat poverty from the outset. With R675 billion lost to corruption since the inception of democracy in 1994, “available resources” in terms of sections 26 and 27 of the Constitution dwindle, and the obligation to take “reasonable measures” to realise, inter alia, the rights of access to adequate housing and to sufficient food and water simultaneously becomes watered down. Corruption reaches to the highest echelons of government, with a “loss of as much as R30 billion a year on corruption in the state tender process, one which is meant to be compliant with the values of section 217 of the Constitution.” Despite these highly worrying figures, however, a variety of measures exist to enhance accountability. Parliamentary oversight of the Executive and ‘Chapter Nine’ Institutions are important avenues to explore, but the system of proportional representation presents a material obstacle to the triumph of accountability and eradication of corruption.

During discussion, it was concluded that the Van Zyl-Slabbert Commission Report on the introduction of (at least partial) constituency representation should be considered seriously to foster accountability. Freedom of the press and the establishment of a truly independent anti-corruption commission (or ‘integrity commission’) is similarly vital. The session served to highlight the urgency of exacting accountability and eliminating corruption in any strategy aimed at alleviating the desperate plight of those still living in poverty in South Africa.

However, much discussion focused on how to transform the ‘confrontational’ nature of the judicial system – and an automatic retreat to ‘deference’ – into a forum for real dialogue between various actors so that the courts can fulfil their constitutional mandate to interpret and enforce the Bill of Rights.

Certain legal concepts such as ‘restitution’ need further elaboration so as to consider and acknowledge other, non-legal attributes of human experience. Reaching consensus on the moral justification for interventionist social policy can improve the legal framework in which actions aimed at eradicating poverty can occur. Civil society can play a key role in transforming legal frameworks to allow access to justice and meaningful participation by all stakeholders, especially the poor. However, more research is needed to practically improve access to justice as well as to deepen understanding of restitution and how this can be harnessed to heal the ‘racial wounds’ of the past. Participation is critical, as is promotion of agency of the poor and a transformation from victim into empowered citizen, although this by no means relieves courts of their duty to enforce the Constitution. The role of the courts is vital in holding government to account and demanding tangible relief for the poor, and
creating means to overcome obstacles and compel the political and elected branches of government to fulfil their mandates.

Rita Kesselring presented on apartheid-era victims’ recourse to courts and everyday attempts to overcome embodied inequality and experiences of violence. In some cases, legal recourse proved more effective than choosing a political route, especially for poorer groups. However, she suggested that confrontational, depoliticising elements of the judicial process need to be reviewed in an attempt to promote dialogue and contribute to the transformation of ‘victimhood’ to agency.

Exploring the need to give meaning to the right to social assistance, June Sinclair of the University of Pretoria suggested that a constitutional challenge to existing legislation should result in the introduction of a Basic Income Grant, the costs of which can be clawed back through taxation and other means. Courts should interpret the right of access to social security before resorting to weak reasonableness review, and should issue a structural remedy if the current legislation is found not to pass constitutional muster. Structural remedies with retained supervisory jurisdiction can serve as a catalyst for government action and are not barred by the separation of powers doctrine in that the Constitution empowers courts to make any order that is just and equitable. This was followed by Sharlene Swartz and Duncan Scott discussing restitution as a revised paradigm for the transformation of poverty and inequality. The presenters proposed a multi-dimensional approach to restitution of personhood to spur a more comprehensive research programme into the diverse

Ubuntu consciousness does not only lie in the content of policies, but should also be embedded in the way government interacts with key stakeholders and the general public throughout the processes of development, implementation, maintenance, reflection, revision and further development

Marthie Momberg

9 Rita Kesselring – Apartheid-era victims’ recourse to courts and everyday attempts to overcome embodied inequality and experiences of violence [powerpoint]

10 June Sinclair – Poverty: Giving meaning to the right to social assistance [244]
facets of restitution.\textsuperscript{11} As the economic effects of the political crime of apartheid did not fall under the mandate of the Truth and Reconciliation Commission, Edwin Arrison proposed the necessity to legislate mandatory restitution, but noted a lack of political will to tackle this thorny issue.\textsuperscript{12}

Vasti Roodt of the Philosophy Department at Stellenbosch University proposed that a social policy can be justified to the extent that it promotes fair terms of cooperation for all participants, paying particular attention to how such terms affect the most vulnerable members of society.\textsuperscript{13} In post-conference feedback, Dr Roodt suggested that an important research question for the ongoing Carnegie project is to develop a proper account of poverty and inequality as moral – and not merely strategic – problems in South Africa, and proposed that this could be launched under the auspices of the Stellenbosch Institute for Advanced Study (STIAS), and involve researchers from various disciplines at Stellenbosch and elsewhere.

Demand for pro bono legal services still far outweighs supply, despite the sterling work of Legal Aid South Africa, University Law Clinics and many NGOs. Patricia Erasmus and Soretha Venter of the University of Pretoria presented on the potential impact of the Legal Practice Bill, which will empower the Minister to improve and develop the current system of compulsory pro bono work for legal practitioners.\textsuperscript{14} Drawing on the experience of three projects set up by the University of Pretoria Law Clinic, the paper recommends a policy to give effect to the spirit and aims of the Legal Practice Bill, and embrace compulsory pro bono work as a positive tool for poverty eradication and increasing access to justice within the indigent sector of the population.

Desia Colgan of the University of Witwatersrand/Street Law addressed the role of government and civil society in ensuring access to social justice, with particular focus on research related to and implementation of a Succession Planning Project,\textsuperscript{15} as the technical and legalistic nature of the law constitutes a barrier to the realisation of the rights of poor children to inheritance. The session concluded

\begin{flushleft}
\textsuperscript{11} Sharlene Swartz & Duncan Scott – Restitution: A revised paradigm for the transformation of poverty and inequality in South Africa [259]
\textsuperscript{12} Edwin Arrison – Legislated restitution: A strategy to address poverty and inequality within South Africa [10]
\textsuperscript{13} Vasti Roodt – Fairness: The moral justification for social policy [234]
\textsuperscript{14} Patricia Erasmus & S Venter – Strategies to maximise the effectiveness of compulsory pro bono legal work (and ancillary services) in South Africa: The potential impact of the Legal Practice Bill [77]
\textsuperscript{15} Desia Colgan – The role of government and civil society in ensuring access to social justice for children [55]
\end{flushleft}
with a paper outlining a human rights approach to poverty and inequality, presented by Solange Rosa, Chief Policy Analyst in the Premier’s Department of the Western Cape Provincial Government,\(^{16}\) who emphasised the importance of participation, which although constitutionally entrenched deserves increased recognition.

Brand et al. of the University of Pretoria highlighted the need to frame poverty as injustice, pointing out some of the dangers of a purely pragmatic approach to poverty.\(^{17}\) The paper focused on the process of criminalisation of the poor – homeless or landless communities, refugees or asylum seekers, and vulnerable children or women in urban environments in the Tshwane metro – showing how a narrow conception of legality and pragmatic urban development concerns are used to exclude the poor from inner city housing in Johannesburg. In interpreting resource-related constitutional rights, the courts have withdrawn into an idiom of process, fairness and pragmatism suited only to protecting existing access to basic resources, thus avoiding deeper redistributive questions and issues of substantive justice that these rights raise.

Key suggestions emerging from the sessions on the Constitution, law and justice, included the need for:
- honest, capable state institutions genuinely committed to improving the lives of the poor;
- a corporate sector which sees the need to add value to society beyond maximising profits;
- effective civil society organisations capable of representing the interests of marginalised groups;
- greater transformation and accountability of existing institutions and elected officials;
- increased participation and engagement of ‘ordinary’ people with policy makers at all levels, including through use of social media platforms; and
- a comparative study to explore the role of courts and judges as constitutional activists in other parts of the world.

\(^{16}\) Solange Rosa – A human-rights approach to poverty and inequality: Participation at the core [235]

\(^{17}\) Danie Brand, Stephen de Beer, Isolde de Villiers & Karin van Marle – Poverty as injustice [35]
CHAPTER 3

Unemployment

The third dimension in any consideration of poverty and inequality in South Africa is, of course, unemployment. Social grants for children and pensioners have done much to alleviate some of the worst poverty at the bottom income levels, but only the generation of more jobs will enable South Africa to tackle adequately poverty and inequality.

In one of the first plenary sessions at the conference on ‘Unemployment, the formal sector and life at the margins’, Kuben Naidoo stressed the NDP’s priorities in terms of growth and employment and underlined the need to improve capabilities of the people and the country, build on existing advantages and diversify on that base as productivity growth in the tradable sector will generate few jobs directly and many jobs indirectly.¹

This has, of course, long been understood – not least by economists, who were first alerted to the scale of the growing problem over 30 years ago in a pioneering paper by Charles Simkins.² He showed that unemployment had doubled between the beginning of the 1960s and the end of the 1970s: from an average of 9.5% (1961–1963) to 19.4% (1977–1979).

At that time the focus was primarily on establishing the facts and there was a lively debate amongst economists about definitions and statistics. A decade later, economists were divided between those who acknowledged the reality of unemployment in the country and a vocal minority whose analysis suggested that those who remained unemployed did so because they were unwilling to accept available jobs at lower rates of pay – in other words, that those without jobs chose ‘voluntarily’ to remain unemployed. But the findings of the second Carnegie Inquiry, with its devastating case studies of just what unemployment meant to individual households and work-seekers, effectively demolished the latter line of argument although the

¹ Kuben Naidoo was Head of the Secretariat to the National Planning Commission until September 2012, and has been on secondment from the National Treasury to the Development Bank of Southern Afrika (DBSA). In April 2013 he became Advisor to the Governor of the Reserve Bank.

question of the impact of labour costs and productivity on employment at a macro level is one that needs to be teased out further.

When the new democratic government came to power in 1994 it was under no illusions as to the growing problem of unemployment in the country. The following table, drawn from data collected nationally in 1993, indicated the scale and the peculiarly South African complexity of the problem: two of every three black youngsters aged 16 to 24 who wanted work could not find it, and 40% of black adults were unemployed, whilst only 5% of whites were in the same situation. This was the economy inherited by the new democratic government. These figures used the broader definition and included ‘discouraged’ workers, those who considered themselves unemployed even although they had not actively sought work in the previous week.

Whilst the South African economy has, in fact, created thousands of jobs since 1994 this has not always translated into a reduction of unemployment. One reason for this is that large numbers of women – in the old ‘Bantustans’ and elsewhere – who did not consider themselves unemployed and/or who were originally registered as ‘child carers’ rather than as work-seekers have subsequently

Table 1: Unemployment in South Africa, 1993

<table>
<thead>
<tr>
<th>Category</th>
<th>Apartheid Classification</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Black</td>
<td>Coloured</td>
</tr>
<tr>
<td>Male</td>
<td>34</td>
<td>17</td>
</tr>
<tr>
<td>Female</td>
<td>44</td>
<td>25</td>
</tr>
<tr>
<td>Rural</td>
<td>42</td>
<td>10</td>
</tr>
<tr>
<td>Urban</td>
<td>35</td>
<td>26</td>
</tr>
<tr>
<td>Metropolitan</td>
<td>34</td>
<td>19</td>
</tr>
<tr>
<td>Age: 16–24</td>
<td>65</td>
<td>41</td>
</tr>
<tr>
<td>Age: 55–64</td>
<td>20</td>
<td>9</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>39</strong></td>
<td><strong>21</strong></td>
</tr>
</tbody>
</table>

clarified that they are looking for paid work and thus are part of the army of unemployed. Statistically, the unemployment (narrow definition) rate rose dramatically between 1995 and 2002, from 15.1% to 30.4%. Whilst the working age population grew by 2.3% per annum during these years, the strict labour force – in the sense of people in jobs or actively looking for work – grew at 5.6% per annum. Thus the country remains burdened with a structure of massive unemployment that underpins the poverty and inequality with which we are wrestling.

From Miriam Altman’s overview we know further that: “There was a strong relationship between GDP and employment growth between 2001 and 2008 when employment expanded by 2.4 million or an average of 300,000 jobs annually ... The unemployment rate\(^3\) fell from about 30% down to 23% over this period.”\(^4\) Then, over the course of the global downturn in 2008 and 2009, and for reasons that have yet to be analysed satisfactorily, the South African economy shed 1.05 million jobs, despite the fact that there were only relatively small changes in macro output during this period. Then from the end of 2010, employment began to pick up with 365,000 extra jobs created by the end of 2011, by when the ‘strict’ unemployment rate was 23.9%.

It is against this background that the Research Project on Employment, Income Distribution and Inclusive Growth (REDI) was being formulated at exactly the same time as the Carnegie3 process began to take shape. Whilst Carnegie3 was stimulated into existence at the request of and with support from the National Planning Commission in the Office of the Presidency, the Research Project – designed as a national collaborative, independent research initiative – was stimulated and funded by the National Treasury which, in turn, was very supportive of the Carnegie3 process. Through the work of the Research Project, based at Saldu and lead by its director, Murray Leibbrandt, and Frederick Fourie from the University of the Free State, a number of papers focused specifically on unemployment were submitted to

\(^3\) Narrow definition excluding discouraged workers [eds.]
\(^4\) Miriam Altman – The challenge of employment creation in South Africa [7]
the conference at which the Project was officially launched. At the same time a dedicated website was established with a carefully structured forum to encourage critical debate (see www.econ3x3.org). In its own words, the website publishes accessible research-based contributions and expert commentaries with a view to encouraging debate on an integrated and consistent policy response to unemployment, inequality and poverty and a stronger engagement between research and policy making. From the perspective of the Carnegie3 process, REDI and the Econ3x3 Forum are building a powerful network of South African (and other) social scientists promoting dialogue across disciplines and paradigms to deepen our understanding of the dynamics of employment and unemployment, incomes and social outcomes and, notably, the interconnections between these three areas.

One of the most important points to emerge from this work so far is clarification about the measurement of unemployment. Heavy artillery has been brought to bear on a widely cited commercial data set that virtually eliminates the problem, whilst from a third university comes persuasive evidence that the most accurate figure for unemployment should include those generally defined as ‘discouraged’ workers.

The bottom line would thus seem to be that over the 20 years between 1993 and 2012 the rate of unemployment, including discouraged workers wanting work but not actively searching for it, has increased significantly – from approximately 30% to approximately 36% despite a considerable increase in the number of jobs generated by the growing South Africa economy during this period. Clearly a huge challenge remains.

The result of the intense debate, refinement of questionnaires and detailed survey work during the 1990s and the first decade of this century enable us to draw the following reasonably firm conclusions at this point:

- Any realistic measure of unemployment in South Africa should include potential workers previously defined as ‘discouraged’;
- Apart from the years of the global downturn (2008–2009) the country has been reasonably effective at generating new jobs since 1994;
- But not effective enough – during these years

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5 Big guns located at both the universities of Stellenbosch and Cape Town include Servaas van der Berg and Martin Wittenberg whose articles on the Econ3x3 website have reduced much of the statistical edifice of the Adcorp Employment Index to rubble.

many more people came onto the labour market, not only because of population growth but also because of people (notably rural black women) previously excluded from active participation in the political economy; and

- Thus, the unemployment rate (including discouraged workers) remains unacceptably high, averaging well over 30% with younger people in their 20s or even 30s experiencing a labour market that offers scant hope of their ever finding a job.

Another important insight into the nature and dynamics of unemployment in the country comes from joint work by Data First at UCT and StatsSA. From their investigation into the creation and destruction of jobs by industrial firms (excluding mining and agriculture), the authors report that:

*We find that around 10% of existing jobs are destroyed each year, while the number of new jobs created each year accounts for around 9.5% of existing employment. Thus we find that around 20% of the total of formal jobs outside agriculture and mining are either created or destroyed in each year [this is the gross reallocation rate]. Since the available data indicate that we underestimate the number of jobs created by births and reallocation [because small firms at the sample changeovers are not indicated], this reallocation rate is comparable with those found in other countries .... These results mean that there is a relatively high amount of reallocation of employment across firms. This suggests that there may be lower rigidities in the South African labour market than is sometimes believed [especially with reference to the effects of labour legislation].*

Further work on this aspect is clearly needed but these early findings suggest that labour market rigidity may not be the major barrier to increasing employment that various critics of current labour legislation have suggested.

Another paper dealing with the dynamics of the labour market comes from analysis of the first two waves (2008 and 2010) of the National Income Dynamic Survey where Cichello, Leibbrandt and

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8 Paul Cichello, Murray Leibbrandt & Ingrid Woolard, Labour Market: Analysis of the NIDS Wave 1 and 2 Datasets, NIDS [51; Discussion Paper 2012/1, revised 20 August, 2012
Woolard are able to use the NIDS data to examine the labour market under the microscope, so to speak. Although the data can analyse change only over a limited two-year period, the results are interesting. As more NIDS surveys are undertaken in future years we can expect far deeper understanding, based on empirical analysis, of exactly who moves in and out of jobs and why. The rigour of the work also throws up important questions concerning the quality of data and new ways of tightening quality control. All of which serves as a salutary reminder that the scientific collection of national data sets is South Africa is still very young. With time the quality of data should improve through more sophisticated and sensitive questionnaires, more experienced and better trained field-workers, and as there will be longer runs enabling analysts to assess more systematically the nature of changes taking place over time. The support by South Africa’s democratic government for the collection of quality data both by the state (StatsSA) and by independent research units has been crucial in deepening our knowledge of the facts and our understanding of the dynamics at work in the country over the past 20 years. Continued support for more and better data is vital in the years ahead.

Reinforcing the argument for more and better data (but not only of a statistical nature), sociologist Jeremy Seekings built on earlier work with Nicoli Nattrass that drew attention to a number of social cleavages in the society. In particular he referred to the “underclass”, households with unemployed members and without any members either working or earning significant income through business activity. There were, of course, unemployed persons living in households where one or more persons were already working but the underclass was defined as much by their lack of social capital (i.e. connections) as by their unemployment. The underclass generally also lacked the human capital of education and skill, and was concentrated in rural areas where employment opportunities were minimal. The paper analysed

As more NIDS surveys are undertaken in future years we can expect far deeper understanding, based on empirical analysis, of exactly who moves in and out of jobs and why

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survey data and more qualitative research to show that a significant minority of youth remain trapped in long-term unemployment, excluded from the labour market through a combination of factors. The consequences of this social stratification remain unclear: what happens to these young people in their thirties or forties?

Moving more deeply behind the statistics, important thinking about the psychological consequences of unemployment came from the University of South Africa where the author\textsuperscript{10} considered the role of employment in providing not only basic needs (such as food and shelter) but also latent needs, "\textit{including social contact and status, enforced activity and keeping to time structures.}" When these are not fulfilled, he argued, the impact on the unemployed individual may be even more important than the loss of basic needs. When this loss is combined with the stress caused to individuals from living in a poor urban environment with overcrowded housing, fear of violent break-ins, inadequate sanitation and refuse removal, the impact on self-efficacy can lead to a learned helplessness where people have poor outcome expectations, which makes finding a job even more difficult.

One new response to the challenge of massive youth unemployment was described by Rumbidzai Goredema from the DG Murray Trust.\textsuperscript{11} Drawing on the success of using mobile technology to facilitate access to employment in India and Palestine, the initiative creates a platform connecting employers and work seekers. In India, Babajob connects up to 1,000 work seekers every day, with over 900,000 jobs posted by employers in three years. The idea is beginning to take root in South Africa, where over 75% of 15–24 year-olds have access to a cell phone. Mobile technology is already being utilised creatively to address a wide range of social issues from social networking (eg. MXit, which boasts almost 50 million users) to access to information (eg. MYMsta, created and run by loveLife, provides information about

\textsuperscript{10} Michael Leary – The role of self-efficacy and the environment on the propensity to be employed [149]

\textsuperscript{11} Rumbidzai Goredema – Facilitating Connection to Opportunity: Implementation Stories from the Creation of a Mobile Opportunity Mediator [95]
HIV, educational and employment opportunities and access to a trained counsellor). Other mobile applications seek explicitly to facilitate entrepreneurial activity: Flash, the Cell C based application, allows users to buy and sell electricity and airtime vouchers, and make a profit. Nomanini, a similar application, allows users to sell airtime and earn a 5–6.5% profit. (Further imaginative ideas for the use of new digital technology in combating poverty and inequality, not least in the field of education, are explored in Chapter 6.)

Another paper which looks beyond statistical analysis is by Shari Daya, who examines the social enterprise craft sector. Economic agency, she points out, should not be reduced simply to job creation or income generation: “Questions of power must be raised.” Econometricians are generally uncomfortable with such questions and tend to ignore them. Yet they are very important and the presence of this contribution, ‘Bringing in the social: Power and agency in the social enterprise craft sector’ is a splendid illustration of the value (and difficulty!) of interdisciplinary research.

Moving back to the more purely theoretical economic level, Frederick Fourie of the University of the Free State argued that three core discourses or clusters (with some sub-clusters) can be distinguished in the unemployment debate: a labour market cluster, a poverty and development cluster, and a macro/macro-sectoral cluster. It is highly unlikely, he argues, that one discourse can provide the analytical insights and policy options necessary to lead to a significant reduction of unemployment (and poverty) in South Africa. The paper explores the outlines of a conversation towards an integrated understanding of the macroeconomic, labour market and developmental dimensions of unemployment. Such a rich integration of insights and models, Fourie suggests, is essential for policy making in overarching departments such as the Treasury or for the Cabinet.

Whilst comprehensive in its inclusiveness and solid in its building on previous theoretical foundations, it would be safe to say that this is still a model under construction.

A second paper on unemployment research was by Fourie and Leibbrandt. On the basis of identified gaps in existing knowledge, their paper maps

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12 Shari Daya – Bringing in the social: Power and agency in the social enterprise craft sector [64]

13 Frederick Fourie – The South African unemployment debate: Three worlds, three discourses?

14 Frederick Fourie & Murray Leibbrandt – Unemployment: State of Knowledge, Gaps and Research Priorities for an Integrated Approach to Unemployment [85]
out a long list of research priorities. The paper argues that the outcomes of a research agenda that draws on insights from all the discourses could lead to more successful, multi-pronged and integrated policy responses regarding unemployment, poverty and inequality.

To this is added thinking from another paper, this one by Fourie and Burger, which argues for a macroeconomic framework that incorporates the diversity of economic activities ranging from the formal sector to the informal sector and survivalist activities and thereby provides a suitable basis for macroeconomic policy in the peculiar South African context. They illustrate the framework by deriving a novel three-segment model that explicitly incorporates a primary sector (formal sector?), the secondary sector (informal economy?), and a tertiary (survivalist?) segment, as well as labour market entry and mobility barriers.

The authors identified many different theoretical questions that need tackling,15 including:
• The proper treatment of the self-employed, notably outside the formal sector/professions, remains a major analytical gap and inconst-
ency in various models, and reflects the failure to deal with those that are unemployed but somehow survive;
• The need for new theory on price setting/formation and wage setting/formation in the secondary sector under various conditions;
• Using efficiency wages as a potentially important way to incorporate worker motivation and productivity also at the lower end of wage spectrum. Another question would be whether there could be something like ‘inefficiency wages’ that are set too low and induce inefficiency and low productivity?
• Whether the fairness model may be a potentially important way to incorporate perceived fairness and entitlement as determinants of South African labour market behaviour; and
• Is there a substantive and important segmentation within the formal sector, e.g. between a corporatist and a market sector – and what could be its macroeconomic and employment implications?

At the same time there are many other dimensions of the poverty and inequality conundrum – not least education, health and public infrastructure – where further thinking about effective policy is also required. Thus, moving forward, we see two

15 Philippe Burger & Frederick Fourie – Macroeconomic policy and South African unemployment: Multiple segments and an agenda for research [40]
broad (but inter-connected) streams of intellectual activity in this area over the next few years. One is a set of mini-workshops flowing directly out of the September 2012 conference. The other is the work (noted above) stimulated by the Research on Employment, Income Distribution and Inclusive Growth (REDI) project, including some early papers which were submitted to the conference and subsequently published for discussion on the www.econ3x3.org forum.

Unemployment – the numbers game

Until 2007, in the bi-annual Labour Force Statistics [LFS], StatsSA did publish both the strict and the broad unemployment rates, even though the former had an ‘official’ status. When, in 2008, it switched to the quarterly publication of labour market statistics [the QLFS] it simultaneously, and without explanation, stopped publishing or mentioning the broad unemployment rate and publicly communicated only the strict rate to the media, who followed suit. Discouraged work seekers, or the non-searching unemployed, were counted but categorised as ‘not economically active’ and therefore not as unemployed. In this way the unemployment problem was suddenly ‘reduced’ markedly. The QLFS did, though, in 2010 start to show statistics for an ‘expanded definition of unemployment’ – but only in the appendices to the QLFS. It should also be noted that, while doing so, StatsSA redefined their expanded definition to produce a sudden downward step, between 2007 [the end of LFS] and 2008 [the start of QLFS], of approximately 800,000 people in the expanded, or broad, count of unemployment. This wasn’t explained either. At the end of 2012 there were approximately 3.1 million non-searching unemployed and 4.5 million searching [official] employed [QLFS data]. The strict [official] rate of unemployment was 24.9% and the expanded rate 35.9%.

Dorrit Posel, Daniela Casale & Claire Vermaak

– The Unemployed in South Africa: Why are so many not counted?
During the second half of 2012 two major eruptions of violence involving workers occurred in the country. One, during August, was near Marikana in the heart of the platinum mining industry; the other, near De Doorns, spread out from the centre of the prosperous fruit and wine farming area. This is not the place to enter into either a description or an analysis of these events – although each in its way takes us to the core of the challenges of poverty and inequality, linked to unemployment and decent work, with which the country is wrestling. Marikana clearly is a wake-up call to policy makers and to all those seeking a better way forward that the linkages between the migrant labour system – as practiced in the mining industry for over a century – and poverty in the rural areas, especially in the old ‘Homelands’, need to be fundamentally rethought. This is an issue scarcely touched upon in the NDP and it is one which received scant attention from the researchers present at the September conference. Agriculture (including of course land reform), on the other hand, received considerable attention both in the NDP and in the research coming from the universities.

The NPC's draft NDP states that one million new jobs can be created in agriculture and related industries over the next two decades, mostly through labour-intensive forms of small-scale farming in communal areas and on redistributed land, with many engaged in irrigated farming. The Commission suggests that there is potential to expand the area under irrigation from 1.5 million hectares to 2 million hectares, and asserts that market opportunities exist for increased production of fruit for export and vegetables for the domestic market, as well as niche crops such as nuts, olives and berries which are small-scale and labour-intensive in character.

These targets for smallholders are clearly very
ambitious, given that the total number of black households engaged in small-scale farming has remained at more or less the same level over the past decade and a half, and that land reform is widely acknowledged as not having created conditions for successful small-scale farming to date. Are they feasible? Skeptics abound – on the grounds that there is little evidence (in the South African context) to support the view that smallholders are highly productive, or that land reform has reduced rural poverty. Two key problems hinder policy debates. The first is the paucity of reliable and detailed empirical data on small-scale farming in South Africa, in particular farming engaged in by land reform beneficiaries. The second is conceptual: what exactly is meant by the terms ‘smallholder’ and ‘small-scale farmer’?

Here, clearly, is an area requiring major work and it is reassuring to note that some three dozen of the papers and presentations at the conference tackled some aspect of farming and need to be read carefully by policy makers. It is simply not possible in a Guide of this nature to do justice to this body of work. Suffice it to point to the papers presented and urge interested readers to probe more deeply. Whilst the material presented did not, by any means, cover all the issues there was much food for thought.

There were essentially three areas of focus. The first considered primarily small-scale agriculture, with a particular emphasis on new models – not all of which fitted neatly into the usual definition of ‘small-scale’. Many of these are actual examples of new ideas and models that are working and much excitement was generated in the sessions at which these were presented. The second set of issues could be grouped under the general theme of ‘food security’, whilst the third devoted attention primarily to the question of ‘land reform’ in the new South Africa. Let us look briefly at the various ideas that were contributed.

New models

Amongst the most striking of the new models of agriculture were three linked to the Department of Agriculture at the University of Fort Hare:1 one producing milk; one producing vegetables to be dried and used for soup in schools and hospitals; and one finding ways to upgrade the small herds of Nguni cattle in rural areas of the old ‘Homelands’.

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1 J Every, L Mavhungu & J Rikhotso – Bridging the gap between small scale agriculture and sustainable commercial agriculture creating new jobs and bringing about sustainable transformation in agriculture [80]
The Fort Hare Dairy Trust, working in partnership with commercial farmers organised in Amadl elo Agri, seems to have found a way of overcoming obstacles to the creation of economically successful dairies within the complex contexts of the old Reserves.\(^2\) In terms of the 1913 Land Act what came to be called Reserves was the land, comprising some 7% of the area of the country, which was reserved for black occupation and ownership whilst the rest of the country was kept primarily for white private ownership. Further legislation in 1936 increased this area to 13.7% of the total. (In terms of apartheid policy these Reserves were further consolidated – but not significantly increased in size – as ‘Homelands’, often called ‘Bantustans’, which in turn evolved politically into ‘Black National States’.)

And these are not small-scale operations: the first at Fort Hare runs 800 cows; the second at Middledrift has 600 cows; and the third and fourth, in Keiskammahoek and Shiloh (near Queenstown), are no smaller.

Completely different conceptually, but no less innovative, is the new model being developed at Fort

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\(^2\) By 1990 Transkei, Bophutatswana, Venda and Ciskei (TBVC) were technically independent with their own presidents, parliaments and passports.
Hare for small-scale vegetable growers to become part of a network for the production of nutritious soup for school feeding. The core of the operation is a depot or Ilima agri-park located on the university campus, which receives fresh vegetables. These are washed, sliced and steam cooked, dried in ovens heated by solar panels and then scientifically mixed to provide packets containing different types of soup which are very light and can be stored and transported easily.

Preparation of the soup then requires no more than the addition of boiling water. The soup is delicious, nutritious and remarkably cheap. The two chief difficulties constraining the immediate roll-out of this model seem to be at the bottom of the supply and the top of the demand chain.

**New farm in Middledrift**

In Middledrift 65 land right holders\(^3\) agreed to consolidate their different pieces of land into a single grazing unit in return for a profit share. The commercial farmers of Amadlelo Agri, which itself has a profit share in the farm, provided expertise for preparation and sowing of the land, and purchased the equipment. The crucial right to draw water for irrigation from the adjacent rivers was negotiated by the university with the relevant authorities. Not a simple matter! Capital was borrowed from the Land Bank and other agencies; cows were provided by Amadlelo Agri from the herds of commercial farmers; training of the pool of people from whom the farmers to run each farm were selected was provided by the Department of Agriculture at the University of Fort Hare. Farm workers were hired from the adjacent villages and, perhaps most important of all, a continual process of support and mentoring was provided by a combination of Amadlelo Agri and the University. The results are there for all to see. In Middledrift, for example, a thriving farm with 600 cows exists in a rural area where there has been little serious agriculture for two or three generations. The whole operation in managed by a young woman in her mid-twenties who came from northern Limpopo Province for training at Fort Hare. She employs 12 farm workers and a commercial dairy collects the milk every day for transport to the main marketing depot in Port Elizabeth. The share of different stakeholders in the fruits of the enterprise has been negotiated in advance and include the manager being able slowly to build up her own herd as part of the process thus giving her a direct interest in the success of the venture.

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\(^3\) Land tenure within the old Reserves is, as we know, exceedingly complicated but for the purposes of current analysis we use the concept of Land Right Holders, which embraces a wide variety of forms of legal access: quit-rent; private ownership; permission to occupy (PTO) etc.
A process of agricultural extension service needs to be put in place to encourage and assist the expansion of vegetable production in surrounding villages, and on the demand side the politics of ensuring that the relevant government departments – Education, Agriculture and Health – provide the school-feeding funds to enable schools to buy the soup is not straightforward. This is particularly so in an environment where corruption is rife and school-feeding funds are often seen as easy pickings by some bureaucrats.

Fort Hare’s third agricultural model is the Nguni project which helps rural villages in the Eastern Cape improve the quality of their cattle with a view to nurturing a more thoroughbred animal with potential for developing a niche market in low-cholesterol beef. Negotiations with local communities are undertaken to supply thoroughbred bulls which, with careful management to ensure no contamination by local bulls, will gradually improve the village herd and hence increase the asset base of these villages. Whilst difficult to monitor and measure, there are promising signs of progress.

Similar to the Nguni model, and possibly even more successful at this stage, is the process being run by the National Wool Growers Association (NWGA) with some 10,000 participants, more than 50% of whom are described as “black communal and emerging farmers”, working primarily in the old ‘Homeland’ areas of the Eastern Cape and KwaZulu Natal, as well as in the Free State. This is producing some 12% of the national wool clip of 45 million kg, with over 90% exported.4

There are some 846 communal wool producing areas in the Eastern Cape alone, with a wide range of facilities. The task of the NWGA’s wool sheep development programme in these areas is to help upgrade basic infrastructure, including dipping tanks and shearing sheds, and to train and assist farmers in the various skills needed to improve their stock through genetic breeding, sort wool and marketing practices. The net result has been spectacular – in the 14 years from 1997/98 to 2011/2012, the

Wool development is (and was) an important catalyst for rural economic development in South Africa for more than two centuries and is also a vehicle for capacity building, skills transfer and poverty alleviation

Leon de Beer

4 Leon de Beer – The Wool Sheep Development Program in communal areas of South Africa [65]
Dialogue on Rural Development

Government too has been experimenting with innovative ways of enabling rural communities to use land more productively. A plenary session on Day 1, chaired by Wilfred Wentzel of Origilime, and using powerpoint presentations, looked at the Comprehensive Rural Development Programme (CRDP) initiated by the Department of Rural Development and Land Reform (DRD&LR). The CRDP is third of 12 priorities set for the Medium Term Expenditure Framework, with plans to extend roll-out from 8 sites in 8 provinces since 2009, to 160 sites by 2014. Moshe Swartz of the DRD&LR explained the three phases involved: meeting basic human needs, investment in bulk infrastructure as driver of entrepreneurial development and promotion of SMMEs and village markets. He outlined the active role played by the Ministry in some of the pilot sites, engaging in site visits and local consultations, and undertaking detailed household surveys. The Department also established the National Rural Youth Service Corps, which sends rural youth for life skills training in FET colleges with the aim of “putting a job in every home”.

In a presentation entitled, ‘Rural youth: From grim statistics to human assets’, Wilfred Wentzel described how this is being achieved through participatory, empowering, community based development. He claimed the PRA methodology is employed to investigate the “micro-macro nexus” that exists due to policy and implementation needing to be synergised. He highlighted that rural economies are ‘bleeding’ due to debt and purchases taking social grant money out of the area. He cited the importance of corporate research for inventing new prototypes of ‘organisational practices’, including assessing the appropriateness or relevance of public-private-partnerships in improving delivery of the CRDP. His reference to “Ubuntu calculus” as a form of organisational learning was inspired and highlighted how qualitative social profiling is underappreciated as a method as compared to quantitative profiling. He ended by stressing that youth need support for their existing skills to display their organisational capacities and emphasise the importance of teamwork.

Xoliswa Jozana of the DRD&LR also discussed the CRDP with particular focus on its impact on youth. She explained in detail how rural youth trained in these methods applied PRA in their own villages, and spoke of some of the challenges these young people had identified – included a lack of economic, educational, social and recreational opportunities and facilities. She argued that the culture of agricultural production is not embedded in youth today, and stressed the need to restore that culture in our youth.

The plenary concluded with vigorous discussion and some sharp critique of the Department’s approach to rural development. Some of the questions raised and debated were: Why is the CRDP so divorced from the NDP? Are these programmes sustainable? How can the programme be scaled up and implemented effectively to address the systemic failure of institutions? How can the current approach of village-level pilots be rolled out at the macro-level? What is the future of rural areas in South Africa in terms of the so-called “brain-drain” to urban areas and dual households? Why are rural universities not recognised for what they offer – crucial
begin to see the potential of small-scale agriculture for transforming the lives of significant numbers of poor rural households.

Completely different from the wool grower programme, but no less successful, is the Timbali Incubator, located just outside Nelspruit in Mpumalanga Province. Louise de Klerk, the founding director, made a presentation – in a session which generated a lot of excitement – about work at the Incubator (see www.timbali.co.za). Here is another idea with apparently huge potential for wealth generation, not least by women without high levels of education and in rural areas. The Incubator consists of a highly capital-intensive infrastructure which individual women are trained to use and then hire to grow top quality flowers under careful supervision. The flowers are marketed together under the single label, Amablom, which is bought by top of the range customers throughout the country. Operating successfully since it was founded in 2003, Timbali sees itself realistically as able to expand to create over 150,000 jobs. The secret is that the individual producers are rewarded for their own skill and efforts, whilst they are part of wider structures (for which they pay) including irrigation, advice and marketing. At the same time, training and mentoring are central and ongoing. Perhaps more than any

**Hein Gerwel**

**Guide to Carnegie3 – CONFERENCE REPORT**

linkages with the rural economy?

Rural development requires a massive national strategy to keep money circulating in rural areas, rather than the current situation in which money and skills leave for urban areas. We need to see government’s implementation plan for dealing with economic underdevelopment in rural areas. There was a sense among some discussants that the DRD&LR is interpreting its mandate of rural development not as driving a national strategy, but rather becoming a ‘parallel government’ for the former ‘Homelands’. The key question remains how to scale-up from specific experiences in a way that is relevant to a national rural development strategy. In other words, how to link micro-level implementation with macro-level planning? Hein Gerwel

total amount of wool sold by communal farmers through the commercial auction process rose from 0.2 million kilograms to 3.6 million kg, and the income from wool for these farmers rose from R1.5 million to R113 million. In terms of the development economist’s jargon, this is Asset Based Community Development (ABCD) at its most effective. When the results of this programme are seen together with similar processes including cattle (www.mngcunube.co.za), fruit trees and other high value crops in the Integrated Village Renewal Program (www.isbaya.org) – neither of which participated at the Conference – one can
other agricultural project in the country, Timbali raises the question of what is meant by ‘scale’? Are the individual flower growers small-scale farmers? Like Danish pork producers – organised in a highly successful co-operative system – they farm small areas but, at the same time, they are part of much larger structures whose scale is determined by what works best. In marketing, for example, economies of scale are such that for national (or international) name-brand recognition big is beautiful. Part of Timbali’s skill lies in determining the most efficient, effective and manageable scale that is appropriate for different stages of the production process. A second vegetable agri-park is being developed in Limpopo Province for production of high-quality vegetables, by mainly women who are able to access suitable land in the Vhembe district.

Still in Limpopo, John Mudau and Vhonani Netshandama of the Centre for Rural Development and Poverty Alleviation at the University of Venda sought to determine the effectiveness of government-funded income generation projects in agriculture in the province.\(^5\) A qualitative-quantitative case study food security projects (interviewing 108 beneficiaries) suggested that 90% were in fact contributing both to poverty and hunger alleviation but as yet there has been no cost-benefit analysis of these projects to test their long-term sustainability.

Two other papers widened the scope of the agrarian agenda. Pauline Stanford’s study\(^6\) of 16 commercial (white-owned) dairy farms in the Underberg district of southern KwaZulu-Natal provides a very useful context within which to understand the possibilities and constraints of the Fort Hare-Amadlelo innovations discussed earlier.

Casting his net more widely than the somewhat special case of South Africa itself, Raymond Auerbach drew attention to the experience and research elsewhere in the continent – including in the 14 Millenium Villages Project of the Alliance for a Green Revolution in Africa (AGRA), which stretch across the

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\(^5\) John Mudau & Vhonani Netshandama – Evaluation of funded income-generating projects: A case of government-funded agricultural projects in Limpopo [191]

\(^6\) Pauline Stanford – “Grow bigger or sink”: farm scale and dairy farmers’ responses to economic pressures [250]
tropical part of the sub-Sahara from Senegal in the north west to Malawi in the south east.\(^7\) Launched in 2005, the immediate results of the project have been dramatic with, inter alia, a trebling of maize yields from 1 to 3 tons per ha. But Auerbach raises an important question about long-term sustainability when he compares the project with the no less successful Export Programme for Organic Products from Africa (EPOPA) and South African experiments in organic maize production, using crop rotations, mulches and other conservation practices rather than mineral fertilizer. He suggests that there would be much to be gained if the two groups were willing to learn from each other as he points out that AGRA has helped farmers by setting up maize storage facilities and assisting them to open bank accounts, while EPOPA’s grassroots approach is cost-effective and can be easily scaled up.

In this context a paper from Walter Sisulu University in Umtata provided an illuminating insight based on a comparative study investigating the utilisation of African indigenous vegetables and farming methods in food security and nutrition in Tsitas Nek (Lesotho) and Mabeskraal village (South Africa).\(^8\) Critical and systems theories formed the theoretical framework and the philosophical background for this study. The findings revealed that both communities depended on African indigenous vegetables such as Theepe (Amaranthus), Tenane (Wahlengergia androsacca), Rothoe (Cleome cynandra) and Morogowwa-Dinawa (Vigna unguiculata) for food security and nutrition; secondly, they used indigenous as opposed to conventional farming methods for cultivation of African indigenous vegetables because they are cost-effective, environmentally friendly and sustainable. Furthermore, knowledge, techniques, socio-cultural protocols and skills of cultivation of indigenous vegetables using African indigenous farming methods lie with the elders. The domination of modern intensive, profit-oriented farming methods tends to marginalise sustainable indigenous farming methods that have the potential to promote biological diversity. In the final analysis, the author argues that both modern intensive and African indigenous farming methods have limitations and strengths. Researchers from the School of Social Sciences and Development Studies at Walter Sisulu University presented on the perceptions and attitudes of rural communities towards the

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7 Raymond Auerbach – Transforming African agriculture: Organics and AGRA [15]

8 Libopuoa Notsi – African indigenous farming methods: A comparative study of Tsitas Nek (Lesotho) and Mabeskraal Village (SA) [206]
Trench farming in Queenstown, Eastern Cape (pic: courtesy of Khululeka)
use of indigenous leafy vegetables\(^9\) and indigenous seeds in promoting food security in South Africa.\(^{10}\) Hence, the integration of both systems in ensuring food security and nutrition in rural communities is pertinent.

Somewhere between the large-scale dairy farms of rural KwaZulu Natal and the intense urban agriculture of Cape Town lies another innovative model that was on display at the Conference’s ‘Festival of Ideas’, located in the foyer. This was the Goedgedacht Path Out of Poverty programme (POP) (see www.goedgedacht.org), which has been astonishingly successful over 20 years in developing a process to rebuild, one child at a time, the broken households and communities characteristic of so many South African farms, particularly in the Western Cape.

Turning to marine resources, Merle Sowman et al. presented on poverty alleviation amongst the country’s small-scale fisheries.\(^{11}\) Since 1994 there has been a significant shift in the governance of small-scale fisheries in South Africa – from a largely resource-centred approach towards recognising their role in poverty alleviation for smaller scale operators. However, it is not clear that the tension between fisher rights and environmental sustainability have been resolved yet.

**Food security**

Jane Battersby of the African Centre for Cities at the University of Cape Town argued that urban food insecurity poses an increasingly important challenge in South Africa, but that we lack adequate policy and governance mechanisms to address it.\(^{12}\) The progressive realisation of the right to food cannot be met by household food production and social safety nets alone. Appreciation of the wider food system and its connection to processes of social, spatial, political and economic exclusion is essential. She called for an explicitly urban food policy and for responsibility for the realisation of the right to food to be partially devolved to the city scale. Christopher Manyamba and colleagues at the International Water Management Unit addressed some of the contribut-

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\(^9\) Vuyiswa Taleni, Phefumula Nyoni & Nomalungelo Goduka – People’s perceptions on indigenous leafy vegetables: A case study of Mantusini location of the Port St Johns Local Municipality, in the Eastern Cape, South Africa [260]

\(^{10}\) Kholekile Ngqila, Mlamli Tsi & Nomalungelo Goduka – Perceptions of rural farmers on the use of indigenous seeds in promoting food security: A case study of Lwandile location of Ngqeleni, Nyandeni Local Municipality, in the Eastern Cape, South Africa [265]

\(^{11}\) Merle Sowman, Jackie Sunde, Serge Raemaekers & Oliver Schultz – Fishing for equality: Policy for poverty alleviation [248]

\(^{12}\) Jane Battersby – Urban food security and the urban food policy gap [18]
ing factors to inequalities in food security in South Africa, and the implications for agricultural policy.¹³ The paper began by highlighting problems with current mechanisms to measure food security/insecurity. Using a series of secondary data, the paper demonstrated that although we are food secure at the national scale, there is massive household food insecurity, and identified key drivers as migration and urbanisation, HIV/AIDS, inadequate safety nets and food price increases. The paper stressed the need to move beyond a focus on food production to consider directly issues around access.

Too often academics and policy makers are pushed towards proposing solutions too quickly, without fully understanding the problem. The Southern African Food Lab creates a space for learning and sharing, drawing in actors from academia, business, government, NGOs and communities. Their presentation described food insecurity as a ‘wicked’ problem in scale, scope and complexity, requiring innovative approaches to address it.¹⁴ Ann Steensland of George Mason University shared case studies from two multi-sector efforts to transform food systems in the United States, which brought together representatives from government, business, academia, civil society, NGOs, and religious communities, using rigorous, data-driven analysis and planning models to identify innovative solutions to specific local problems.¹⁵ She drew on these studies to suggest potential best practices and lessons for South Africa, particularly in relation to the work of the Southern Africa Food Lab.

Another presentation shared the experiences of a UNISA distance education programme on household food security, taught in six modules linked to the objectives of the Integrated Food Security Strategy.¹⁶ In this course, students are linked to households in the Eastern Cape and food solutions are co-generated with the needs and desires of the households central to decision-making. The programme is yielding some success, but the extreme poverty characterising the area has caused some challenges. It was stressed that these kinds of initiatives do not replace the need for social grants.

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¹³ Christopher Manyamba, Sheryl Hendriks, Pius Chilonda & Emmanuel Musaba – Factors contributing to inequality in food security in South Africa: Implications for agricultural policy [169]
¹⁴ Fostering innovation for sustainable food security: The Southern Africa Food Lab – Milla McLachlan, Ralph Hamann, Vanessa Sayers, Candice Kelly & Scott Drimie [179]
¹⁵ Ann Steensland – Creating a “hunger free community”: Multi-sector coalitions working to reduce hunger and malnutrition [252]
¹⁶ Maggi Linington – Training community facilitators in household food security [powerpoint]
Projects like the Southern African Food Lab and the UNISA programme are process-driven and time-intensive. This kind of work is hard to put to funders and sometimes hard to ‘sell’ to actors in the system who have limited time and require quick solutions that are easily implementable.

There is growing interest in urban agricultural schemes, as was demonstrated through two case studies. Amy Thom presented on a vegetable box scheme in Cape Town, showing its potential for market inclusion of disadvantaged urban farmers and making practical suggestions to address current obstacles and barriers limiting urban agricultural development.17 Gareth Haysom shared a case study of the Philippi Horticultural Area, also in Cape Town, and demonstrated the lack of appreciation of the role of food in the wellbeing of the city.18 He argued that the food system is not designed to meet the needs of most citizens and that no-one in local government has capacity or mandate to address the food issue. The paper also called for a review of the food system at the urban scale, and the design of governance structures and strategic interventions accordingly.

In discussion following these presentations, it was agreed that while food insecurity has many drivers, it is itself an acknowledged driver of some of the key challenges addressed in the wider conference. There was particular focus on the physical and cognitive developmental impacts of food insecurity and malnutrition. If we fail to address maternal and infant nutrition efforts to improve and widen access to education may be wasted. Concern was also expressed about how we define and measure food security. This was not just a case of academic ‘navel gazing’ – the way we define and measure reflects the underlying ideology and shapes the approaches and solutions we adopt.

The session called for a broadening of the understanding of food security beyond merely production, and the inclusion of an explicit urban focus. There are still substantial research gaps, particularly questions that need to be addressed through

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17 Amy Thom & Beatrice Conradie – Sustaining urban agriculture’s socioeconomic impact: The potential of vegetable box schemes in Cape Town, South Africa [266]

18 Gareth Haysom – Food governance and the city: A case study of the Philippi horticultural area, Cape Town [109]
interdisciplinary research that extends beyond the academy. There are existing partnerships and networks working on these issues that need support and to be extended. Voices from the room identified the importance of peer review publication, and yet a bias toward pure disciplinary research in local journals hinders this approach. Further, academic departments and SAQA place limitations on interdisciplinary teaching – an example was provided of a course in Sustainable Community Agriculture that was removed from an Agriculture degree course because it was social science.

**Land reform**

Horman Chitonge asked ‘can land make a difference?’ A household survey in Chris Hani District in the Eastern Cape compared those from the communal areas who got land through land reform and those who didn’t. The focus was on Emalahleni and Sakhisizwe local municipalities (around Elliot and Cala). Differences can’t necessarily be attributed to having land, though there was an attempt to ensure that the land reform and control groups were broadly comparable. Land reform projects were varied themselves, with some being large group projects, while others were family projects. Among non-beneficiaries, some had inherited, been allocated (by chiefs) or even bought their own land, while others were landless. Although civil servants are not eligible, some are getting land through land reform. More beneficiaries than non-beneficiaries own livestock (and own more livestock) but interestingly, fewer were involved in crop production, the reason apparently being that land beneficiaries do not live on the farms they’ve been allocated, and so cannot produce labour-intensive crops that require frequent attention. In this study, 10% of land beneficiaries were deriving no income at all (very different from 90% project failure rate cited by the Minister). Beneficiaries were less likely to be poor than non-beneficiaries but, among those who were poor, the poverty gap was higher (i.e. the poor among land beneficiaries are poorer than the poor among non-beneficiaries), suggesting that some land projects are targeting the better off, while others are targeting the poor. Chitonge argued that policy implications are to focus on the poor rather than to focus on those who are generally better off, as seems to be the case currently.

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19 In the section on Land Reform we have drawn heavily from three reports on conference sessions written by Ruth Hall available as blogs on www.carnegie3.org.za

20 Horman Chitonge – Can land make a difference? (powerpoint presentation of an article co-authored with Lungisile Ntsebeza)
Michelle Hay provided a short history of a situation in Mopani District, Limpopo, where land claims have conflicted with the desire of farm dwellers and others to secure their land rights. Restitution has created a stalemate in development: because of pending claims, redistribution cannot proceed. Competing claims include those between different groups of people, and different authorities now claiming to represent the same groups. There was very little formal land ownership by black people prior to 1913 and most people accessed land on privately owned farms, state farms and farms owned by land companies – there was great diversity in how people accessed land, and this was not (as seems to be assumed now) in some idealised tribal units. Historical research shows that rights to land prior to forced removals were previously strongest at the household level, not at the community or chiefly level, yet restitution is restoring land to groups as if they shared land, and lived in coherent groups under traditional authority structures. The way the claims are being dealt with, those who arrived first (and are considered ‘original’ owners) have stronger rights to claim than ‘latecomers’; in Mopani, this translates into Sotho and Venda people having stronger claims than Tsonga people. The latter then are suggesting that they should be paid out compensation, as they are not aiming to return to the land, and feel robbed of their right to restitution.

Doreen Atkinson spoke about municipal commonage, the land owned by municipalities that can (and should) be made available for poor people to use. This is an important public good, and should be promoted through the land reform programme. Commonage development can be an important part of agrarian reform in rural towns as it builds local multipliers and multiple livelihoods. And in this regard there is a need to align national, provincial and local institutions. There is a need for a new policy on commonage and a necessity to revitalise the debate about commonage as a viable option to accommodate land reform.

Karin Kleinbooi addressed the much-neglected issue of farm workers and farm dwellers living on privately owned farms, and the tenure rights they are supposed to have under Section 25 of the Constitution and related laws. Despite the development...
of progressive legislation to protect farm dwellers’ land rights in the immediate post-apartheid period – the Extension of Security of Tenure Act and the Land Reform (Labour Tenants) Act – in practice government has failed to enforce these laws. In its draft Land Tenure Security Bill published in 2010, the Department for Rural Development and Land Reform portrayed ‘agrivillages’ as a ‘win-win’ solution to the problems of tenure insecurity, eviction, and poverty faced by farm dwellers. Instead of addressing tenure insecurity on farms, it proposed off-farm settlement in agrivillages as the way in which to provide security of tenure to farm dwellers. But a proper strategy, linked to the NDP, is needed to consider farm labour and farm tenure in a more integrated way.

Ben Cousins\textsuperscript{24} addressed communal tenure, and the crucial question of how secure the situation is of nearly a third of all South Africans who live in the ex-Bantustans. This is a major policy vacuum at present. He discussed the failure to address communal tenure and the abortive attempt to do so through the Communal Land Rights Act of 2004, which was declared unconstitutional in 2010. The Traditional Leadership Framework Governance Act, the Traditional Affairs Bill and the Traditional Courts Bill reflect political and state support to cultivate relationships with chiefs and to delegate powers to traditional leaders in the administration of land and to deliver the rural vote.

During discussion it was suggested that all aspects of land reform – restitution, redistribution and tenure reform (both on commercial farms and in communal areas) – have been complex to conceptualise and implement, largely because the power relations involved are so stark and the mechanisms so laborious. On a positive note, substantial learning is now available on what the difficulties have been. While new research may be desirable, existing research can help to shape new strategies for land reform if the right fora exist for engagement.

Another wide-ranging mini-plenary session saw panelists debating the impacts land and agricultural policies have had on poverty and inequality, and how the ‘agro-food system’ has changed in ways quite antithetical to concerns with land and agrarian reform. Cherryl Walker called for a more nuanced understanding of the history of the countryside and what this means for where we are going.\textsuperscript{25}

\textsuperscript{24} Ben Cousins – Communal land tenure reform and the politics of ‘tradition’ [56]

\textsuperscript{25} Cherryl Walker – Grounding “effective land reform” for 2030: Past, present and future considerations [288]
Smallholders and Agrarian Reform

Some idea of the liveliness of the various panel discussions at the conference may be gained from this condensed report of four presentations and the debate which flowed from them. This one on the first morning, Tuesday 3 September.

Who are the ‘smallholders’ that the NPC envisages as the focus of its strategy to produce a million new jobs in agriculture? Panellists pointed to the choices about whether development of this sector will involve broad-based ‘accumulation from below’ or picking winners, what kinds of support services are needed, how they can be delivered, and how smallholders can access markets. The core message is: there are choices about the class agenda of this target to intensify smallholder agriculture, and the choices made now will determine who wins and who loses out in the process.

Nick Vink argued that the failure of land reform is the result of a failure of farmer support. The only way to integrate the ‘two agricultures’ (commercial large-scale and small-scale in ‘communal areas’) is to implement Farmer Support Programmes (FSPs) alongside flexible land markets. What type of farming development model and support schemes are needed? We should look at varieties of contracting, outgrowing, equity schemes, and shareholding; we must prioritise access to farmland and secure property rights through land reform; and restructure the institutional support framework. Now there’s a need to bring in industry bodies and establish public-private partnerships.

Ben Cousins called for a path of ‘accumulation from below’. Government targets are to create 300,000 smallholder opportunities by 2020, and the NDP set the target of a million new jobs in agriculture, especially from smallholders, expanded irrigation, and new labour-intensive crops. How feasible are the targets? There is 500,000ha of irrigable land – but some people in the water sector dispute this, and there are debates about whether agriculture (which already consumes 70% of the country’s water) should be further prioritised to this extent.

We already have 200,000 smallholders and medium-scale commercial farmers; they should be the focus of a broad-based programme of ‘accumulation from below’ and should be the priority of government and private-sector programmes. At Tugela Ferry irrigation scheme, smallholders are very productive smallholders, producing maize mostly for market and a wide variety of vegetables, which are sold all over KwaZulu-Natal. The scheme is 100 years old, it is labour intensive, extension staff played a key role in the success. Land is intensively used. The old ‘labour reserve’ economy must be transformed. For accumulation to take place on a significant scale, we need redistribution of land and water, and resettlement, to enable emergence of successful smallholders to fill the ‘missing middle’.

In another contribution, Albert Modi of the University of KwaZulu-Natal’s School of Agricultural,

26 Nick Vink, Johann van Rooyen & Mohammad Karaan – Farmer Support Programmes: Lessons from implementation [129]

27 Ben Cousins – Smallholder irrigation schemes, agrarian reform and accumulation from below: Evidence from Tugela Ferry, Kwa-Zulu Natal [57]

28 Albert Thembinkosi Modi – Local knowledge is key to rural development in agriculture: A KwaZulu-Natal case [185]
Earth and Environmental Sciences, presented findings of a study using participatory rural appraisal (PRA) to survey small-scale farmers of the Tugela Ferry irrigation scheme. The findings demonstrated the importance of local knowledge as a key to rural development, and were confirmed by improved crop production and independence in decision making by these farmers.

Davison Chikazunga\textsuperscript{29} reported on a survey in Limpopo which showed that smallholder farmers tend to have multiple marketing strategies, ranging from supermarkets, local and national fresh produce markets, local formal retail, and local informal roadside markets, and often combine multiple marketing strategies – only 7\% of those surveyed managed to sell to supermarkets. The data from this survey suggests that net incomes to farmers are better when selling to processors or to local markets than to supermarkets. Spar, a franchise store, is a positive example since it is procuring from smallholder black farmers. Hawkers then buy from Spar, and sell informally. There are successes in informal markets too. At Tshakuma informal market on the way to Thohoyandou, supply of fresh produce by black smallholder farmers to this market has created 50 jobs in the market itself though SA is lagging behind East Africa in terms of applications of ICTs to small farming.

When thinking about strategies to link farmers to markets, then, we should appreciate the role of informal markets and examine how to support these – they are more accessible, costs of access are lower, they are employment-creating, and they enable money to circulate within the rural areas.

Donna Hornby’s research\textsuperscript{30} was in the Bester’s area of northern KwaZulu-Natal where there are ‘labour dormitories’, very densely settled rural areas, and where, in the commercial land adjacent, 14 were transferred (as Communal Property Associations – CPAs) to 183 households of labour tenants at a cost of R36 million, or R197,000 per household. This might perhaps be defined as ‘accumulation from above’. Did it succeed in ‘commercialising’ them? Hornby’s research suggests that the households are highly (and over time increasingly) differentiated, as are their uses of land and resources with which to farm, especially ownership of cattle (ranging from zero to 250 per household).

Group-based farming enterprises always involve conflicts over how the profits get split. Getting institutional arrangements right is one of the big lessons from the difficulties in land reform projects. A major use of cattle is for ceremonies and in marriage (as lobola), as well as for commercial sale.

What we see emerging through land reform is neither commercial farming, nor household production for consumption – it’s generally a hybrid, as shown in this case. There are serious environmental constraints, but some CPAs are reinvesting in production and maintenance while others are paying out as much as possible, and hoping government will intervene with further funds in the future.

\textsuperscript{29} Davison Chikazunga & Gaynor Paradza – Smallholder farming: A panacea for poverty alleviation and employment creation in South Africa? Lessons from the Pro-poor Value Chain Governance Project [48]

\textsuperscript{30} Donna Hornby – Hybrid livestock systems on land redistribution projects in KwaZulu Natal: Reproduction/accumulation dynamics and social differentiation [115]
Discussion centred on the recognition that policy should not focus on a class of full-time farmers. Rather, household-based agricultural enterprises among ‘petty commodity producers’ involve tensions between consuming and reinvesting in the enterprise – and this must be acknowledged. Even in the face of large corporate agribusiness, small farmers are making a go of it in a difficult market environment, and usually with little or no external support. Scaling this up and making it more profitable should be the focus of policy.

Success stories tend to involve either irrigation or livestock – dryland cropping is what people rely on as an adjunct to non-farming based livelihoods. The goal must be increasing the contribution of farming to rural incomes, some of which may be reinvested in farming, enabling accumulation. Other sources of income may help the process, and social grants, remittances and wages might support this.

Agriculture is a cheaper way of creating jobs than any other activity – but aiming for full-time farming is a pipe dream for policy if the aim is to reduce poverty and inequality, as it is only possible for a small elite. Large numbers of rural households who are so excluded economically could be supported, on a part-time basis, to ‘accumulate from below’, if we were to redirect the focus and logic of redistributive land reform, and agricultural support programmes.

To reach the NDP target (even to start to think of approaching it!) we need to think about scaling up on the basis of some of the successes with small-scale irrigation schemes.

South Africa is not the predominantly agrarian society it once was, even though a substantial proportion of the population continue to live in rural areas and specifically in the ex-Bantustan districts. We need to distinguish between those who are already or are willing to commit to an agriculturally-based livelihood and tailor the offerings of land reform accordingly. There is potential through restitution to craft land claims settlements that are imaginative and forward-looking in how they conceptualise alternative forms of redress where appropriate – and not only land restoration.

Given our history of racialised land dispossession, land reform is not merely a matter of rational policy making and economics; the current debate is highly emotive and politically charged. If the reduction of rural poverty and inequality is the primary objective of land reform, then we need to tease out the distinctions between its material, symbolic and political dimensions. A lot of the national political rhetoric collapses this complex matrix into a very flat redistributive imperative. The ‘master narrative of loss and restoration’ is insufficiently grounded in history and current realities. The 87/13% divide and the map envisaging this was a blueprint of the 1936 Development Trust and Land Act, and we’ve reinterpreted this as if
it were achieved, which it was not. The narrative also marginalises urban dimensions of dispossession and those who are not ‘African’. There is a need for a regionally fine-grained analysis, rather than blanket national understandings of who has what. Among the variations are ecological conditions and the concentration of people (the ‘rural poor’ included) along the eastern seaboard within the high rainfall regions of the country. There are demographic dimensions; our population is 10 times what it was in 1911 and, while there has been urbanisation, in absolute terms, the rural population has grown significantly. The ‘rural dividend’ (in the form of white economic accumulation) has migrated to urban areas a long time ago; it makes no sense to expect current farmers to shoulder the cost of redress for the past. While we have a national picture of land reform and valuable case studies, there is a need for regionally-located analysis and strategies. The chapter on rural and agrarian development in the NDP needs further discussion and refinement.

Stephen Greenberg argued that land reform policy continues to act against the possibility of small-scale agriculture. There remains a deep scepticism among political leaders and state officials in land and agriculture about the role and potential of small-scale farming. From 1994, the dominant approach was that small-scale farming was ‘yesterday’s economy’; land reform was largely a welfare poverty-alleviation effort, while food production would be left to industrial agriculture. From 2000, the approach shaded into an ‘agriculture to reduce poverty’ approach, combining welfare and the modernisation of agriculture. For commercial farms, the focus has been on employment and labour relations within the current structure, rather than restructuring. In 2007, the Polokwane resolutions seemed to introduce new ideas about ‘room in the shade’ and focused on integration into formal value chains. Now, though, government is ‘tailing’ the retailers, who are embracing this on their own terms, calling for public funds to enable

If the reduction of rural poverty and inequality is the primary objective of land reform, then we need to tease out the distinctions between its material, symbolic and political dimensions

Cherryl Walker

31 Stephen Greenberg – The Disjunctures of Land and agricultural reform in South Africa: Implications for the Agri-Food System [powerpoint]
them to procure from smallholders, and enabling aggregation of produce to feed into these formal value chains – rather than challenging the nature of the chains themselves and those who dominate them. Agricultural policy involved the privatisation of the cooperatives and corporate expansion; the reduction of public support for research and development, extension and finance; and trade and investment policy that connected South African agriculture to what Philip McMichael (2005) terms the global ‘corporate food regime’. For now, land reform and agricultural policy favour large-scale commercial farming and corporate agriculture. The modernisation paradigm accepts the obsolescence of small-scale farming. If there is to be a contribution to reducing poverty and inequality, there is a need for a radical break in this trajectory.

Ruth Hall argued that land redistribution has been ‘reinvented’ through three policy cycles, broadly correlated with the presidencies of Mandela, Mbeki and Zuma.32 Policy under President Zuma is essentially state purchase and leasing of whole commercial farms to individuals / small groups to continue with operations, under the Proactive Land Acquisition Strategy (PLAS, 2006-present). This latest phase entails highly permissive policy without any clear mechanisms to ration resources, and with no publicly available data on who is getting what. The failure to subdivide large farms, and the insistence on ‘commercial’ and full-time production, are inappropriate to the objectives of reducing poverty and inequality; in practice, those with capital to invest are being prioritised and the pro-poor and pro-smallholder vision has been abandoned. Because of the prioritisation of those able to take over going concerns, and the absence of wider agricultural policy change, as currently configured, land redistribution will not make a contribution towards the NDP target of one million jobs in agriculture.

Mazibuko Jara placed emphasis on the continued importance of agriculture to livelihoods even though this is declining through job losses; though the sector accounts for less than 3% of the GDP, as part of a larger agro-industrial complex it makes up over 9% of GDP, 10% of exports, and is a major (self)employment sector. Spending on agriculture declined dramatically from 1980s to 1990s. Scenario planning shows the potential of a mixed smallholder path combined with support of semi-subsistence farmers. Further work building from the scenarios, and working out further detail (including regional detail) is needed. Strategic

32 Ruth Hall – The reinvention of land redistribution: Three cycles of policy 1994-2012 [100]
choices emerge from the work done thus far on scenarios for the future: either we can pursue a survivalist path where small farmers keep as they are doing but produce a larger share of household food (‘food security without accumulation’); or we pursue, as is being done at present, the commercialisation of a smaller number of small farmers (‘accumulation by a few’); or we could look towards an alternative path, of improving what many small farmers are doing combined with increased productivity, scaling up, diversification of products, and raised incomes (‘accumulation from below through diversification’). The latter is what we must consider and explore in more detail in line with the NDP.

Four areas need rethinking. First, land restoration as the blanket response to land claims: there is a need to distinguish between those who are already or are willing to commit to an agriculturally-based livelihood – and tailor the offerings of land reform accordingly (eg. more imaginative ways of dealing with restitution). The NDP chapter on rural and agrarian development needs further debate and refinement, to create regionally-attuned strategies. Second, the land redistribution programme has narrowed: it now provides more money to far fewer people, with preference being given to those with some capital. This means that land reform is not contributing to economic restructuring and making little if any contribution to the NDP target of one million jobs in agriculture. Land reform needs to be thoroughly rethought if it is to reduce poverty and inequality. The Green Paper gives no direction on core questions, and there is now an urgent need to link the Green Paper to the NDP. Third, agricultural support institutions are providing in/direct subsidies to the corporate sector, while largely ignoring small-scale farming. For example, the Agricultural Research Council’s research agenda on germ plasm is directed towards the needs of large-scale producers, only 3% of the Land Bank’s loan book goes to small-scale farmers, while most small farmers never see an extension officer. The modes of delivering support, the targeting of support, and the content of support all need rethinking in a linked-up way. Fourth is the question of how all of this can support food security for rural and urban areas. Small-scale farming is too often seen as a cost to the ‘cheap food’ agenda, but the concentration of control throughout the agro-food system means that at present few corporations are profiteering off both the rural and urban poor. This suggests an urgent need to explore localisation of production and distribution – especially in the context of the current mounting energy crisis.
and rising transport costs, which pass on costs to consumers and aggravate food insecurity.

What new **roles and partnerships** does all this suggest? It was noted that there has been an immense amount of research on land reform, and yet the policy environment seems quite impervious to being informed by this. If government is willing to take this issue on board (and there is some scepticism as to whether this is the case), then researchers are willing to partner to do the research that is needed.

Between government and researchers there are three priority areas for partnership: first, monitoring the Proactive Land Acquisition Strategy to find out who’s getting land, why, how are they doing, what livelihood creation is resulting, is it value for money, who’s getting left out and why. Second, there’s a need for serious collaborative work on specifying where the potential is for intensifying land uses and livelihood creation through redistributing land and water rights. Third, there’s a need to deepen existing initiatives on scenario planning to clarify the trade-offs involved with redistribution of large-scale commercial farms to small-scale farmers, growing concentration, expansion of agro-processing, etc – not all of these are compatible.

Scenario planning needs to help clarify what **agrarian structure is being envisaged for 2030?** But there is also a need for broader partnerships, including practitioners and civil society organisations, to map a new direction on tenure reform (the most ‘stuck’ of all the land reform programmes), which involves confronting the recent conservatism and ‘re-traditionalisation’ of the countryside evident for example in the Traditional Courts Bill. Another priority area is identifying the constraints of the ‘agro-food system’ for entry of smallholders, to locate (in terms of sectors and geography) where changes to the regulatory environment are needed to avoid small farmers being ‘locked out’ of value chains.

Finally, there’s a need to draw together partnerships to develop innovative and regionally-focused smallholder support systems involving provision of generic support and infrastructure in areas of high concentration of small farmers doing similar types of production (often on a part-time basis) – this would obviously need to focus initially on just a few districts in the Eastern Cape, KwaZulu-Natal and Limpopo, which are where most black smallholder farmers are located. Geographic targeting could have magnified impacts in these districts and help to turn around these regions of some of the poorest ex-Bantustans by stimulating new local multiplier effects through smallholder agriculture.
CHAPTER 5

Urban and Environmental Challenges

In a rapidly urbanising society such as South Africa, in the quarter century since the abolition of the pass laws in 1986, the availability and quality of housing is one of the major issues facing poor households. Forty years ago one of the country’s most far-seeing engineers¹ pointed out that there were three requirements for any normal family homestead. In order of priority the house needed:

• To be close to work
• To provide water, both laid on and laid off
• To provide shelter.

This, of course, explains why millions of people have moved from the countryside to live in cities, even though the temporary shelter they may be able to erect is inferior to the homes they leave behind. This process of migration also places huge pressure on local municipalities – to provide adequate urban transport, water, sanitation and shelter.

Since 1994 the South African government, at all levels, has been scrambling to meet this triple challenge, which was itself exacerbated by apartheid’s Group Areas planning and the huge backlog in urban housing inherited as a result of that government’s unwillingness to facilitate or support building of family homes in the towns on the grounds that the majority of the population (defined as ‘Black’) did not belong in the cities and should return to their rural ‘Homelands’.

Urban transport remains a major problem but considerable progress, although not enough, has been made with regard to the provision of water to – and disposal of sewerage from – the rapidly growing population. Some 2.4 million subsidised housing units were built around the country between 1994–95 and 2006–07.²

¹ Gerrit Marais in a lecture to SHAWCO students at UCT c.1970
² Republic of South Africa, National Treasury, Publications 2007. chap 5, table 5.5
However, increasing concerns have been raised about both the quality of many of these houses, their location – often on the far outer edges of both cities and smaller towns – and the lack of social cohesion and sense of ‘ownership’ amongst their occupants.

In view of the central importance of housing and the housing environment in the lives of poor households, especially those trying to eke out a living in the big cities, it was surprising how few papers were submitted to the conference on this theme. However, we know that major work is and has been done in rethinking the rebuilding of urban communities in projects whose experience may well provide important guidelines for future government policy and practice.\(^3\)

The NDP contains a chapter focusing specifically on “Transforming human settlement and the national space economy”, in which it makes clear that “the state will review its housing policies to better realise constitutional housing rights, ensure that the delivery of housing is to be used to restructure towns and cities and strengthen the livelihood prospects of households”. At the same time government policy is being dedicated to “respond systematically to entrenched spatial patterns across all geographic scales that exacerbate social inequality and economic efficiency”. This will require some major revision of many de facto housing policies since 1994, which have effectively entrenched even further the highly unequal urban spatial patterns inherited from apartheid.

Bovain Macnab of the Suburban Housing Action Campaign gave a presentation highlighting administrative gaps in the emerging urban residential property sector that perpetuate inequality and poverty, and suggested a practical solution. The paper proposed municipal licencing of entry-level housing through (minor) national legislation as a path to attain formal title.\(^4\)

But there have also been some highly imaginative schemes, led often by independent non-governmental initiatives, which point to the huge potential that may be realised in future by matching private imagination with public resources. Of the various experimental models from which the country may learn we would note just three – all in the Eastern Cape.

The first, in Walmer not far from the Port

\(^3\) A 2012 World Urban Forum meeting in Naples coincided with the Carnegie3 conference and meant that the rich work being done, for example, by UCT’s African Centre for Cities, is not reflected here.

\(^4\) Bovain Macnab – Stroke of a pen: a costless R150 billion reduction in poverty and inequality [162]
Elizabeth International Airport, is Sakhasone Village, which was initiated by the General Motors South Africa Foundation working in collaboration with the Nelson Mandela Metropolitan Municipality and the Department of Housing. Managed by a Community Trust, the village is a fully subsidised housing project aimed at the poorest members of society. Its innovation lies essentially in the design and the process of its creation which involved extensive consultation with potential residents. The double-storey semi-detached dwellings are bigger than the standard Reconstruction and Development (RDP) houses, but occupying less land in a much safer interactive environment than is usual for such housing schemes. A major contribution is the reduction of urban sprawl and integration of the poor households closer to their place of work in the existing urban environment. The project is one which drew on and used many of the lessons derived from the roll-out of low-cost housing in previous years.

The second, in East London, is Amalinda Village built by Sohco – a social housing company – which is aimed at those households who earn too much to qualify for a low income (RDP) house such as in Sakhasone Village but too little to be able to rent or pay the mortgage on an available house or...
Starting in East London, with support from the Flemish government, Sohco Amalinda Village has built some 600 residential units since 2001, with 50% of the residents taking up the Rent-to-Buy option. It is now also building in Durban and Cape Town. As with Sakhasonke, the innovation of Amalinda lies in the professionalism, intelligence and imagination with which it has been planned and executed. Solidly built flats and houses are, in the words of its web-site:

*close to potential places of work, public transport systems, shops, clinics or hospitals, and schools. Communal facilities (eg. children’s playgrounds, parking garages, braai facilities) have also been built; HIV and AIDS peer educator and life-skills training has been provided; and the housing village provides a referral service to other social welfare agencies. A mobile library provides service to the complex; and a Mobile Clinic visits the site when launching special awareness and education campaigns.*

Working at different levels of household income, both Sakhasonke and Sohco’s Amalinda have created living communities, integrated into their urban environments, which are far more than simply housing units set down in empty space on the distant periphery of big cities.

Also aimed at the gap market – but with more significant government involvement – is the Walmer Link affordable housing scheme for households which cannot afford independently to access mortgage finance to acquire a home. Brokered by the GMSAF the scheme has led to the development of the Finance Linked Individual Subsidy Programme (FLISP) of the Department of Human Settlements, which is then added to the home loan finance provided by banks for qualifying beneficiaries to buy or rent one of the homes built under the scheme. Thus far 3,000 people have been housed in the Walmer Link project and building on the second stage has commenced. Pioneered in Port Elizabeth the idea is being rolled out, with government support, in several other parts of the country including Lady Selbourne, Nelmapius, Bohlabela Borwa, Cosmo City and Fleurhof in Gauteng, Intabazwe Corridor Housing in the Free State and Seraleng in North West. More ambitious still, but not yet off the drawing board, is an integrated community housing project – also in Port Elizabeth – aiming to build homes for households across four different levels of income from zero to a monthly R15,000.

Rolling out schemes of this nature would do
much to begin to overcome the fearsome geographic divide between rich and poor generated by apartheid. But imagination for the healing of urban communities is needed as much, if not more, in the places where people are already living as it is required in the design of new settlement projects.

Cape Town’s Violence Prevention through Urban Upgrading programme (VPUU) applies a systemic approach to transforming apartheid dormitories into sustainable neighbourhoods, based on the concepts of negotiated solutions with residents and communalisation of services.  

Working in one of the most violent hotspots in Harare Township with 40,000 residents, through active involvement with the community and targeted investment in public space, the VPUU saw the murder rate in the area reduced by 35% in the first five years, and the number of users of the new library increase from zero to 76,000 in its first four months. At the same time 9,000 persons (94% of them women), received intensive support after incidents of gender-based violence. Clearly this is a model which could be replicated in different urban areas around the country.

The reasons for the success of the VPUU model lie in the interaction between residents and the local municipal government, and relationships with local academics and their applied research. Some insight into this was provided by Tom Sanya in his presentation, ‘Participatory design of public space’. Working through a consultant organisation, Sustainable Urban Neighbourhoods, and “borrowing from the Scandinavian active welfare approach”, the academics contributed in development of a project which drew on people’s capabilities to design and construct a small public space within Monwabisi Park in Khayelitsha informal settlement.

The reality of violence, particularly but not only in urban areas, was spelt out further in three papers which provided insight into the depth of the problem. The first of these put violence under the microscope, as it were, by considering the life of one young man growing up in the township of a

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5 Michael Krause – Violence prevention through upgrading [142]

6 Tom Sanya – Participatory design of public space [237]
Kuyasa pilot energy project, Khayelitsha (pic: courtesy of Kuyasa Clean Development Mechanism)
large South African city today. The paper examined the intersection of physical violence, structural violence, and masculinity through his experiences. Beginning and remaining with his life history narrative, the paper shows how the gendered physical violence between young men in townships emerges from historical and present-day structural violence – here defined as institutionalised power inequalities that limit life opportunities – and argues that structural violence needs to be discussed and addressed as a policy issue in South Africa. Author Jasmina Brankovic suggests that researchers and other stakeholders would do well to focus on the institutionalised marginalisation that fosters socioeconomic inequality as a form of state violence.

Scientific evidence, based on hard statistics, on the proximate causes of violence is difficult to obtain. However, recent analysis has made it possible to begin tracing the intergenerational transmission of violence in a society where it is estimated that one in four children experience interpersonal violence at home. Using data from Cape Town, Duncan Pieterse explored evidence for the intergenerational transmission of violence mediated by alcohol. Association does not of course imply causation but the data does show that children with a parent who is a problem drinker during childhood suffer adverse consequences in terms of exposure to violence during childhood and are at increased risk of problem drinking and the perpetration of violence later in life.

In a second paper at the conference, Pieterse presented findings of research on the impact of violence on children’s education. The findings show clear evidence that children who are exposed to violence during childhood suffer adverse consequences in this critical area, including a higher probability for dropping out of school.

Proper housing and decent, crime-free, private and public space are key requirements for people living in cities. But there are many more. Assuming for the moment that there are jobs available, the three most important are water (both laid on and laid off), transport and energy.

As far as energy is concerned Peta Wolpe and her co-authors from Sustainable Energy Africa began by pointing out that a strategy of ‘Growth’ would not by itself be of great assistance to those

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7 Jasmina Brankovic, Leave the Gangster Things to the Boys Growing Up Now: A Young Man’s Experience of Physical and Structural Violence in a Cape Town Township [36]

8 Duncan Pieterse – Intergenerational transmission of violence [217]

9 Duncan Pieterse – Impact of violence on education [216]
mired in poverty. The NDP proposes that GDP per capita should more than double between now and 2030, but the proportion of income earned by the lowest 40% is only projected to rise by 4%, and the Gini-coefficient is only set to drop from 0.7 to 0.6, while requiring GDP annual growth of 5.4%. So, the question the authors ask is – who is this growth for? A very valid question. With that background, the authors focus on the fact that South African cities are hugely resource inefficient with carbon footprints far larger than bigger, richer, European cities such as Paris or Berlin. They attribute this inefficiency to three factors: the current unequal spatial form of cities; inadequate public transport provision (to enable mobility of the poor and reduce carbon footprint); and electricity provision to informal settlements, despite some impressive initiative to provide electricity to these areas, barriers relating to integration of informality within the city continue to hamper these efforts.

To improve access and mobility in South African cities there is a need to transform and restructure the current transport system, and improve public transport. An effective and affordable public transport system is key to reducing the dependence of the city on fossil fuels and lowering the carbon footprint, in addition to having important social benefits. The cost of an upgraded public transport system is however high. Cities may struggle to find this money, yet significantly improved public transport facilities are essential to a sustainable city. Experience in South American cities indicates that the costs of public transport are double per passenger-km in sprawling cities compared with dense cities. Thus looking ahead to 2030 and beyond, long-term planning of sustainable cities, with a drastically reduced carbon footprint per person, requires restructuring cities to a far denser settlement pattern along with reduction in the daily use of motor cars for commuting and massive investment in public transport. One presentation explored the potential of bicycles and bicycle empowerment centres to address this problem as part of a low carbon development strategy for the City of

An effective and affordable public transport system is key to reducing dependence fossil fuels and lowering the carbon footprint, in addition to having important social benefits.
Cape Town, designed with the poor at the centre.\textsuperscript{11}

So much for the big picture and vital planning needed for the longer run. Meanwhile down at the household level, policies for enabling low income households to have better, cheaper access to energy include subsidisation of electricity. Consideration of other alternatives including use of biogas were analysed in a number of papers, including three from the Energy Research Centre and the University of Cape Town and one from the Cape Peninsula University of Technology (CPUT) Energy Institute.

The first paper drew on Alison Hughes’ Ph.D. thesis and considered access to energy in Sub-Saharan Africa, where access to electricity and modern fuels remains low.\textsuperscript{12} Traditional biomass, particularly woodfuel, remains a predominantly rural fuel, although charcoal use is high in many urban centres. A major problem with burning biomass in open fires is the smoke, which seriously affects health. Poverty is the largest barrier to the use and uptake of modern fuels and appliances, particularly in rural communities. This presentation examined the continued use of woodfuel in rural areas, looking at changes in energy use in two Mpumalanga communities since electrification, exploring alternative fuels in terms of energy cost and access, and the opportunities for and costs of modernising woodfuel use.

A paper from the CPUT Energy Institute confirmed that, despite significant electrification of households since 1994, many of the major energy services in poor households are still met by traditional fuels such as coal, paraffin and wood.\textsuperscript{13} Their use is associated with a range of concerns – from chronic respiratory tract infections to asphyxiation by carbon monoxide and massive fires that destroy homes and lives. State interventions such as the provision of Free Basic Electricity are costly and do not appear to be contributing towards solutions. In this presentation, Phillip Lloyd assessed the challenges in household energy provision and proposed a range of mitigations. John Parkin, Deputy Head: Plant & Engineering at eThekwini Municipality, presented on Durban’s Gas-to-Electricity project, and some of the lessons learnt in implementing this project.

The option of state subsidisation of electric-

\textsuperscript{11} Michael Boulle – Grounded low carbon development strategies in Cape Town: The role of bicycles and Bicycle Empowerment Centres [33]

\textsuperscript{12} Alison Hughes & Gisela Prasad – Energy access: Where are we going in Africa [117]

\textsuperscript{13} Phillip Lloyd – Challenges in household energisation: the neglected poverty factor – of the Energy Institute, Cape University of Technology [155]
ity was considered by Mamahloko Senatla, who analysed how the three metropolitan municipalities in Gauteng administer free basic electricity to households, and its effects on the livelihoods of poor households.\textsuperscript{14} The paper concluded with suggestions for how municipalities can improve their targeting methodology, hence improving on implementation of free basic electricity.

The question of alternative energy, in both rural and urban areas, was raised in a number of papers based on the empirical observation that even when supplied with electricity most poor households cannot afford to use it for cooking. Wood biomass is the fuel of choice and even in urban areas it is widely used when there may be more efficient options available, notably biogas and solar cookers.

Naik and von Blottnitz investigated various versions of biogas technology and suggest that small-scale bio-gas could play a special role in poverty alleviation through energisation of informal urban Africa. However, the authors also point out that woodstoves can be improved to use 20 to 50\% less fuel and cut emissions by 40\%. Clearly there is room for significant improvements, in terms of both cost and environmental pollution in the use of energy for cooking.\textsuperscript{15}

After fire, water. A paper from Cape Town’s Environmental Monitoring Group sheds light on the interface between city planners and bureaucrats on the one hand, and households with very low incomes on the other.\textsuperscript{16} The authors address two critical problems: how to ensure that water is paid for, and how to reduce loss of water through leaks and faulty taps. The bureaucratic response has been to roll out 45,000 Water Management Devices (called Amafudo or Tortoises because “they hide in their shell and we can’t see what is going on inside”). For many reasons, spelled out in the paper, this attempt at water management has failed – not least because it has created enormous mistrust.

But there is a deeper problem. The authors argue that poor households are the main target of city-led water conservation and water demand management strategies, often experienced as punitive and unjust. In their words, “They are heavy-handed debt recovery strategies in disguise. Technical interventions are favoured over more nuanced social

\textsuperscript{14} Mamahloko Senatla – Implications of energy subsidy policies on sustainable livelihoods of the poor in Gauteng [241]

\textsuperscript{15} Linus Naik & Harro von Blottnitz – Poverty alleviation via energisation of informal urban Africa: A special role for small-scale biogas? [193]

\textsuperscript{16} Jessica Wilson & Taryn Pereira – Water demand management’s shadow side: Tackling inequality and scarcity of water provision in Cape Town [295]
responses, eroding the already dysfunctional relationship between citizens and local government ... There is undoubtedly an element of discrimination in the way in which poor households are the targeted recipients of punitive water demand management strategies. This is evident in Cape Town, as well as other South African municipalities. It is a discrimination built into the political economy of local government, where those who can pay are treated better than those who cannot. Cost-recovery itself is discriminatory in a country with such high income disparity."

Some city officials genuinely believe that the water management device is a ‘holistic solution’ – that it helps the City manage debt, saves water, helps people identify leaks quickly, and gives people a way out of debt, and therefore, presumably, a way out of poverty. But this reveals a limited understanding of poverty and of what is required to overcome it. Apart from the many direct ways in which amafudo make people’s lives worse – including by restricting their access to water and being a source of confusion and conflict – the very notion of using a piece of technology (complete with tamper-proof wires) to regulate and limit household water use reveals a short-cut mentality, and a mentality of control at any cost. It keeps people in a state of frustrated dependence. Having choices is a key element in overcoming poverty.

Although focused on water, the essence of the EMG argument is that good governance in a democratic society requires active participation by all concerned in a spirit of genuine partnership. It is a process which the VPUU has been pioneering elsewhere with the Cape Town City Council, as discussed earlier in this chapter.

An important attempt to “give voice to the poor” has been led by the Isandla Institute in Cape Town through a process of inclusive dialogue on urban transformation using the internationally-derived ‘Right to the City’ discourse. Parallel processes saw members of the urban poor and urban NGOs engage with, and produce a document on their understanding of, the ‘Right to the City’ in a South African context, and the policy and practical implications. Their presentation shared the strengths and weaknesses of this approach, and suggested what is needed to inspire and support the ‘active citizenship’ the National Planning Commission describes as the centrepiece of the (future) developmental state in South Africa.

17 Tristan Gorgens & Mirjam van Donk – Exploring the potential of the “Right to the City” to integrate the vision and practice of civil society and organisations of the urban poor in the struggle for the socio-spatial transformation of South African cities [281]
Recent developments in central Durban stemming from ‘white flight’, inner-city decay, gentrification, crime and immigrant enclaves have been keenly debated. However, the plight of homeless street people has received little focus. The heterogeneity of homeless street people makes them an awkward category of ‘poor’ in the context of post-apartheid poverty interventions. In a poverty policy framework which can be seen to be concerned with “the greatest good for the greatest number”, this niche population in the shadows of our developed centres may well be overlooked. Thorin Roberts of TREE explored their exclusion and some of the reasons for this.\(^\text{18}\)

For a similar group of people in Cape Town, Evariste Umbo shared the results of a survey undertaken at a local night shelter, which showed high levels of income poverty and family separation, and confirmed the need for life skills education to break the cycle.\(^\text{19}\) His organisation provides support in accessing accommodation and health services, re-integrating families, finding work and encouraging behaviour change.

A third paper on this theme reported on the application of The Re-Integration Programme (TRIP) to reintegrating homeless people back into society, that is showing promising results.\(^\text{20}\) TRIP is a client-centered methodology that assists and measures progress on three criteria: lifestyle, accommodation and employment. Factors associated with successful reintegration are discussed in the paper and include: a catalyst for change (often a personal crisis); advocacy and support; ‘parenting’ to teach the basics about personal hygiene, life and interpersonal skills.

From homelessness this chapter moves to consideration of another category of marginalised people in the urban setting: migrants. Broadly these are of three types:

- Internal migrants – generally from rural areas moving to town in search of a job or to join a family
- Foreign migrants – generally from elsewhere in Africa, often with reasonable education but employed in some unskilled job at the bottom of the economy
- Oscillating, or two-way, migrants – especially from Lesotho and Mozambique to the mines – and many from the deeper rural areas of the country, maintaining a century-old pattern,

\(^\text{18}\) Thorin Roberts – The wrong kind of poor [232]
\(^\text{19}\) Evariste Umbe, Poverty & labour issues [272]
\(^\text{20}\) Grafton Whyte – TRIP: A methodology for the reintegration of homeless people [294]
which has not yet withered away, despite the abolition of the pass laws in 1986.

There was little discussion at the conference about the system of oscillating migration – central though it is to an understanding of the creation of rural poverty in the Reserves or ‘Homelands’ of apartheid South Africa. It is a topic brought to national consciousness by the Marikana crisis of 2012, which needs far more attention than it has yet received in official policy. It is hardly mentioned in the NDP and yet, as any analysis of the geography of poverty in South Africa makes clear, it has to be confronted head-on if the generation of rural poverty by apartheid capitalism is not to continue into the future.

With regard to the other two types of migration, there were a number of contributions at the conference. In a long paper on migration, health and inequality Jo Vearey and colleagues from the African Centre for Migration and Society at the University of the Witwatersrand explored urban inequality through the lens of the experiences of various groups of poor migrants (both internal and cross-border) in Johannesburg between 2007 and 2012. Whilst the relationship between migration and health is complex, migration is recognised as a central determinant of health. The authors made specific recommendations for actions aimed at national, provincial and local government, the National Department of Health and civil society, and called for urgent implementation of pro-poor policies and governance responses to address issues around migration, urbanisation and health.

While most migrants are vulnerable, unaccompanied children are surely the most vulnerable group and intervention in the ‘host’ country is required to secure their well being. A paper by Tebogo Mabe of the National Department of Social Development discussed their situation. He pointed out that thousands of children migrate through irregular channels in Southern African each year, leaving their homes as a survival strategy due to various factors – including death of caregivers or parents, poverty, vulnerability, political instability, conflict. Children often migrate alone or with a caregiver to find asylum, join relatives or seek education.

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21 See, for example, Michael Noble & Gemma Wright – Using indicators of multiple deprivation to demonstrate the spatial legacy of apartheid in South Africa, discussed in Chapter 1.


23 Tebogo Mabe – Impact of migration on children [powerpoint presentation]
and work. The range and complexity of situations in which children become separated, and their diverse needs, mean that no single organisation or government department can address the situation alone. Assisting separated and unaccompanied minors outside their country of origin requires a long term commitment, often lasting years, by the stakeholders involved.

Turning now to the issue of governance, Loren Landau and two colleagues discussed the theme of ‘Planning and Participation in Cities that Move’. The dual processes of rapidly transforming cities and administrative decentralisation demand that local government address human mobility as a means of countering urban poverty. Despite this imperative, local authorities are often poorly equipped to address the needs of poor and transient residents. Through an examination of four South African municipalities, this paper identified three critical factors working against effective responses: poor data and conceptual bias; institutional ambiguities and budgeting processes; and, ironically, participatory planning. They point out two major gaps in the literature. First is the scant consideration of domestic mobility or the intersections between internal and international migration. This is a mistake. In multi-ethnic, rapidly urbanising countries, the dynamics of domestic and international migration are often remarkably similar and cannot be well understood in isolation from each other. Second, few write on local government’s efforts to address mobility in the developing world. While there is a growing literature on urbanisation patterns, most of the discussions of mobility are limited to demographers and public health specialists rather than those concerned with ‘governance’ more broadly.

How and why is it that the urban poor continue to be subjected to exclusionary socio-economic development policy outcomes despite the purported inclusive objectives of government leaders? Lindiwe Msengana-Ndlela of the Human Sciences Research

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24 Loren B. Landau & Aurelia Segatti with Jean Pierre Misago – Planning and Participation in Cities that Move: Identifying Obstacles to Municipal Mobility Management [145]

If local government fulfills its mandate in cooperation with provincial and national government, with the support of local business and civil society, we can increase social capital and cohesion on neighbourhood level

Violence Prevention through Urban Upgrading (VPUU)
Council shared the results of an empirical study systematically integrating the themes of urban governance, leadership and local economic development (LED), to identify lessons for policy practice and interventions. The study compared and contrasted LED approaches over 15 years in Johannesburg and Leeds in the UK. The findings support the need for changing the approach to governance and leadership processes of economic development, and suggest ways to engage government and the public sector with the private sector, civil society and knowledge communities.

The majority of South Africans have been poor and marginalised for a long time thus it is imperative that they understand their part in local development and how plans and decisions can have a positive effect on their socio and economic conditions. In order to ensure that poor communities are able to engage effectively with the development process, significant efforts must be made to empower them economically, socially, politically and intellectually. The Community Based Development Programme shared their experiences of LED and lessons from their interaction with communities in Alexandra Township, Diepsloot and Ivory Park, where most of the population lives in informal shacks with no security and electricity. Alexis Scholtz of WWF South Africa shared insights on the Green Municipality Infrastructure Grant Project to demonstrate both the economic and social validity of investment in ecological infrastructure, and the WWF Energy Access Initiative, a community-led approach focused on building the social infrastructure and capacity needed to address the lack of energy access amongst South Africa’s poor.

Andrew Boraine, Chief Executive of the Cape Town Partnership and Convener of the Western Cape Economic Development Partnership (EDP), gave a powerful presentation on a working model to address specific Cape regional challenges. He outlined the core values underpinning the cross-sector partnership embodied in the EDP, and the potential for moving from vision to action through the One Cape 2040 process. He identified core factors in this process as: collaborative (beyond boundaries, silos, spheres, fault-lines, schisms and dichotomies); intermediary (creating spaces for

25 Lindiwe Msengana-Ndlela – Changing gear: Cross-national lessons and proposals on inclusive governance, leadership and economic development in cities [powerpoint]
26 Madney Halim – Local Economic Development and lessons from our interaction with communities in Alexandra Township, Diepsloot and Ivory Park [powerpoint]
27 Andrew Boraine – Effective Partnerships for Inclusive Growth: Getting from Vision to Action [powerpoint]
dialogue, experimentation, prototyping, scaling-up and innovation); independent (but plugged into power); and hybrid, combining vision and action.

In an informative overview of past and present initiatives to tackle the linked deep challenges of poverty and inequality, the City of Cape Town shared recent research findings of the views of key stakeholders (residents and business) on a future vision for the city. The presentation highlighted the importance of medium to longer term strategic plans that focus on economic, social and environmental sustainability, and identified shared goals in the Western Cape Government’s ‘Towards 2040’ and the National Development Plan 2030.

Johannes Wessels of the UFS raised interesting questions around spatial inequality and development globally, and asked whether decisions taken at a small town level in post-apartheid South Africa consider both the development potential and the real interests of the local population.

Researchers from UCT’s Energy Research Centre explored the relationship between emissions, inequality and poverty, in an attempt to ‘translate’ recent economic research on these issues into accessible language for practitioners. Wlokas et al. presented a review of existing literature, and sketched a conceptual framework for analysis of mitigation actions from this perspective. Poverty alleviation projects in developing countries can attract additional funding – from the carbon offset market – if they can prove that they reduce greenhouse gas emissions, as a case study from KwaZulu illustrated graphically.

This poor community generated greenhouse gas reductions, converted these into carbon revenues and recycled most of the revenue back into the community, assisted by a voluntary carbon registry, specialising in poverty alleviation projects. The project, Umdoni Gel Stoves, is a ‘fuel-switching’ project which makes use of bioethanol gel, supplied under the South African government’s Free Basic Alternative Energy Programme.

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28 Carol Wright, Natasha Primo & Seth Maqethuka – Cape Town: The need for long-term city planning to address poverty and inequality [302]

29 Johannes Wessels – Small towns: Development potential or poverty traps? Making sure place doesn’t take preference over people [293]

30 Britta Rennkamp, Alfred Moyo, William Wills & Carolina Grottera – Reducing inequality and poverty while mitigating climate change? Key challenges for research and practice in middle income countries in Africa and Latin America [228]

31 Holle Wlokas, Britta Rennkamp, Marta Torres, Harald Winkler, Anya Boyd, Emily Tyler & Catherine Fedorsky – Low-carbon development and poverty: Exploring poverty alleviating mitigation action in developing countries [299]

32 Peter Atkins & Gisela Prasad – Leveraging carbon revenue for poverty alleviation [12]
policy, and using donor-supplied gel stoves. The benefits included reducing the risk of fires, indoor pollution and greenhouse gas emissions, along with household energy costs, while promoting soil fertility and sustainable local business.

Although poverty is a multifaceted concept and experience, the need to measure and quantify it usually results in a few metrics being widely used and reported, chiefly based on economic or social attributes. Biological resource attributes are seldom included.

Charlie Shackleton and Sheona Shackleton of Rhodes University presented accumulating evidence from South Africa and internationally of the dependence of marginalised and poor communities on natural biological resources such as fuelwood, wild foods, building materials, and medicinal products. The paper shows how such use mitigates against income and asset poverty. Without access to such biological resources, poverty levels and vulnerability would be greater, placing a greater burden on the state and donor agencies.

Climate change threatens attempts to eradicate hunger, with rising food prices impacting most heavily on the poor. Kola Odeku of the University of Limpopo presented strategic interventions that utilise both orthodox scientific and indigenous approaches to achieve food security, resilient communities and agricultural sustainability.

Researchers from UCT shared a case study of environmental education conducted in Kharkams village in Namaqualand among unemployed, disenfranchised rural women and learners to equip them to access alternative livelihood opportunities offered by the local environmental tourism industry.

Global patterns indicate growing levels of economic inequality between custodians of coastal resources and those exploiting them, and an increasing incidence in absolute levels of poverty. A presentation by Rachel Wynberg and Maria Hauck of UCT’s Environmental Evaluation Unit shared a new conceptual approach to benefit sharing in coastal communities, taking into account the value of natural resources, along with the influence of external factors such as markets, policies, land tenure, and power relations on benefit sharing.

Rachel Wynberg and Jaci van Niekerk shared a strategic analysis of biodiversity commercialisation in southern Africa, through study of four value chains traded on regional and global markets. Their paper emphasised the wide variety of outcomes that emerge when commercialisation is pursued by different institutional actors, and pointed to common features that can reduce inequality and promote sustainability.

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35 Natasha Gabriels & Jocelyn Collins – Environmental education and entrepreneurship development in Namaqualand: An investment in the future [86]
36 Rachel Wynberg & Maria Hauck – People, power and the coast: A conceptual framework for benefit sharing [305]
37 Rachel Wynberg & Jaci van Niekerk – Inequality and equity in wild product value chains [304]
Nearly twenty years after the formal end of apartheid, South Africa is still one of the most unequal societies in the world, and a child’s gender, ethnicity and place of birth have a huge impact on his or her chances of success. Recent compelling scientific evidence underlines the importance of the early years of life, not only in determining capacity (education, earnings), but also health and longevity (especially related to chronic disease), and personal (stress, anxiety) and social (withdrawal, aggression) adjustment.¹

Speaking on the eve of the World Economic Forum in Cape Town in May 2013, National Planning Minister Trevor Manuel warned that unless South Africa improves its education system, unemployment will worsen, particularly among the youth.² Manuel says education is the key to breaking the cycle of poverty, and that educated young South Africans must be a key voice in ensuring that children from disadvantaged backgrounds have access to education that will break the cycles of poverty.


Poverty, inequality and education

It is perhaps wise to begin this section with a warning. There are no easy ways out of the difficult, complex situation in which the South African schooling system now finds itself 20 years after Oliver Tambo, returning from exile, gave his famous three-word message to the youth of the country. The country is awash with analyses; diagnoses; plans; villains; victims and wish-lists. But to no avail. The country seems stuck with a dual education system where a minority of perhaps 20% get a reasonable, sometimes excellent, education at both primary and secondary school whilst the majority emerge after 8 to 12 years of schooling with an education and training that ill equips them for work in an industrial 21st century global economy. Indeed many of them are lucky if they are able to read, write or count properly at all.

“There are few more frustrating puzzles in Africa than the South African education system,” writes Jurie Joubert. The pre-tertiary system consists of about 13 million learners, 390,000 teachers and more than 27,000 schools. For some time, education expenditure has taken the largest slice of government spending, hovering around 20%, and growing steadily from R140 billion in 2008/9 to a planned R165 billion in 2010/11.4 “Improving the quality of education implies more than an emphasis on expanding current systems of education. It implies a cultural change. The time is ripe for pedagogical renewal.”

But it is possible that we have been asking the wrong questions. Examination of the underlying structures suggests that instead of asking how education can bring about a more equal society it might be worth considering how a more equal society could lead to more equal education. Be that as it may it is clear that we have not yet found our way through the complex history which we inherited. It is also clear that hunting for scapegoats is unproductive. Moreover there are green shoots sprouting – to be found in various corners of the country. Enough to know that there must be a way through if we keep looking hard enough. The many contributions at the conference were part of that process of looking.

In his paper, ‘Education and its liberatory potential’, Graeme Bloch points out that: “The many claims for what education can or should

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3 Reporter: Mr Tambo, Sir, do you have a message for the youth of South Africa? ORT: Yes I do. In 3 words: Education; Education; Education.

4 Jurie Joubert – Poverty and education [126]
do not necessarily resonate with reality. In the South African case, severe inequalities may be hidden from view."\(^5\) He suggests that a social analysis of education, and its impact in society, may reveal that the structures of education as they currently exist act largely to reinforce inequalities in education as well as in society.

From an overall, macro perspective the crucial importance of the link in South Africa between education and employment – and hence poverty and inequality – was examined thoroughly by Professors Jan Nieuwenhuis and Johan Beckmann from the University of Pretoria.\(^6\) The facts are sobering. The results of an analysis of youth unemployment by the National Treasury in 2011 indicate that:

- Approximately 42% of people aged under 30 are unemployed compared to less than 17% of those over 30;
- Only 20% of the workforce younger than 25 are employed compared to 40% in most emerging economies;
- Employment of 18 to 24 year-olds has fallen by more than 20% (320,000) since December

\(^5\) Graeme Bloch – The liberatory discourse of education: Education and discourse in South Africa [30]

\(^6\) Jan Nieuwenhuis & Johan Beckmann – The challenges faced by education in solving the unemployment problem in South Africa [19]
2008; and

- Unemployed young people tend to be less skilled and inexperienced – almost 86% have no formal further or tertiary education, while two-thirds have never worked.

Meanwhile, skills shortages across the whole spectrum of the economy are clearly hampering expansion of the economy.

The survey noted that there was a particular shortage of chartered accountants, IT specialists, sales and marketing personnel and scientists. Erasmus & Breier (2009), supporting these findings, indicated a shortage of between 350,000 and 500,000 people with the requisite qualifications to fill managerial and technical positions,7 while the Department of Health and Netcare estimated between 28,000 and 30,000 vacancies for nurses in the public and 5,000 in the private sector.

Why can our education system not produce the types of skills needed in the quantity and of the quality expected to satisfy the needs of the economy and contribute to economic growth and development? While this is indeed a complex issue, and the subject of much solid research, two factors leap out – extremely poor literacy and numeracy levels of primary school children, and high drop-out rates. The link between education, earnings and employment was analysed in a sophisticated statistical paper by Branson, Ardington, Lam and Leibbrandt who described changes in the distribution of education across birth cohorts and how these relate to changes in the distribution of inequality in employment, earnings and the premiums to matric and tertiary in South Africa.8 They use a series of cross-sectional data sets to follow cohorts born between 1935 and 1985 over a 17-year period. Rapid increases in educational attainment resulted in substantial differences in the supply of educated workers across generations. In addition, there are questions of changes in education quality. Inequality in both access and quality of education was a

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8 Nicola Branson, Cally Ardington, David Lam, Murray Leibbrandt – Changes in education and the effects of earning and employment inequality in South Africa: A cohort analysis [37]
cornerstone of the apartheid regime in South Africa. While improvements have been made to equalise access to and funding of education, inequality in educational attainment, levels of completed secondary (matric) and tertiary and quality of education attained, remain. This has lasting effects on employability, earnings and income inequality. Some idea of what this actually means may be gleaned from their finding that: “Tertiary is well and increasingly valued in the South African labour market. Within the youngest birth cohort, the average person with tertiary earns between 2 and 3 times the wage of a matriculant and is around 40% more likely to find employment at age 26.” Small wonder that there is such pressure to get into the universities.

So how do we reduce the divide between school matriculants and those who complete university degrees? Ranchhod and Pellicer make recommendations on precisely this point based on their analysis of human capital accumulation in the South African context:9 “There appears to be sufficient evidence to suspect that South Africa is caught in an inequality trap where high inequality leads to low levels of skill accumulation, which in turn consolidates the high levels of inequality. The trap works particularly through tertiary education: it is at the tertiary level that access is very limited and that returns are very large.” The writers propose two sets of policy interventions and strategies: one dealing with the issue of credit constraints and the other strengthening ‘intermediate’ degrees to reduce inequality and promote skill acquisition.

A paper by three of the country’s most experienced educationalists examined critically weaknesses in the education system and proposals to address these, including those proposed in the NDP and by the Department of Basic Education.10 With regard to the NDP the authors questioned the proposal for ‘performance pay’, holding individuals to account for what is a collective task in schools, and highlighted that teacher unions cannot be removed from the calculation – as experience in other countries and South Africa indicates. With regard to the use of indicators by the Department of Basic Education to measure school performance and provide a basis for accountability, the authors argue that “the selection of indicators to peg performance will likely firstly, define the purposes of education in ways that may be antithetical

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9 Miquel Pellicer & Vimal Ranchhod – Inequality traps and human capital accumulation in South Africa [226]
10 David Gilmour, Pam Christie & Crain Soudien – The poverty of education [91]
A national education partnership

An informal grouping of organisations has sought to mobilise the energies of many organisations active in education to achieve the single objective of supporting the Department of Basic Education (DBE) to improve learning outcomes. Participants in these conversations have understood that a ‘national partnership’ will only exist when it is established by the DBE with the strong support of the key national social partners. These interactions with more than 50 individuals and organisations have been characterised by energy, excitement and a determination to walk together to make a difference in education. There is consensus that we need to find a game-changer – that we cannot continue as we are and think that we will address our challenges.

There is enormous commitment to finding ways to make a difference to the serious educational problems we face and many initiatives with potential to contribute to making this difference. There is also a widespread desire to multiply the impact of individual efforts by working collaboratively for collective impact.

When a partnership is established it will be led by government and based on government’s clear policy and implementation agenda including the structured vision for medium and long-term development set out in the DBE’s Action Plan to 2014. It will seek to implement a large-scale national programme aimed at improving learning outcomes in 10% of schools nationally. This will provide proof and refinement of the concept, the instruments and the measures, and provide a basis for extending the partnership across the country.

A set of 5 interventions is proposed:

1. Building a support oriented district
2. Learner Teacher Support Material based on CAPS
3. Improving leadership and management capacity of Principals and school management teams
4. Teacher development orientated to effective use of Learning and Teaching Support Material and curriculum coverage
5. Alleviating the socio-economic burden.

The partnership proposes to:

• Define success by significant and enduring improvements in pupil learning as measured by the Annual National Assessment and the NSC over a three to five year period
• Provide a programmatic change management capability implemented in participating districts with additional capacity embedded
• Use a shared language of change management and shared processes and tools for supporting districts and schools
• Design tools and instruments to support credible outcomes-focused planning and accountability systems, and include instruments to monitor impact
• Contribute to the operationalisation of the intentions/spirit of the NEDLAC Accord.

The tools and instruments developed will be open-source and will be available for use by implementation partners across the system (working outside of the 10% of the schools in the project).

An evening plenary session on the proposed National Education Partnership, convened by Mary Metcalfe, was held on Tuesday 4 September 2013, at the Baxter Theatre.
to broader societal purposes of education, and secondly, drive the system in directions that may exacerbate the problems identified in the first instance.”

So what do the authors propose? Their answer lies in Amartya Sen’s capability approach, and they propose the need for teachers, unions and school communities to work together towards shared solutions. Changing schools takes time – and in the case of South Africa, it will require targeted interventions which support schools and students in circumstances of poverty and hardship.

These conclusions seem to be borne out by Nick Taylor’s assessment of schools and accountability, where he suggests that in reality the standard for accountability is compliance rather than effectiveness. He argues that in the nearly two decades since the end of apartheid, schooling policies have oscillated between according teachers almost unlimited professional autonomy (under C2005), and a variety of bureaucratic measures ranging from the most burdensome demands of the National Curriculum Statements (NCS) to a lighter touch under the Curriculum Assessment and Policy Statements (CAPS). However, none of these has had any effect on the quality of schooling, as measured through international comparative tests, although CAPS is too new to have shown its effects yet. There is overwhelming evidence that the capacity to respond positively to objective information on learner performance is lacking with respect to the large majority of teachers. While there is no doubt that many schools need to be held to account to a far greater extent than they are at present for matters such as poor time management, failure to procure and manage adequate supplies of books, and infrequent reading and writing in class, to attempt to propel progress by enticing teachers with carrots while beating them with sticks, like so many donkeys, hardly seems a sustainable strategy for driving higher levels of performance in a complex network of loosely coupled sub-systems in which knowledge is the product. Taylor suggests that mechanisms must be found to orient the educational system towards expertise and away from nepotism, paper qualifications and years of service as criteria for advancement which currently dominate. A key intervention nexus would be to focus on improving the subject expertise of

Enticing teachers with carrots while beating them with sticks, hardly seems a sustainable strategy for driving higher levels of performance

Nick Taylor
principals, deputy principals, and heads of department within the schools.

Despite 15 years of concerted testing, South Africa’s teachers have not benefited, but rather been left confused. The pertinence of systemic tests for the classroom is left unexplained. Caroline Long and Tim Dunne drew attention to a model of educational assessment which includes a monitoring component, a professional development component and a formative component, in which teachers become central role players. The authors argue that by addressing discipline knowledge through professional development, teaching and learning, through a formative component and a monitoring component, through the construction of high quality assessment instruments where modern scientific techniques for the generation are used, in an integrated system, progress may be made. At the heart of the approach is the notion of teacher agency.

One of the clearest pointers as to the direction in which to move came, surprisingly enough, with regard to the controversial topic of language policy.

Drawing on a sample of 28,000 individuals in the first wave of the 2008 NIDS, Daniela Casale and Dorrit Posel from the University of KwaZulu Natal presented three main findings:

- Africans are more likely to be proficient in English (defined as the self-assessed ability to read and to write very well in English) if they are also able to read and write very well in their home language;
- Average earnings are significantly larger among Africans who report good English-language skills than among Africans who do not report good English-language skills; and
- English-language proficiency is rewarded more highly than home language proficiency in the South African labour market.

As the authors point out, these findings help explain why parents want their children to study in English, but they also support a large body of literature which argues that the acquisition of second-language skills is best supported through the acquisition first of home language skills. In policy terms the implications are that parents themselves need to be educated as to the value of early mother tongue education for purposes of learning English and that schools must be supported and helped in the execution of training their children in mother-

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12 Caroline Long, Tim Dunne & Willys Simfukwe – Towards social transformation: Addressing poverty and inequality in the southern African educational context [156]

13 Daniela Casale & Dorrit Posel – Language proficiency, language policy and earnings in South Africa [43]
tongue reading and writing. All of this at least as far as Grade 3. Fortunately a selection of excellent readers in all language is already available. The findings of this research strengthen the hand of those who have long argued that a dual language policy is – for all sorts of reasons – most appropriate for South Africa. For those whose home language is English, the acquisition of a second language would, we believe, be equally beneficial.

**Nurture: Family contexts**

Concerted efforts to improve the early development of all children – especially those who continue to be denied opportunities to grow, develop and achieve – through effective interventions at the environmental, social and personal levels could boost education, productivity, health and social adjustment over the next two to three decades. The conference heard three presentations focused on strengthening families as a key measure to address poverty and inequality. In 2012, the National Department of Social Development engaged with over 500 participants across the country around development of a Family White Paper.

A presentation by Lizette Berry of the Children’s Institute and Monde Makiwane of the HSRC explored participants’ views on the main challenges affecting families in contemporary South Africa (poverty, HIV/AIDS and high mortality rates, substance abuse, unemployment and inequality), and proposed policy measures to strengthen families and address the debilitating effects of socio-economic risk factors.15

Adolescence is considered the pivotal decade in which poverty and inequality is passed on to the next generation. Anja Botha of the University of the Free State presented findings from a study among 1,200 Grade 8 learners that explored the negative impact of poverty on resilience, coping skills and family involvement among adolescents. Drawing on international research, the study highlights the need for parental education and intervention programmes in schools and communities, and the importance of enabling adults to spend time with their families as a key consideration in policies aimed at combating poverty.16

South Africa has one of the highest rates of

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14 A belief, based on experience, where a second language seems to have an effect analogous to having not one but two eyes and thus having the capacity to see depth as well as length and breadth.

15 Lizette Berry & Monde Makiwane – Toward the development of a family policy for South Africa: A call for an effective, robust poverty alleviation strategy [167]

16 Anja Botha – The role of family involvement in the coping and resilience of adolescents living in poverty [32]
father absence in the world. Migrant labour, delayed marriage due to lobola requirements, gender-based violence and growing autonomy amongst South African women, are factors contributing to father absence from households. International and local research shows that father absence is associated with adverse consequences for children, women, families and men.\textsuperscript{17} In their contribution, ‘Fathers and other men in the lives of children and families’, Linda Richter et al. of the Human Sciences Research Council suggest options to address this critical issue, and promote the engagement of men in child rearing and family life in South Africa.

Early Childhood Development

Early Childhood Development (ECD) services have been labeled ‘a powerful equaliser’ because they channel assistance during the crucial first ‘1000 days’ – a time when children are most able to make up for generational disadvantages. However, this requires a long-term developmental approach to interventions, beginning in pregnancy and continuing into formal schooling, including promotion of planned and safe pregnancies, assisted delivery

\textsuperscript{17} L Richter, C Desmond, T Makusha, S Swartz, M Makiwane, R Morrell, V Hosegood & S Madhavan– Fathers and other men in the lives of children and families [231]
and postnatal care; nutritional support for pregnant women and young children; social protection to enable families to care for a young child; preparation for and support for parenting; childcare for working parents and other families needing assistance; opportunities for young children to learn at home and with other children in the company of supportive adults; and preparation for formal schooling.

ECD services are thus a key priority for national socio-economic development. A panel discussion on ‘Foundations of Life: Towards Quality Early Childhood Development for all’, convened by Andy Dawes and Pamela Reynolds of the University of Cape Town, on the first day of the conference demonstrated the level of energy, innovation, hard work and collaboration at work in this important field. Sherri Le Mottee emphasised the key elements of multi-donor co-ordination, growing to scale based on well-grounded analysis, a population-based approach and the importance and value of home visiting. A presentation by Barak Morgan et al. outlined a ‘biopsychosocial’ response to poverty, and underlined the importance of intervention at the prenatal/neonatal phase of human development. Research has shown that investment return in human capital decreases sharply from birth, reaching break-even point around 6 years old. A rich vein of evidence ties together neuroscience, epidemiological and psychosocial perspectives, providing a compelling interdisciplinary model of the manifold ways whereby early socioeconomic adversity perpetuates poverty across multiple generations in ‘environmentally heritable’ ways. These interdisciplinary innovations move both science and policy/programmatic action beyond prior unproductive dichotomies (between socio-cultural-political intervention and biological science) and have already guided a range of socially-oriented interventions.

Linda Biersteker from the Early Learning Resource Unit (ELRU) presented a case study of the Sobambisana ECD project, illustrating how partner organisations can work together to increase impact. She emphasised the need for greater advocacy in communities around the value of ECD, including through parent education workshops and

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18 Sherri Le Mottee – Ilifa Labantwana: Facilitating a quantum leap for early childhood development in South Africa [148]

19 Barak Morgan, Mark Tomlinson, Demetre Labadarios, Peter Cooper, Astrid Berg, Tim Oberlander, Pasco Faron, Jack van Honk, Frank Kessel, Lynn Murray, Carol Worthman & Clifford Shearing – A bioPsychoSocial response to poverty [188]

shared both positive and negative findings from their long-term evaluation. These included the negative effects of stunting (evident in 37% of the children with whom they worked) on children’s prospects for full cognitive development. Andy Dawes pointed out that it is rare for donors to fund such long-term evaluation studies, and affirmed the value of lessons learnt, including promising evidence of real effects.

In a presentation sharing other lessons from Sobambisana, Thorin Roberts of TREE stressed the need to manage community expectations, and to be aware of the reasons for self-exclusion among the most vulnerable of the potential participants. Among many other important points raised, he expressed concern about the great number of very young mothers and their emotional, social and nutritional needs. Rene King described the work of Khululeka in the Eastern Cape, an Integrated Family Home Visiting Programme aimed at very vulnerable children. She stressed that each community has its own profile and individual character and needs, and that it is essential to base provision on the needs expressed. A display on Khululeka featured at the Festival of Ideas, and some of the images reproduced for conference media drew on these powerful images.

The panel discussion was followed by a lively parallel session on ‘Providing the first best chance for all children’. Chris Desmond shared key findings from the diagnostic review by the Inter-Departmental Steering Committee on ECD commissioned by the Presidency (outlined in the overview at the start of this chapter). David Harrison of the DG Murray Trust sketched the current policy landscape and provided an overview of what is needed to realise the vision of White Paper No. 5 on ECD and provide population-level ECD support from conception into primary school, particularly to the most marginalised children in our country.21 Despite considerable progress, Harrison pointed out that ECD services remain fragmented and are not reaching the majority of children in need, and made concrete recommendations to

### A rich vein of evidence from neuroscience, epidemiological and psychosocial perspectives shows how early socioeconomic adversity perpetuates poverty across multiple generations

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21 David Harrison – The state of provision of early childhood development services in South Africa [105]
address these challenges (outlined at the end of this section on ECD).

Michaela Ashley-Cooper and Eric Atmore of the Centre for Early Childhood Development provided strong evidence of the impact of community-driven ECD programmes, including training for parents, teachers, management and governing bodies; infrastructure upgrades and equipment provision in reducing inequality, empowering communities, and helping young children and their families break out of the cycle of poverty. Lesley Osler shared the experiences of the Hantam Community Education Trust, a holistic rural development project that has operated for over 23 years in the Northern Cape. The Trust provides a continuum of support to children and families from pre-pregnancy (with home visitors providing maternal education) through to post-school education. A wide range of programmes are provided in a holistic manner that integrates health, psychological support and education, including support for teachers, and referrals for health and nutrition needs, with a major focus on mentoring and monitoring children and youth. Material from Hantam Trust was displayed at the Festival of Ideas and in a short film, illustrating the impact of their youth training programme, which has seen 180 graduates over 16 years, with 90% plus finding employment. Lesley Osler provided the following ‘recipe’ for replication: a plan that is doable; building of relationships, trust and commitment or ‘buy in’ at community level; and slow, careful implementation with consultation.

Another effective model was described by Isibindi (Zulu for ‘courage’), a community-based child and youth care service delivery model developed by the National Association of Child Care Workers (NACCW), and implemented in 67 projects nationally, in partnership with local organisations. Isibindi relies on trained child and youth care workers (CYCWs) – unemployed community members screened, selected, trained and deployed to provide services and support in their own communities under the mentorship of experienced social service professionals, making this a cost-effective model for delivering integrated services, particularly in rural areas. Isibindi involves a five-way partnership that links the Department of Social Development at provincial level, donors, the community, implementing organisations and the NACCW. A

22 M Ashley-Cooper & E Atmore – Early childhood development as a strategy to eradicate poverty and reduce inequality [14]

23 L Jamieson & Z Thumbadoo – Isibindi: Innovative approaches to rural development through the delivery of child and youth care services [268]
presentation on this innovative approach to rural development was complemented by the screening of a documentary entitled ‘The Path of Courage’.

In plenary discussion at the end of this session, it was noted that while economists focus on the long term advantages of a positive early start on human development, societal and economic well being, every child has constitutional and human rights to wellbeing and good health now. Discussion focused on what is and what is not working, and explored whether there is need to reframe the problem. While political will was identified as a huge problem, it was also felt that the children’s sector needs to make some tough choices about priorities and to take some responsibility for some aspects of the problems experienced in the field. It was pointed out that there is no funding formula for home visiting and other community based programmes, and that the very poorest children are excluded from ECD for a range of reasons. One of these is that registration standards are higher than providers can attain, and thus centres cannot secure state subsidies. However, it was also raised that the reach of ECD services is poor and uncoordinated, and that provincial governments lack the capacity required for scaling up roll-out and access. There is need to radically rethink current approaches to, and mechanisms for, scale up and the funding/subsidy model for the poorest 0-4 year-olds to increase access to ECD. Critical issues were raised, including that ECD is made ‘too complicated’ for people to understand, and that there is some resistance to using potential political levers for fear of reducing ECD to ‘capital development’. It was stressed that the most qualified teachers should be in Grade R and that the DoBE needs to understand and accept the importance of this foundation for further educational development. Another priority area flagged was the need to encourage and include parents in the education and development of their children, too often regarded as the role of the state alone. There is also need for a cadre of workers to provide on-site support in ECD centres.

The session concluded with discussion on what can be done to institutionalise what is working in terms of effective policy, institutions and service
delivery and the following recommendations were made:

- Use an evidence-based approach to develop and support clear age and developmentally linked interventions and support – from pre-pregnancy through to school;
- Promote nutrition linked to all ECD options;
- Move away from focus on ECD centres/pre-schools to a range of role players providing a range of services;
- Shift funding approach to promote integrated ECD provision with home and community-based programming (best care is in the home not crèches so do not incentivise out of care home);
- Promote NPO involvement in ECD sector;
- Upscale and standardise ECD practitioner training (only reaching 300 practitioners annually currently);
- Provide training for governing bodies as they play a critical role in success and quality of services;
- Upgrade infrastructure and educational equipment for playgroups;
- Ensure centres can meet requirements for registration and subsidy (provides about R3,000 per child per annum); and
- Recognise and cater for children with special needs.

There is widespread interest amongst policymakers in the impact of Grade R, but the possibilities for identifying causality are limited as this programme has been rolled out in a non-random way. The conference heard two interesting presentations on this topic. Stephen Taylor of the Department of Basic Education demonstrated how inequalities based on socio-economic status of learners are observable by early primary school, and how, if anything, the gap widens over a school career. As this supports the need for early interventions, including prior to school entry, it is important to track the impact of pre-school attendance, where possible focusing on Grade R, on educational outcomes. The paper drew on various techniques and data sources to piece together preliminary conclusions. Perhaps the most compelling result is from a school fixed-effects model, which because of the high level of homogeneity within South African schools controls for many unobserved potential sources of endogeneity. This suggests that moderate effects on cognitive achievement of having attended preschool persist at least until Grade 6.

Elizabeth Girdwood of UCT pointed out that from an economist’s perspective it is challenging...
to make and build an economic case for increased investment based solely on the benefit side of the equation on early childhood development.\textsuperscript{25} She reviewed international and domestic economic evidence on early learning investments, in order to provide a ‘realistic’ picture of current South African government support, and to examine the capacity and appetite for increased investment, as revealed by the past decade’s Grade R scale-up. The paper explored the costing of quality centre-based programmes, and the financial, policy, and timing implications for scale up of both quality and access, along with different financing models to facilitate the scale up of provision.

\begin{center}
\textbf{Children and Inequality: Closing the Gap}
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One of the parallel sessions at the conference was a preview of the \textit{South African Child Gauge 2012}. This section of the report gives a summary of some key messages from the \textit{Child Gauge}, and describes some of the policy windows in relation to the National Development Plan. The \textit{Child Gauge} asks: What reproduces inequality over generations, and what can be done to interrupt this cycle and level the playing field for children? Various contributing authors explored these questions and considered the policy entry points.\textsuperscript{26}

\begin{center}
\textbf{A substantive equality approach}
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Inequality continues to be reproduced over generations, despite a guiding constitutional framework which has social justice and equity at its core. Children do not start off on an equal footing, so it is important for policies to move beyond a one-size-fits-

\textsuperscript{26} The \textit{South African Child Gauge} is published by the Children’s Institute at UCT, in partnership with SALDRU and UNICEF, and can be downloaded at www.ci.org.za. The publication includes essays by the following contributors (in order of appearance): Katharine Hall, co-editor (Children’s Institute [CI], UCT); Ingrid Woolard, co-editor (SALDRU, UCT); Sandra Liebenberg (Faculty of Law, University of Stellenbosch); Gemma Wright (Oxford Institute of Social Policy, University of Oxford); Michael Noble (Oxford Institute of Social Policy, University of Oxford); Dorrit Posel (School of Development Studies, UKZN University of Kwa-Zulu-Natal); Debbie Budlender (Independent researcher); Linda Biersteker (ELRU); David Sanders (School of Public Health, UWC); Louis Reynolds (Faculty of Health Sciences, UCT); Lori Lake (CI, UCT); Sanjana Bhardwaj (UNICEF); Sonja Giese (CI); Nonhlanhla Dlamini (Department of Health); Latasha Slavin (Consultant / UNICEF); Nicola Branson (SALDRU, UCT); Linda Zuze (Wits Business School); Mastoera Sadan (PSPPD, the Presidency); George Laryea-Adjei (UNICEF)
all approach. This is the crucial difference between formal equality (where everyone is treated the same) and substantive equality (where groups may be treated differently in order to achieve equal outcomes). A substantive equality approach requires “levelling up” in appropriately targeted ways; it requires policy-makers to deliberately tailor policies and programmes that will close the gap, and prioritise the needs of especially vulnerable groups of children.

**Persistent spatial inequality**

Inequality is greatest between children living in urban suburbs and informal settlements, and lower in rural areas where populations are more homogenously poor. It is essential to address both poverty and inequality – and these may require different approaches. Children living in former homelands experience the most severe deprivation, yet local and district municipalities serving these areas frequently lack the capacity and resources to improve service delivery, thus compounding inequality.

The NDP calls for increased focus on implementation and service delivery. More work will be needed to address “institutional vulnerabilities” in local government if services to children and families are to be strengthened. Children’s care arrangements are fluid, partly because parents seek economic opportunities in urban areas while drawing on the support of family to care for children staying behind. A better understanding of where children live, and how and why they move, will help to target services better and plan for growing child populations in areas of in-migration.

**Social protection**

Cash transfers have been successful in lifting children out of extreme poverty, but the Child Support Grant (CSG) has not had much impact on income inequality because of the small grant amount, and the extreme differences between rich and poor. There are some implementation challenges too: the CSG is failing to reach many children before their first birthday, when nutritional support is most critical. Relatives caring for orphaned children can apply for the higher-valued Foster Child Grant while poor children living with parents get the much lower CSG. The sharp increase in FCG applications for poverty relief has placed a huge strain on social workers and the courts, diverting time and resources away from abused or neglected children who are most in need of care and protection. The “social floor” proposed in the NDP is about (defining and) ensuring a minimum standard of living for all households. Given the depth of poverty and the small size of the most widely accessed grant, the CSG, it will be necessary to substantially adjust grant values and/or address targeting gaps.

**Early childhood development**

Existing policy provides for a comprehensive range of care and support services for young children but the poorest and most vulnerable are not being reached. Most early care takes place within the home where caregivers need support, so ECD centres are not the answer for the very young, or for those who can’t afford fees. The NDP calls for further research into ECD delivery models and practitioner training over
the next five years. There are already a number of ‘good models’ being piloted or implemented around the country, and some of these were presented at the conference and have been described in the section on ECD. One of the key lessons from ECD programmes is that intersectoral and home-and community-based approaches are proving effective in reaching children and families most in need. There needs to be greater investment in home- and community-based services.

**Education and schools**

Education can be a powerful equaliser but learner outcomes remain poor despite high expenditure and attendance rates. Rich schools can raise fees and spend more on quality teaching staff, which is not a possibility for no-fee schools serving poor communities. There are also vast disparities in school infrastructure. Achieving equal outcomes requires a more equitable distribution of resources. It is also vital to strengthen management and accountability to ensure that funds translate into improved outcomes/quality education for all. The Annual National Assessments have been useful for identifying systemic issues and identifying under-performing schools, but this needs to be coupled with appropriate action to assist poorly performing schools and ensure that children in these schools are not left behind. The NDP refers to “turnaround plans” for under-performing schools. It will be important that these are supportive of teachers, and responsive to the unique needs of individual schools.

**Health reform – an opportunity**

The vast majority of children rely on the public health system where resources are thinly stretched and very unequal. For example, one public service paediatrician serves 9,600 children in the Western Cape, versus one million children in Mpumalanga. Private health care accounts for 44% of total health expenditure, yet services only 15% of children’s needs. The National Health Insurance aims to achieve a more equitable distribution of resources and ensure that services reach those most in need through the reengineering of primary health care. District paediatricians will provide leadership for child health programmes at district level, supported by teams of community health workers. The success of the programme depends on the numbers, skills and motivation of public health workers. Incentives are also needed to address staff shortages in rural areas. In the meantime, inequalities in HIV prevention need to be addressed urgently. Increased access to Prevention of Mother to Child Transmission (PMTCT) services could virtually eliminate paediatric HIV, but children’s access to treatment and prevention services lags behind that of adults and varies across provinces and districts. Better monitoring and information systems are needed to identify barriers and ensure more equitable access to prevention and treatment services.

*Kath Hall*

*The South African Child Gauge*
Schooling, language and literacy: Challenges and responses

The concept of low quality education as a poverty trap was thoroughly explored by Servaas van der Bergh and his team at the University of Stellenbosch. Their study showed that by the age of eight there are already significant gaps in the performance of school children in the top 20% of the population (top quintile) versus those in the bottom 80% (bottom four quintiles). In other words, by an early age there are already stark distinctions between the prospects of children from poorer communities and those from more affluent communities. In seeking to understand the dynamics responsible for the great South African divide between rich and poor, and to suggest a way forward, the authors note that despite reforms, including targeted expenditure on poorer schools:

Surveys indicate that the level of cognitive achievement of the majority of South African children is alarmingly low in key learning areas such as Reading, Mathematics and Science. ... In the Trends in International Mathematics and Science Study [TIMSS] of 2002, South African Grade 8 students achieved the lowest average scores in both Mathematics and Science out of 46 countries, including six African countries ... Not only is the cognitive performance of South African children disturbingly low, it is also highly unequal. According to SACMEQ III, the average Reading test score for the richest 20% of learners in Grade 6 was 605, compared to 436 for the poorest 20% of learners (the mean across the international sample was set at 500 and the standard deviation at 100). This disparity was repeated in the Mathematics test, although the difference was slightly smaller with averages of 583 and 454 respectively. South Africa’s rural children did far worse than rural children in most other countries in this African sample, as did the poorest quarter of South African students in comparison with the other countries in the sample.

This sobering analysis was followed by three key suggestions for providing quality pre-school education, particularly for poor children; reducing income inequality and addressing pre-labour market inequalities; and improving skills of poor people.

27 S van der Berg, C Burger, R Burger, M de Vos, G Durand, M Gustafsson, E Moses, D Shepherd, N Spaull, S Taylor, H van Broekhuizen & D von Fintel – Low quality education as a poverty trap [277]
Nicholas Spaull of Stellenbosch University demonstrated how the legacy of apartheid continues in inequality in primary schools. South Africa remains a tale of two schools, with concrete implications for reporting statistics and modeling educational performance. The legacy of apartheid – and consequent correlation between education and wealth – means that, generally speaking, poorer South African students perform worse academically. Schools which served predominantly white students under apartheid remain functional, while those which served black students remain dysfunctional and unable to impart the numeracy and literacy skills students require. He argues that there are in fact two different education systems in South Africa and thus two different data-generating processes, evident when splitting student performance by former department, language, or socioeconomic status. The study found stark differences in factors influencing student performance when modelling separately for the wealthiest 25% of schools and the poorest 75% of schools. The author concludes that unless this is taken into account by policy makers, the current patterns of poverty and privilege will remain unchanged.

A review of classroom-based studies on teaching and learning in South African primary schools serving poor communities by Ursula Hoadley from UCT outlined remarkable consistency about what is going on (and generally going wrong) in classrooms. Her research focused on the specific role of instruction, as opposed to issues of management and teacher professionalism, two factors which are have gained prominence in much of current thinking about how to improve schools (including in the NDP). The author highlighted the danger of overlooking the potential benefits and impact of effective classroom interventions, and the need to build on existing research to deepen our understanding to improve schools and their outcomes.

Emerging and ongoing research on schools that function effectively, despite almost overwhelming

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28 Nicholas Spaull – Poverty and privilege: Primary school inequality in South Africa [249]

29 Ursula Hoadley – What do we know about teaching and learning in South African primary schools? [112]
circumstances, support the case for locating educational improvement within the broader context of community development. Pointing out that schools remain one of the few intact social institutions in many of South Africa’s rural and urban communities, Allistair Witten of the Centre for the Community School, Nelson Mandela Metropolitan University, made recommendations for an integrated approach to improve learning and contribute to community development. The work of ‘community’ schools represents an alternative approach with implications for policy, practice, and the training of school teachers and leaders.

Another model attempting wide-scale transformation of the schools is the Principals Management Development Programme (PMDP) whose overarching objective as it explores a new paradigm in school management is “to improve school performance as set out in the DBE Action Plan 2014 through the development of critical applied management competencies of public school principals (and their leadership teams) in all provinces of South Africa on a fast track basis”. The PMDP is currently the only large-scale, rapid highly applied skills development school management programme in South Africa. It was successfully implemented in over 1,200 schools between 2009–2011 and demonstrates conclusively that it could be scaled up and replicated in all provinces and school contexts, with positive measurable impact in assessment results, especially in quintiles 1 and 2 and even so-called ‘dysfunctional’ schools. Launched as a pilot in 50 schools, the Provincial DBE was so impressed with results that they extended the programme for three years to engage 600 schools a year. The cost of covering 50% of all schools nationally is around R25 million, and would need about 40 facilitator/coaches. The PMDP project directors are in discussion with other provinces about replication. Clearly this is an initiative worth watching closely.

Language and literacy are key factors influencing the long-term educational, social and economic prospects of individuals and groups. The period from birth to eight years of age is critical for the development of literacy, which lays the foundations for children’s ability to acquire life skills and to achieve educational success. Research from economically developed countries suggests that a mother or carer reading to an infant may be especially effective as a means of promoting infant cognitive and language development.

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30 Allistair Witten – Developing an alternative conceptual approach to school improvement in South Africa: The School-based Complementary Learning Framework [Powerpoint]
Information Technology in Education

ICT can provide tools to significantly improve the quality of education in South Africa. Michael Rice of the PETS Foundation explored ways to adapt the effective Perinatal Education Program\(^{31}\) model to promote in-service teacher training using information technology (websites, cellphones, tablets, readers) to facilitate self-tuition groups and cooperative learning, thereby promoting individual responsibility for professional development and offering cost benefits to the fiscus.\(^{32}\) The PETS Foundation is researching the viability of introducing e-tablet technology and digitisation as a means of enhancing learning in the South African education system and circumventing critical obstacles impacting on teaching and learning.

The 2003 White Paper on e-Education advocates the pedagogical integration of ICTs to promote development of higher-order thinking skills and quality education, their effectiveness depends on the expertise of teachers. A study by Noklunga Ndlovu and Donovan Lawrence of Wits School of Education flagged some of the challenges involved in introducing teachers to technology use in the classroom.\(^{33}\) Many schools (mostly disadvantaged) that have recently acquired computers still use ICTs to transmit subject content, rather than to enhance learning.

The Education Development Unit in the Faculty of Health Sciences at UCT has been involved in publishing Open Educational Resources (OER) since 2008.\(^{34}\) Lessons learned at tertiary level regarding OER can easily be applied at a school and FET level to achieve meaningful access to education for all. The use of OER could address teaching and learning inequality caused by a lack of available materials and resources. The core of an OER strategy would revolve around the role of government in ensuring production, distribution and reuse of OER. At a national level there is a need to recognise the value of publishing and use OER to encourage these activities.

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31 www.pepcourse.co.za
32 Michael Rice – A new model for in-service teacher training [229]
33 Nokulunga Ndlovu & Donovan Lawrence – The quality of ICT use in South African classrooms Wits University [197]
34 Gregory Doyle, Glenda Cox & Samantha Lee Pan – Open Educational Resources as a strategy to address inequality in education: Opportunities and challenges [70]

Nal’ibali (isiXhosa for “here’s the story”) is a national reading-for-enjoyment campaign, driven by the Project for the Study of Alternative Education (PRAESA), Times Media and other partners. Children who are immersed in great and well-told stories – and in languages they understand – become inspired and are motivated to learn to read for themselves. Such personally rewarding learning is a recipe for successful literacy development. Nal’ibali is helping to root a culture of literacy into the fabric of everyday life in South Africa through sustained mentoring and collabora-
tion with communities, reading clubs, literacy organisations and volunteers of all ages, as well as a vibrant media campaign and website.\(^{35}\)

Despite the constitutional equality and recognition of all 11 official languages, language inequality impacts negatively on the prospects for the majority of scholars. Multi-bilingualism offers an appropriate post-apartheid approach to counter the disadvantage of using a second language as a medium of instruction.\(^{36}\) The Home Language project was initiated in Johannesburg in 2001, by concerned parents from former Model-C schools, in recognition of the need to overcome inequality through multi-bilingual education. The presentation outlined their approach, and recommended further research and development to promote innovation in developing new techniques and methodologies, and collaborations with organisations such as REPSSI, which provide psychosocial support across Southern and Central Africa.

Continuing with this theme, the Molteno Institute for Language and Literacy (Molteno) explored why, despite a language policy advocating home language as the language of learning and teaching in the early years and the availability of reading materials in African languages, the literacy performance of South African primary school children remains unacceptably poor.\(^{37}\) This led to the development of Vula Bula, an indigenous languages graded reading series of 32 books, constructed according to the same methodological principles as the many mother-tongue English and Afrikaans readers available for young learners, with the support of the Zenex Foundation. Their presentation detailed the development process, shared samples of the materials, and demonstrated their utilisation. The series is currently available in isiXhosa, isiZulu, Sesotho, Setswana and isiNdebele with Sepedi, Tshivenda and Xitsonga in the pipeline.

**Beyond schools**

The NPC acknowledges a significant need to develop the “*capabilities of the historically disadvantaged to take advantage of the opportunities that democracy, openness and the economy afford*”.\(^{38}\) One of the most interesting and, in some senses, disturbing aspects of the Towards
Carnegie3 Conference was the apparent lack of attention in universities around the country to the issue of training youngsters who leave school with few skills and scant prospects for employment or post-school vocational training (including apprenticeships). Clearly there is a huge amount of research and thinking being done with regard to both early ECD and more formal education, whether at primary, secondary or university level (although little was presented on the latter at the conference), but the critical space now occupied by the Further Education and Training (FET) Colleges remains largely uncharted. While there is certainly important work happening that did not find its way to the Carnegie3 ‘table’, clearly far more needs to be done. Here then is a critical area highlighted in the NDP which urgently requires more attention within the academic research community.

In one significant contribution, Salim Akoojee presented some key challenges faced by FET colleges in their quest to deliver on their skills development mandate, arguing that a crucial reason for the lack of any meaningful success lies in a lack of synergy between the supply-side and the demand-side requirements of skills in the market. He drew attention to the history of public Technical and Vocational Education and Training (TVET) institutions (referred to as FET colleges). The shift from a predominantly white learner composition (from 67% to 16%) to one dominated by African students (from 15% to 74%) is striking, and provides a basis for suggesting that it has been perhaps one of the most transformed education sectors in the post-apartheid era. However, while there is clearly much social, economic and political impetus for ensuring success, there are structural considerations peculiar to the sector that need to be addressed at the highest level. The mix of policy incoherence and the ‘structural disconnect’ between policy intention and operational reality have resulted in a sector that has ‘fallen through the cracks’. The rhetoric of skills development to which the South African government is purportedly committed is not borne out by this ‘locational disjuncture’. The ‘sandwiching’ of the sector between national intention and operational reality without the necessary provincial muscle to ensure that intentions are realised is one


40 Salim Akoojee – Scarce skills and public technical and vocational training in South Africa: Twin challenges or two sides of the same coin? [3]
problem that needs to be addressed urgently. But this is by no means the only one. The nomenclature used to describe the FET college sector is not helpful either. The schooling component that has been incorporated in the term ‘Further Education and Training’ means that the college component is quite easily relegated in favour of the high-stakes matriculation examination.

Akoojee argues that the systemic failure to address the needs of the ‘post-school’ and ‘part-time’ employed sector means that FET colleges are likely to be relegated to the level of vocational schools, which means that the system has effectively dismissed intermediate-level skills provision. This development has considerable impact on a higher education system that is barely able to cope with an influx of learners having no other option. The inclusion of the universities of technology as higher education institutes means that the pathway from schooling to higher education has been reinforced, leaving little room for intermediate-level skilling in the national education and training landscape. This situation has considerable negative impacts on the possibilities for skills development.

In another contribution to this critical area, Sandla Nomvete explored internship programmes, assessing the relationship that government interns enjoy with the ‘host’ organisations in terms of institutional setting, relations with colleagues and with mentors. In an attempt to build skills and capacity in the South African economy, the government intervened to compel the private and public sectors to play a role in preparing graduates for the labour market through workplace programmes, in line with the Skills Development Act No 97 of 1998. The Act provides for learnerships, apprenticeships and internships. The paper focuses on two national departments, outlining and assessing the challenges, shortcomings and progress made in implementing internship programmes. The paper concludes with recommendations aimed at public departments and private organisations for the structure and overall running of the programmes.

Established in 1980 to improve the lives of the poor and unemployed by teaching and training skills such as vegetable gardening, poultry production, bricklaying, plastering, cooking and catering, the Midlands Community College was one of the first non-racial colleges of its kind. Over 30 years later, Midlands Community College is a registered

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41 Sandla Nomvete – Interns and Mentoring: A Sociological Assessment of Existing Programmes in South Africa [205]
42 Debby Evans – Making education work: The Midlands Community College Experience [78]
FET institution in KwaZulu Natal that delivers sustainable skills development in Kwazulu Natal, especially in the Midlands area. Their courses aim to help young people, and adults without much education, gain skills or qualifications to improve their chances of entering the labour market. In particular, the Maths, Science, Technology Recovery Project is an appropriate practical model that helps Grade 12 students from under-resourced schools and poor backgrounds to ‘connect with opportunities’ – in this case to access tertiary studies and further education that otherwise would not be possible. Likewise their training courses and projects in the area of ECD impact at the very foundational levels of safety, health and education for a new generation of school learners.

Lam et al. analysed the impact of baseline household income and scholastic ability on post-secondary enrolment in South Africa, using longitudinal data from the Cape Area Panel Study.43 Given the large impact of income on university enrolment and the enormous income differences between whites and Africans, income can in and of itself statistically account for the racial gap in university enrolment. However, this apparent effect of household income on subsequent post-secondary enrolment may pick up a wide variety of effects. It could indicate that credit constraints limit low-income students from continuing their studies. Or it may simply pick up the cumulative effects of income experienced since birth on human capital. Overall, the results suggest that a policy of lowering tuition or increasing financial aid would have only a very modest impact, if any, on the racial gap in university enrolment. Given the large racial gap in cognitive ability by the end of high school, financing constraints appear to be a relatively small component of the racial gap in university enrolment. This same set of variables can also fully explain the racial gap in other types of post-secondary education, conditional on not enrolling in university. In the case of non-university enrolment, however, they do find a significant

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43 David Lam, Cally Ardington, Nicola Branson & Murray Leibbrandt – Credit constraints and racial gap in post-secondary education in South Africa [144]
impact of baseline household income on enrolment, even after controlling for parental education and matriculation exam scores. This suggests that credit constraints may be a factor in explaining the racial gap in post-secondary education outside of university. Given what appear to be large economic returns to these types of post-secondary education, this could have important implications for inequality in the South African labour market. According to the authors, racial differences in post-secondary enrollment can be entirely explained by household income and matric exam scores. Interestingly, this research showed that Africans would have 12% higher university enrollment than whites if Africans had the same baseline income, parental education, and matriculation exam scores as whites.

When poverty studies are conducted around higher education, they usually focus on challenges students face in completing their studies because of their backgrounds and the lack of financial aid. What needs further investigation is how the internal conditions inside higher education institutions are changing as race and gender representations become diverse. At the Vaal University of Technology staff witnessed students scouring through dirt bins looking for food, and sleeping in offices or in lecture theatres, prompting a recognition of the extent and depth of student poverty within their own institution. Their presentation, based on the capability approach of Sen, argues that without targeted interventions to support and retain working class students, higher education institutions will remain privileged domains, creating new class-based conditions of inequity and inequality in South Africa. The research made key findings about why students drop out, including the fact that, contrary to expectation, it is not primarily due to academic results. The authors make specific recommendations for addressing poverty among university students at their institution, and more broadly.

To meet South Africa’s development needs, there must be an increase in the number of South Africans, particularly young black South Africans, accessing and succeeding at higher education, particularly in the fields of science, engineering and technology (SET). The Student Equity and Talent Management Unit (SETMU), based at the University of Witwatersrand, hosts projects to increase

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44 Bernadette Johnson & Dr Machika – A New Emerging Face of South African Higher Education; or Poverty and the (Broken) Promise of South African Higher Education [125]

45 Jennifer Koen, Rakhee Naik, Megan Reeves, Arthee Roopnarain, Simangele Lekhuleni, Brett Bowman and Zena Richards – Promoting equity of access to higher education in an unequal society [140]
access, support SET studies and contribute to equity and transformation in higher education. SETMU runs a number of programmes to prepare young South Africans, both academically and psychologically, for university life. SETMU hosts the Targeting Talent Programme/Talent Development Programme, which works with learners from all over South Africa who demonstrate academic potential to encourage university access and success. The programme has strongly emphasised a transformation agenda that enables previously disadvantaged learners to pursue careers historically reserved for an elite few. This strategy ultimately aims to foster development of future educated generations, thus working towards redressing the inequalities created under apartheid and enabling the South African economy to emerge as a global competitor. SETMU also supports Grade 11 and 12 learners from non-traditional feeder schools to universities, through academic supplementation and mentorship, to access higher education, through the Go to University to Succeed Programme.

Another important new source of energy in this area is the new Centre for Integrated Post School Education and Training (Cipset), set up under the leadership of Ivor Baatjes on the Missionvale Campus of the Nelson Mandela Metropolitan University in Port Elizabeth, which is focused on finding out what can be done to help people (especially the young) living in the surrounding townships who are formally unemployed to find more effective ways of improving their livelihoods.

Another organisation, established as part of the biggest single BEE equity transaction in South Africa, the Sasol Inzalo (“new birth”) Foundation focuses on skills development and capacity building in the critical areas of mathematics, science and technology. In 2010, the Foundation launched an undergraduate bursary programme, which currently supports 236 students at nine universities across the country, with the first cohort of bursars now in their third year of study. The Foundation partnered with StudieTrust to provide comprehensive financial, academic and psycho-social support to students, and conducts rigorous research to track their experiences and performance. Their presentation reflected on some of factors that enable and constrain tertiary access, and shared their experiences and challenges in providing financial and other support, including the role played by students’ aspirations and expectations. Their research dem-

46 Marietjie Vosloo, Murray Hofmeyr & Mpho Letlape – Supporting tertiary access for disadvantaged students: Lessons from the SASOL Inzalo Foundation’s bursary programme [287]
onstrated clearly that ‘success’ depends on more than academic factors, and highlighted the value of using an asset vulnerability/accumulation approach in understanding and alleviating poverty.

Working models

One of the most heartening aspects of the September 2012 conference was the constant reminder, largely from NGOs working on the ground, that creative activity – focused on strategies to overcome poverty and inequality – is possible and can be very effective. Indeed new models of action from the NGO sector may well prove to be one of the most long-lasting insights that participants took away from the gathering. There are a number of these models – in education, in agriculture, in health care – described through the pages of this Guide and many many more that were not presented at the conference. There is not space in this Guide to do more than briefly touch on some of the many organisations and models that contain valuable lessons for the renaissance of South African education. Not the least of these lessons is the visible demonstration that renewal and revitalisation is possible, on a large scale, even in the poorest and remotest parts of the country. And if there can be one, why not two? And if two, why not four? Perhaps that process, using the power of the exponential to double and then quadruple existing models that are working, is one that South Africa might begin to pursue as a significant part of our strategy to overcome poverty and inequality.

An inspiring case study came from one of the poorest areas of the country, rural eastern Mpu- malanga. Each year 1.5 million learners start school in Grade R but only 350,000 of these children pass in Grade 12. The school drop-out rate is a defining place to start in understanding the magnitude of the task of ensuring that all South Africans receive a good education.

Without targeted interventions to support and retain working class students, higher education institutions will remain privileged domains, creating new class-based conditions of inequity and inequality in South Africa

The many and varied reasons for the school drop-out rate provided the motivation for Penreach to focus its efforts – in a pipeline from early childhood development to career – aimed especially at reaching teachers and children in rural
communities. Penreach has a 21-year long track record, and in 2011 alone, they reached 2,000 teachers, 900 schools and 350,000 learners. As CEO David Wylde explains: “The start is conception. We run girls’ clubs in 8 targeted primary schools, with an average of 60 girls attending weekly. In those 8 schools, teenage pregnancies fell from 32 to 9 in just 18 months.” His presentation outlined the spectrum of interventions and support provided to learners and educators from ECD through primary school – focusing on keeping children at school and improving numeracy and literacy.

Desperate shortages of qualified healthcare staff (50% to 80%) at Mosvold Hospital, situated in deep rural northern Kwa Zulu Natal, was the motivation for the Umthombo Youth Development Foundation. Research indicated that health professionals of rural origin are more likely to practice in rural areas than their urban counterparts, and based on this research and the belief that despite the economic, social and educational deficiencies rural youth faced, if given the opportunity and appropriate support, they had the potential to succeed in becoming the healthcare professionals needed by their communities. The programme was established in 1992 at Mosvold Hospital and has since spread to 12 rural hospitals. To date 116 qualified healthcare professionals, covering 16 different healthcare disciplines, have been produced. As part of the agreement of their support, they are required to work at a rural hospital for the same number of years they were supported for, and thus all these graduates are currently, or have worked, at a rural hospital for a number of years. Of the 116 graduates, all of them are employed, with 114 being employed in permanent quality, well-paying jobs. Although no formal research has been undertaken, numerous graduates have shared anecdotal evidence about their ability to assist siblings to access better schooling and even tertiary education opportunities. This year 183 rural youth are being supported at university. Currently 12 rural Kwa Zulu Natal hospitals are benefiting from this initiative and support is being given to the Eastern Cape Department of Health to develop a similar scheme.

Researchers from the Children’s Institute shared how a community-based model of partnership could maximise the impact of CSTL (Care and Support for Teaching and Learning) in creating meaningful social change, and suggested some practical ways to achieve the paradigm shift.

47 David Wylde – Penreach: from conception to career (C2C) [303]
48 RG McGregor & AJ Ross – Investment in rural youth to become the healthcare professionals needed by their communities [161]
required for its effective implementation. CSTL is being promoted by Ministers of Education in the Southern African Development Community to ensure that all children have access to schooling, stay in school and make good progress. While CSTL concepts are not new, indeed they form the foundation of any good quality inclusive system of education, this approach acknowledges the need for a co-ordinated multisectoral response by families, communities and a range of government officials working with schools. CSTL holds promise for breaking intergenerational cycles of poverty, but the way in which it is interpreted and implemented will determine its success. A key challenge remains the quality of transformational partnerships that can be mobilised for transformation.

Illustrating this approach, Gcobani Zonke shared the experiences of Ubuntu, a project that assists vulnerable youth to access higher and further education and the world of work. From cradle to university, Ubuntu ‘raises’ children and helps them develop the necessary tools to succeed as adults. Ubuntu provides over 4,000 orphaned and vulnerable children and their families with life-saving interventions and essential educational services. Ubuntu is based in the community it serves, and is staffed by local people. Ubuntu serves children in a 7km radius around its headquarters, reversing the usual ‘going to scale’ model based on geographic expansion. Instead, they retain a tight geographical focus and offer a broad range of comprehensive services. In 13 years, over 130 students have moved into university. Enabling orphaned and vulnerable children to attend university takes more than just a scholarship – Ubuntu provides holistic services over many years to stabilise families and enable children to thrive academically, emotionally, and physically. The essential aspect of the model is using the child as the entry point into the home environment in order to stabilise an entire household and enable the child to flourish.

TEACH South Africa recruits competent university graduates with a passion to uplift communities through teaching as ambassadors in a programme aimed at improving learner performance in under-resourced schools. The process begins with a needs analysis of schools, selection and placing of ambassadors in schools for a mandatory two-year period. The ambassadors receive training and on-going mentorship, and are required to register

49 N Rudolph, L Berry & L Lake Breaking the cycle of poverty: What kind of change is needed for schools to make a difference? [236]

50 Elby Kabamadondo – The quest for equity, equality and quality in education: TEACH South African intervention [127]
for a postgraduate certificate in education. After their deployment, TEACH assists ‘ambassadors’ to access employment. Despite some challenges, including funding and employment opportunities, the model has shown some promising results.

With thousands of poor students denied access to higher education, and others performing poorly in their first year at university, IkamvaYouth drives social change by working with learners from township-based secondary schools.\(^{51}\) IkamvaYouth accepts learners based on their motivation, rather than their academic results. Established in Khayelitsha in 2003, the model has been implemented in seven townships in three provinces, currently reaching 711 learners in Grades 8 to 12, with plans to upscale significantly by 2016.

With public libraries, tertiary institutions and community centres providing free access to venues and infrastructure and volunteers responsible for all programme delivery, the expenditure per learner annually is under R5,000. Sustainability is ensured by deployment of transforming beneficiaries into benefactors – with matriculants returning as volunteers. Since 2004, 1,474 committed learners have benefited from IkamvaYouth programmes, with over 50% of participants returning as volunteers. Particularly significant is the quality of the matric passes – 67% of IkamvaYouth learner matriculants have accessed tertiary institutions, where the national average for black youth is below 10%. The presentation was complemented by screening of a documentary, ‘Flying Colours’, as part of the Festival of Ideas. The Monash South Africa Foundation Program (MSAFP) also prepares students for undergraduate studies and the social transition into higher education through a highly successful tutor-mentor programme, a volunteering scheme and a Service Learning component.\(^{52}\) With pass rates of between 75% and 90%, the programme illustrates the potential of alternative

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51 Joy Olivier – Youth pulling themselves and each other out of poverty through peer learning and support [210]

52 Debbie Lees, Lorraine Bennett & Craig Rowe – Community engagement – a worthy aspiration for higher education: An example from Monash South Africa [151]
pathways in promoting success for disadvantaged students groups in higher education, and offers an example of community engagement in action.

Several presentations at the conference outlined effective new models/approaches for youth empowerment working in different contexts.

Janet Jobson presented on Activate! Leadership for Public Innovation, a national programme that positions young people as the drivers of public innovation and social transformation, drawing together young leaders from diverse communities on a common journey. She cited economist Anirudh Krishna showing how innovative connections across caste-lines created pathways out of poverty in India and how entrepreneurs were most successful when they created opportunity for others too. However, it is difficult to seize opportunities when as a generation you are depicted as unemployable and uneducated. Steve Biko recognised the devastating nature of a deficit-based identity on the human psyche. A new approach is needed to harness the reinforcing nature of innovation, social connectedness and positive identities dubbed ‘active social capital’ by Krishna. This exciting programme aims to identify and support South African trendsetters, rooted in the real issues of their communities but modelling innovative nationally-relevant solutions for social transformation.

The Columba Leadership Academy activates young people to drive positive social change and share responsibility for leading social transformation by eliciting their self-belief and equipping them with a framework of values.

We need a pipeline of interventions – from conception to career – focusing on keeping children at school and improving numeracy and literacy, especially in rural communities. It can be done. In 2011, Penreach worked with 2,000 teachers in 900 schools reaching 350,000 learners.

David Wylde

The Academy addresses their social exclusion and shifts perceptions of young people as a major asset in public life. The Academy uses experiential learning for groups of youth facilitated by senior

53 Janet Jobson – Young people as drivers of public innovation: The approach and experience of the Activate! Leadership and Public Innovation Programme [122]

54 Chris Griswold – Mobilising young people as assets for development: The Columba Leadership Academy [262]
This by educating communities and building their power to advocate for equality and social justice. Since 2008, EE has worked in communities to reach the people most affected by the education crisis – learners, parents and teachers – through young activist ‘equalisers’. EE makes effective use of non-violent civic action including mass mobilisation, lobbying, litigation and media campaigns to raise public awareness. Representatives of EE presented their organising model, illustrated by experiences from work in Khayelitsha, complemented by a powerful slide presentation on EE’s campaign for Minimum Norms and Standards, screened as part of the Festival of Ideas.

Finally, at the end of this long chapter, let us remind ourselves that nurture, education and training are not investments in human beings that should be confined to early childhood nor indeed to children at school or students at technical colleges or universities but that they need to be part of life-long learning for everybody in society. In their account of dealing with burn-out and loss of morale amongst public health sector managers in rural communities, where they learn to care for themselves, their schools, communities and the environment. These young leaders then become role models of engaged citizens in depressed areas. Graduates are challenged to recruit their friends and use peer/social networks and partnerships with educators to drive positive change. Their value system and civic engagement experience builds confidence, efficacy and a sense of agency, enhances their employability and/or equips them to become successful entrepreneurs. In many cases graduates have started social enterprises in their schools. The Academy uses business discipline to achieve social good, and is committed to quality delivery. The Academy recently completed a successful Social Return on Investment analysis, a stakeholder focused audit and valuation of social and environmental impact. The Academy has trained over 600 young leaders and educators from 25 disadvantaged schools nationally, and aims to institutionalise the culture of learner-led transformation, reaching 5% of secondary schools within 10 years.

Last, but by no means least, is the powerful example of Equal Education (EE). This dynamic organisation sees the links between structural inequality in the education system and broader social and economic inequality, and aims to overcome this by educating communities and building their power to advocate for equality and social justice.55 Since 2008, EE has worked in communities to reach the people most affected by the education crisis – learners, parents and teachers – through young activist ‘equalisers’. EE makes effective use of non-violent civic action including mass mobilisation, lobbying, litigation and media campaigns to raise public awareness. Representatives of EE presented their organising model, illustrated by experiences from work in Khayelitsha, complemented by a powerful slide presentation on EE’s campaign for Minimum Norms and Standards, screened as part of the Festival of Ideas.

55 Joey Hasson & Brad Brockman, Equal Education – Organising for quality education [38]
areas, Tim Wilson and his colleagues\textsuperscript{56} described the process and initial results of a ‘Wellness for Effective Leadership’ programme run over the past three years with managers at provincial, district, sub-district and facility levels, mostly in rural areas. Begun as a crisis intervention, the focus is on ‘fixing the managers’ who run the system. Many people show renewed energy and enthusiasm for their work. A comment from an early participant was: “We learned to dig into ourselves.” And when they dig, many managers “find gold”.

This presentation was a timely reminder that underlying all the strategies for nurture, education, training and investment in people is the potential for the release of enormous positive energy for change. In the end the power to overcome poverty and inequality lies within people themselves. The challenge is to find ways to release it.

\textsuperscript{56} T Wilson, I Senekal, N Mogapi, A Bernstein – Digging into ourselves: Experiences of public health sector managers in rural areas [296]
CHAPTER 7

Health

While there were fewer contributions at the Towards Carnegie3 conference addressing the theme of health than on education, the papers, power-point presentations and displays at the Festival of Ideas provided much food for thought regarding future strategies, particularly with regard to maternal and child health; disability and mental health; TB and HIV/AIDS; and, looking at the system as a whole, the quality and affordability of health care services.

A great deal of work is being done in South Africa – both in terms of how to improve the health care system so that it responds more effectively to the needs of those who are poor,¹ and in terms of developing models of effective intervention on specific health concerns. However, many of these models and interventions – whether focused on paediatric malnutrition, TB, HIV/AIDS or the symbiotic combination of all three and more – remain to be written up and to become better known outside of the health field.

¹ See, for example, discussion in the previous chapter on Tim Wilson et al. – Digging into ourselves: Experiences of public health sector managers in rural areas [296]

Healthcare: Services and affordability

In a paper entitled, ‘What do we know about poverty, inequality and health in South Africa and what are the health system reform implications?’ Diane McIntyre and John Ataguba of the Health Economics Unit at the University of Cape Town presented a synthesis of key findings, based on extensive research they have conducted over the past few years. Their research shows that many households face catastrophic spending when using health services, and that despite considerably higher levels of illness amongst lower than higher socio-economic groups in South Africa, the poor benefit far less from health service use. The key policy implications of their research include:
1) Out-of-pocket payments for health care should be avoided; 2) The quality of primary care services should be improved and include direct delivery to households; 3) Transport to referral facilities should be provided for low-income patients; 4) Improved procurement and distribution of medicines to
all public sector facilities should be prioritised; 5) Provision of a comprehensive range of health services to all South Africans, funded through progressive pre-payment mechanisms, is feasible and would promote health service use in line with the distribution of the burden of ill-health. However, this requires improved pooling of health care funds (to promote both income and risk cross-subsidies) and active purchasing of services to promote efficiency and sustainability.²

Another contribution from these authors showed that financing health care through direct taxes (personal and corporate income taxes) and private health insurance contributions leads to a reduction in income inequality while financing through indirect taxes and out-of-pocket payments leads to an increase in overall income inequality. Based on international evidence from comparable studies, and given high income inequality in South Africa, general taxes that have been found to reduce inequality hold great promise for ensuring equitable health care financing and addressing income inequality. This requires that government increases its commitment to the health sector through increased

² McIntyre & John Ataguba – What do we know about poverty, inequality and health in South Africa and what are the health system reform implications? An overview of recent research [178]

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**Health care for all: Addressing the nursing crisis through self-help learning**

The digital revolution offers innovative opportunities to improve and extend basic and ongoing training in key areas, including the health and education sectors. In the health sector, traditional methods of centralised basic and ongoing training are no longer affordable, practical or achievable. In contrast, on-site facilitated learning based on individual study and group discussion using local mentors and regional facilitators is highly effective, cheap and self-empowering. Dave Woods gave a presentation on the highly effective Perinatal Education Programme (PEP), utilised by 70,000 healthcare workers in South Africa over the past 20 years. PEP provides self-directed course materials and a free web-based option. Evaluation in both urban and rural sites has showed significant improvement in cognitive knowledge, skills, and attitudes to patient care. A successful project was launched recently whereby nurses receive a weekly cell phone text message, bringing essential lessons in maternal and newborn care. The use of tablets, with or without internet connection, could expand the reach and impact of distance learning, and enable access for every health care professional to self-directed learning, thus improving patient care.

For more information see [www.pepcourse.co.za](http://www.pepcourse.co.za)
public spending. Many countries have been able to promote equitable economic development (i.e. growth as well as income redistribution) through increased public spending on social services. This has relevance to how the proposed universal health system or national health insurance for South Africa should be funded.³

Cleary et al. explored the affordability of – and barriers to – accessing free public health care in South Africa, with particular reference to three conditions key to the achievement of the MDGs: obstetric care, tuberculosis (TB) treatment and antiretroviral treatment (ART).

Key findings suggested significant differences in affordability between sites; in rural areas, costs were higher, ability-to-pay was lower and a higher proportion of households reported selling assets or borrowing money to cover these expenses. A key policy imperative is therefore to take patient costs into account in the design of services, given their importance in terms of access to care, adherence and outcomes. In particular, the high transport costs associated with clinic visits suggest a need to rethink the frequency of treatment collection for TB and ART; in the case of obstetric care, subsidised patient transport for referrals may be warranted.⁴

Another paper by Olufunke A Alaba et al. examined income-related inequality and utilisation patterns of health care among and between members of state-subsidised medical scheme, private medical scheme and non-insured civil servants in South Africa.⁵ Data were obtained in a survey of 1,327 civil servants in Gauteng, Western Cape, KwaZulu Natal and the North West provinces. Though most civil servants utilise private facilities, public facilities visits were concentrated among the lower class (low-skilled and skilled). Despite availability of state-subsidised medical insurance for 42% of the study population, the concentration indices were pro-rich for both outpatient and inpatient services, while the average outpatient visits to both public


⁴ Susan Cleary, Steve Birch, Natsaya Chimbindi, Sheetal Silal & Di McIntyre – Investigating the affordability of key health services in South Africa [53]

⁵ O Alaba, J Goudge, V Govender, B Harris, N Nxumalo, J Ataguba & M Chersich – Despite insurance coverage: Observed inequalities in health care utilisation among civil servants in South Africa [4]
and private facilities by the upper class was twice those of the lower-class civil servants. A social class gradient could also be observed in the use of outpatient healthcare. The difference in health service utilisation between public and private facilities may be attributed to the purchase of private health insurance that guarantees access to private facilities. However, observed variations in utilisation due to social class point to the need for a universal system where the use of health services is based on the need for care not ability to pay.

**Maternal and child health**

High levels of alcohol abuse, HIV prevalence and malnutrition in South Africa perpetuate historic patterns of inequality, impacting on the lives of children from conception. In sub-Saharan Africa, MDG4 outcomes (reduce mortality of children under five years) have worsened, and MDG5 outcomes (improve maternal health by reducing maternal mortality) have not improved. The primary causes cited correspond with the outcomes of untreated maternal mental illness. The capabilities approach to development attempts to highlight how poverty and gender inequality combine to lead to the failure of capabilities which these development goals attempt to address.

Philani Child Health and Nutrition Project reaches about 5,000 families living in informal settlements around Cape Town. Philani+ expands these services to improve antenatal, postnatal and mental health outcomes for mothers and babies through a programme of home visits conducted by paraprofessional ‘Mentor Mothers’. Initial findings show an encouraging improvement in neighbourhood outcomes for early infancy, and highlight the need to continue to track these children to establish the long term impact.

The Perinatal Mental Health Project (PMHP) intervention in Hanover Park shared their model to address deprivations and create capabilities among pregnant women through providing psychosocial support.

Rates of teenage pregnancy in South Africa are among the highest in the world – in 2009 nearly 80,000 girls younger than 18 fell pregnant, while in 2010 the figure was just over 70,000, with the...
highest incidence in KwaZulu-Natal, the Eastern Cape, Gauteng and Limpopo. In her presentation, Neloufar Kahn of the National Department of Social Development presented findings from a survey into teenage pregnancy with a special focus on the attitudes of teenagers, and its implications for the individual, family and society.\(^8\) The survey was conducted in five provinces – Limpopo, Eastern Cape, Mpumalanga, Gauteng and Kwa-Zulu Natal.

The Choice on Termination of Pregnancy Act is considered an important law in realising equality for women, permitting termination on demand in the first trimester and on socio-economic grounds in the second trimester.\(^9\) However, the Act is not being fully realised due to access barriers and provider opposition. Camilla Pickles of the Centre for Child Law at the University of Pretoria presented on research into women’s experiences that confirms the need for a new model to overcome obstacles in implementation.

### HIV/AIDS and tuberculosis

Research highlights that HIV in urban areas is a priority issue given the size of city-level epidemics in South Africa. HIV prevalence varies spatially, between and within provinces, districts and local municipalities, and between different settlement types – with prevalence in urban informal areas twice as high as in urban formal areas.\(^{10}\) To prevent new infections and mitigate the impact of HIV, a new strategic approach is needed. This should be based on good practice in prevention, targeting the upstream drivers and downstream consequences of HIV infection. Currently there is a real opportunity to participate in the revision of provincial, district and municipal strategic plans, which could lead to HIV spatially-based analysis and targeted strategies. The authors of this paper called for a multi-level programme of work in this vital area, requiring innovation, leadership and resources.

Linda-Gail Bekker et al. reported on the huge burden of TB in Cape Town, in relation to age and

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\(^8\) Neloufar Khan – Factors associated with teenage pregnancy in South Africa [137]

\(^9\) Camilla Pickles – Lived experiences of the Choice on Termination of Pregnancy Act 92 of 1996: Overcoming obstacles at ground level [215]

\(^{10}\) L Thomas, J Vearey & P Mahlangu – We can assist in spatially targeting HIV responses in areas of very high prevalence and incidence in South African urban informal housing areas: A strategic response [267]
HIV status. While there is significant incidence of HIV/TB co-infection, their research found that TB constituted almost half of the overall disease burden among those not infected with HIV. Given the circumstances in which TB spreads, the high level of transmission in the city is a critical public health issue.

Tuberculosis and HIV are described as a syndemic because they interact to increase disease. Although TB is preventable and curable, it is a leading cause of death among people living with HIV.

South Africa has the second largest incidence of TB in the world, with at least 60% of these people co-infected with HIV. TB and HIV present a significant challenge to rural development. In order to improve treatment outcomes, a programme was developed and implemented collaboratively between the Medical Research Council and the Foundation for Professional Development that’sit (TB, HIV/AIDS Treatment, Support and Integrated Therapy) focuses on improving access to TB/HIV services for the most vulnerable rural populations, through introduction of a ‘one-stop’ shop for patient care, working hand in hand with the Departments of Health in nearly 150 sites across four provinces. Guided by the motto, ‘Together, there is hope!’ the programme involves the patient, the health care giver and the community, and reaches out to those most vulnerable populations to improve health care delivery. It is based on a holistic approach, which includes development of food gardens and nutrition education as well as psychological support to both health care givers and receivers.

A presentation by the HIV and AIDS Research in Complex Contexts of Inequality (HARICCI) team at the University of the Western Cape explored the social determinants and dynamics of health, migration and disease, in particular HIV and TB, which require consistent treatment and care. The presentation identified the public health challenges in this context – including linkage to and continuity of care, and issues around drug resistance and exclusion from treatment, raised issues around the right to health of migrants and whether public services have the potential to become ‘nodes of inclusion’ rather?

12 Margot Uys & Ernesha Mazinyo – That’s it: Together there is hope! [283]
13 Christina Zarowsky – Look for New Heaven: Social Determinants and Social Dynamics of Health, Migration and Dis-ease [powerpoint]
Poverty and the enormous scope of the HIV/AIDS epidemic in South Africa pose challenges for an already overburdened health care system, with a shortage of qualified health workers, low wages and heavy workloads.\textsuperscript{14} Lay counsellors and community care workers provide Voluntary Counselling and Testing (VCT), a cornerstone of HIV-related health services. The conference heard about another innovative initiative by that’sit (a PEPFAR-funded joint initiative of the Medical Research Council and the Foundation for Professional Development, supporting the Department of Health) and KEYS, which uses creative arts to provide much-needed psychosocial support to build resilience among community care workers.

Tuberculosis remains a major public health problem in South Africa, with the greatest burden of disease borne by the poorest groups. If South Africa is to reach its TB-related Millennium Development Goal targets, alternative cost-effective models of treatment, which might reduce the burden of ill-health, productivity losses and direct cost burdens on already vulnerable households, are urgently needed.

Why then have we in South Africa failed to reduce the TB burden? A presentation by Nulda Beyers et al. explored the complex interaction between poverty, TB and health systems in South Africa in an attempt to answer this vital question.\textsuperscript{15}

Cost-effective treatment has been shown to work even in fragile health systems countries in Africa, based on five core elements: political commitment, diagnosis of the most infectious cases, standardised supervised treatment, uninterrupted supply of materials and a simple, standardised health information system.

Solly Benatar and Ross Upshur explored the connection between TB and structural poverty in order to understand why efforts to address these pressing global problems have failed, and recommended a series of complex actions needed to reshape macro-economic forces in the short and

\textsuperscript{14} Ernesha Webb & Andeline Dos Santos – Sick and tired: Using creative therapeutic strategies for HIV/AIDS counselors and community care workers [177]

\textsuperscript{15} Nulda Beyers, Ronelle Burger, Mareli Claassens, Peter Godfrey-Faussett, Helen Ayles, Sian Floyd, Rory Dunbar & Donald E. Enarson – The challenge of tuberculosis and poverty – a complex interaction [22]
longer term. In a study conducted as part of the REACH (Researching Equitable Access to Healthcare) global project, researchers identified cost and duration as important influences on TB treatment adherence, particularly for already vulnerable households. This has significant implications for the current TB treatment model, suggesting the need for a more patient-focused model, similar to the ART community treatment model.

In a thought-provoking presentation, Zethu Matebeni et al. shared the findings of a study which drew on the experiences of 24 self-identified HIV-positive African lesbians in South Africa, Zimbabwe and Namibia. Their stories illustrate graphically the continued challenges these women experience – with homophobia, stigma and prejudice – and underline the need for information and culturally sensitive programmes that address their specific health needs.

Disability and mental health

While the relationship between poverty and disability has been well established in international research, little work has been conducted to test this in a developing country context. Using the NIDS Wave 1 results, a research team from the University of Johannesburg explored the relationship between poverty and disability in South Africa. Their presentation at the conference made policy recommendations highlighting factors that could act as ‘leverage points’ for changing the relationship between disability and poverty, using the capabilities approach.

A national survey on youths’ strategies found that the needs and aspirations of disabled youth are similar to non-disabled youth, and that barriers to participation in education and employment relate more to the need for family support and access to financial resources and information and less to the person’s disability. Theresa Lorenzo from the University of Cape Town’ Disability Studies Programme in the Faculty of Health Sciences presented on a

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16 Solomon R. Benatar & Ross Upshur – Tuberculosis and structural poverty: What can be done? [20]
17 Stephen Birch, Veloshnee Govender, Jana Fried, John Eyles, Vanessa Daries, Mosa Moshabela & Susan Cleary – Does treatment collection and observation each day keep the patient away? Analysing the determinants of adherence among patients with Tuberculosis in South Africa [27]
18 Zethu Matebeni, Theo Sandfort & Vasu Reddy – “I thought we are safe”: SA lesbian women living with HIV [171]
19 Lauren Graham, Marguerite Schneider, Reem Mutwali and Jacqueline Moodley – Poverty and disability: Leverage points for change [96]
20 Theresa Lorenzo, Madri Engelbrecht and Lieketseng Ned – Youth and disability-inclusive development: collective agency and reciprocal capacity development [157]
multi-stakeholder collaborative project in seven provinces that provides regular spaces for engagement in capacity building and exploration of strategies to implement disability-inclusive development policies.

A study of community disability workers (CDWs) painted a promising picture of their potential to promote social change and increase inclusion for people with disabilities at a community level in impoverished settings.\[21\] The authors recommend the scaling up of community-based rehabilitation, and stress the need for increased training, deployment and career opportunities for CDWs.

Crick Lund of the Alan J Flisher Centre for Public Mental Health at the University of Cape Town made a powerful case for breaking the cycle of poverty and investing in mental health as an economic and social development issue.\[22\]

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21 Ermien van Pletzen, Margie Booyens & Theresa Lorenzo – Strategies of community disability workers to alleviate poverty and promote educational and economic inclusion of people with disabilities in rural communities in three Southern African countries [282]

22 Crick Lund – Breaking the cycle of poverty and mental illness: Drawing attention to a neglected health and development priority for South Africa [159]

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**Africa Health Placements: Powered by people**

With 20% of the world’s population, sub-Saharan Africa languishes with only 2% of the world’s physicians. Attracting and retaining health workers and competent management is critical to solving the massive public health issues in this region. Africa’s greatest obstacle in the public and particularly rural healthcare environment is a lack of qualified healthcare professionals. Saul Kornick of Africa Health Placements (AHP) presented on their work to enhance the healthcare delivery system in Africa through the provision of human resource solutions and services. Since 2005, AHP have placed over 2,500 health workers in rural areas in South Africa, reaching over 8 million people.

AHP is a human resources solutions and services organisation whose work has been changing the face of public health in southern Africa. AHP define their model as ‘social profit’ because their work, while mostly donor-funded, delivers ‘profit’ in terms of improved healthcare and social indicators. They work with a network of partners, including governments, the private sector and civil society. The bulk of their services are donor funded and delivered free of charge, but they are also partially self-sustaining through a professional locum placement service.

The presentation highlighted key issues in rolling out an effective National Health Insurance system that addresses structural inequalities between urban and rural areas, in order to avoid inadvertently reinforcing these inequalities.

For more information see www.ahp.org.za
CHAPTER 8

Government Policy

Theories of development about ways of overcoming poverty and inequality in society have spanned a wide range of possibilities over the past century and more since the harsh realities of the impact of the Industrial Revolution first manifested in the dark satanic mills of Victorian England. Writers and reformers – from Charles Dickens to Karl Marx to Beatrice Webb – described with passion the horrors of poverty and inequality in a society in which so many people, despite the wealth surrounding them, were pushed to the very edge of survival in lives that were all too short. Around the world for the past 150 years writers and thinkers have followed them in seeking to analyse the causes and to propose remedies. These have ranged widely from control by the state of the commanding heights of the economy and the abolition of capitalism to an unfettered free market with minimal rules and regulations and a tiny state sector focused on not much more than internal policing and external defence. But now, after the experiences of Russian Communism under Stalin, America’s Great Depression followed by Roosevelt’s New Deal in the 1930s and the banking crisis of 2008 with its roots in the Reagan-Thatcher deregulations of the 1980s, there is increasing consensus that whilst the market has a critically important role to play in the economic dynamism and well-being of a society it must also work within certain norms and, like traffic on the roads, be subject to rules to ensure minimal disruption and a well-ordered society.

Within this basic consensus there is, of course, huge room for disagreement both in terms of the norms which should be enforced and the degree to which the market itself should be subject to some regulation. But, to give one example of a moral or ethical norm about which there is general agreement, the buying and selling of human beings is no longer permissible. Whilst slavery does still exist it is illegal virtually everywhere and not even the most ardent free marketer would argue that it should be allowed in the interests of ‘economic freedom’. The moral consensus has shifted markedly over recent centuries. It is after all less
than 150 years since the United States of America itself fought a bitter civil war as to whether or not it was right to keep slaves.

Other norms, however, are by no means agreed. Thus whilst most people would pay lip-service to the idea that very deep inequalities are undesirable in a society, any suggestion that the ratios of, for example, average income of Chief Executive Officers to that of average workers under their authority should be regulated so that they do not rise above some maximum level would be heavily contested.

In the same way regulations protecting workers in the dangerous, difficult and uncertain conditions of mining, for example, might be regarded by employers as imposing undue costs (and hence reducing potential levels of employment) on an industry struggling to make ends meet whilst the miners – recalling working conditions over the 100 years before unions won the right to exist – would be unwilling to grant employers any leniency regarding the stringent application of labour regulations.

There are no final answers regarding appropriate norms or regulations but it is important that any analysis incorporates the thinking and arguments of different interest groups as it weighs up policy.

A number of papers presented at the Towards Carnegie3 conference – summarised briefly in this chapter – focused on various aspects of the role of the state in devising effective strategies to overcome poverty and inequality. But there were also significant gaps. One of the most important of these was the need for a critical examination of the South African government’s macro-economic strategy since 1994, together with a consideration of possible alternatives. This was an issue, however, which was considered in some depth at another workshop elsewhere in the country at much the same time as the conference.\(^1\)

And it raised issues that will need to be considered in the ongoing debate about strategies. For now, we note that this strand – like some others – is missing from the issues covered in this Guide.

In the first paper considering the role of the state,

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1 A think tank led by Prof. Vish Padayachee under the auspices of the Institute for Social & Economic Research at Rhodes University, involving social scientists also from Wits and the London School of Economics as well as officials from the National Union of Metal-workers SA (Numsa). *Daily Dispatch*, 15.11.2012.
Andries du Toit of PLAAS (Institute for Poverty, Land and Agrarian Studies) at the University of the Western Cape presented critical reflection on the broad ‘poverty consensus’ in post-apartheid South Africa, proposing more effective and creative ways to connect poverty to social and political action. In a second contribution, the author explored the crisis of structural poverty created by South Africa’s ‘truncated’ agrarian transition, and considered the potential of inclusive growth policies to transcend limitations of earlier policymaking. Du Toit argues that the politics of agro-food restructuring remain central to the prospects for inclusive growth.

The post-1994 period is characterised, perhaps most powerfully, by the fact that the economy recorded one of the longest periods of positive economic growth in South Africa’s history. However, one of the more vexing issues within the economic policy terrain has been the impact on social welfare, poverty and inequality post-1994. A study by Haroon Bhorat and Carlene van der Westhuizen of the Development Policy Research Unit at UCT evaluated the impact of this long-term economic growth on household poverty and inequality in South Africa. The results showed that while absolute and relative poverty had fallen, race and gender remain overwhelming determinants of the poverty profile. Despite the impact of social assistance in mitigating increasing income inequality, the large-scale expansion of the social security net is not a viable option, underlining the need for policy interventions aimed at job creation for the poor and unskilled.

Income inequalities in society reflect, and are compounded by, the unequal distribution of ownership of, and access to, crucial capital assets. Ilan Strauss and Keith Weeks suggested several avenues government could pursue, in partnership with the private sector, to implement an appropriate asset-based redistributive policy in South Africa, based on the capabilities approach to development, which

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2 Andries du Toit – The government of poverty and the arts of survival: Responses to structural poverty and inequality in South Africa [71]; The trouble with poverty: Reflections on South Africa’s post-apartheid poverty consensus [72]

3 Haroon Bhorat & Carlene van der Westhuizen – Pro-poor growth and social projection in South Africa: Exploring the interactions [280]
implies a more expansive definition of capital assets to include human, social and other forms of capital.4 Underdeveloped human capital, particularly in areas such as healthcare and education, perniciously undermines equality of opportunity by feeding in to inequalities of income, and vice-versa. Morne Oosthuizen of the Development Policy Research Unit at UCT presented on National Transfer Accounts (NTA), a new methodology focusing on four key activities: working, consuming, sharing and saving.5 While consumption occurs throughout life, paid work does not. The young and the elderly consequently experience lifecycle deficits — where consumption exceeds labour income — while those of prime working ages have lifecycle surpluses. Sharing and saving are the only mechanisms through which the young and the elderly can finance their deficits. Sharing in the generational economy can be disaggregated into private and public transfers: private transfers occur within and between households, while public transfers comprise cash and in-kind transfers between individuals/households and the state. The presentation

shared findings from the first full set of NTA for 2005, showing the patterns of NTA flows, paying particular attention to the relative importance of households and the state in financing the lifecycle deficit. It highlighted unique features of the South African NTA, relating these to labour market and other socioeconomic patterns.

While the NPC engages with the complex structural challenges that influence the outcomes and life chances of the poorest people in South Africa, it is equally important to establish the extent to which initiatives on the ground can translate poverty-centred approaches at micro levels into welfare-enhancing development strategies. Development and inequality challenges in cities require integrated efforts to address the broad range of determinants of health and development outcomes. Local authorities play a pivotal role in guiding all actors towards development goals, but are experiencing major challenges in improving outcomes. Two contributions explored initiatives to address these challenges.

A pilot project to localise Millennium Development Goals (MDGs) in Integrated Development Plans (IDPs) in Mangaung and Buffalo City Metropolitan Municipalities offers an opportunity for innovative collaboration between government and research-

4 Ilan Strauss & Keith Weeks – An asset-based approach to addressing poverty and inequality in South Africa: Tentative recommendations [256]

5 Morne Oosthuizen – Social protection and the economic life cycle: National transfer accounts estimates for South Africa [211]
Mediating from the margins

Government’s animating vision for the development of informal businesses is that with the right supply-side inputs, micro-enterprises will flourish, formalise, contribute to economic growth and create jobs. Marlese von Broembsen of the Institute for Development and Labour Law at UCT interrogated this policy perspective, arguing that informal businesses are structurally excluded from participating in formal markets, other than as consumers (for personal or business consumption). Even for the small number of manufacturing businesses, educational and spatial inequalities and the structure of the market mean that informal manufacturing businesses are largely reliant on intermediaries to facilitate their participation in the formal economy.

The paper draws on a study of intermediaries by the author, done as part of the Second Economy Strategy Project. Using the optic of the ‘informalisation’ perspective on the informal economy, the paper interrogated government’s policy perspective which risks conflating brokers (who contribute to the informalisation of labour) with intermediaries (who facilitate access to markets by informal producers, which would otherwise be inaccessible to them). The paper makes a case for a more enabling institutional environment to facilitate the collective organisation of intermediaries and suggests that the BEE legislative framework potentially offers a policy space to shift some of the responsibility for realising decent work for informal producers from intermediaries to South African retailers.

M von Broembsen – Mediating from the margins: The role of intermediaries in facilitating participation in markets by poor producers [285]

Initial findings support the need for improving the systems and functioning of local government to address inequities through strategic responses at local level. Viviene Taylor from UCT’s Department of Social Development and an NPC Commissioner, and doctoral candidate in the department, Chance Chagunda, explored the potential for linking theory with practice in creating pathways out of poverty through case studies on two Cape-based ‘bottoms up’ initiatives.

A key area of government policy affecting poverty and inequality is employment or job creation. This remains a critical challenge. Employment and access to livelihoods should be a central way of improving equity and reducing marginalization, but the rates of unemployment and inactivity are still so high, and the path to addressing them apparently elusive. Miriam Altman, who serves on the National Planning Commission, shed light on the Employment Scenarios process and shared key lessons for an integrated development approach to employment policy in the South African context.


7 Chance Chagunda & Viviene Taylor – Pathways out of poverty: Lessons of experience in linking micro strategies with macro frameworks [264]
Some of these insights relate to challenges of a resource-based middle income economy, the falling employment share of goods producing sectors, the implications of an expanding services share, and the role of the state in underpinning a social floor in this context.  

In an attempt to offset job losses, in 2007 the South African government imposed import quotas on clothing and textile products imported from China, causing a dramatic decrease in imports. Laurence Edwards and Neil Rankin drew on a unique dataset of monthly retail prices to estimate the impact of these quotas on consumer prices, finding evidence of strong increases (5 to 11%) in the prices of quota restricted products relative to non-restricted products. The study found stronger price increases in low priced restricted products (relative to non-restricted) compared to high price restricted products, results consistent with quality upgrading arising from quota restrictions. They also reflect the regressive nature of quota protection with poor consumers most adversely affected. In a paper entitled “Institutional wage effects: Revisiting union and bargaining council wage premia in South Africa”, Haroon Bhorat et al. from the Development Policy Research Unit of the University of Cape Town showed a significant drop in the union wage premium from around 40% to 6%, highlighting the importance of including firm and work characteristics in the wage equation. The second contribution of their study was to estimate bargaining council wage premia within the private and public sectors.

In a practical example of job creation, the Ethakweni Zibambele Poverty Alleviation Programme was initiated in 2003 as a pilot project, and employs around 6,000 active beneficiaries to maintain roads. The programme offers a cost-effective way to provide services with buy-in and involvement from the community. The presentation provided a guide to enable replication and adaptation as a best practice model, aimed at government departments, private bodies and institutions.

The informal sector provides a means of survival and livelihoods for those marginalised from formal employment and business opportunities. However,

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8 Miriam Altman – The challenge of employment creation in South Africa [7]
10 Haroon Bhorat, Carlene van der Westhuizen & Sumayya Goga – Institutional wage effects: Revisiting union and bargaining council wage premia in South Africa [93]
the South African state continues to circumscribe informal activities and pursue efforts to ‘migrate’ informal micro-enterprises towards the formal sector. A case study of Brown’s Farm, Philippi, on the Cape Flats illustrated – with the aid of spatial maps and analysis – the scope and scale of threats to informal economic life posed by law enforcement and regulation. The paper underlines the consequences for poverty reduction and livelihoods of disallowing economic informality.

Debate over labour market regulation in South Africa faces the same triad of issues that dominated the transition from apartheid to democracy: unemployment, inequality and a skills shortage. The overall objective of labour market regulation is to promote the security of those who work for a livelihood in a manner consistent with the requirements of economic growth. The goal of promoting secure work will result in conflicting policy priorities which may require political compromises. While the problems are well-known and a range of proposals have been put on the table, consensus and implementation remain lacking. Paul Benjamin from the Law Faculty at UCT proposed a broader concept of labour market regulation as a framework for a more encompassing debate over the future direction of law and policy.

COSATU’s Neil Coleman analysed reasons for the failure to transform the apartheid labour market, in a context in which collective bargaining institutions are constantly destabilised, there is a lack of coherent wage policy to address poverty and inequality amongst workers, and there is no coherent framework to link labour market strategies and institutions to broader economic development. His presentation proposed measures to address these challenges, including: a national minimum wage; development of federation-wide collective bargaining strategies; introduction of mandatory centralised bargaining; universal income support for all adults; and rescue measures for crisis-hit industries, with support of government. This package of labour market and social protection measures should lay the basis for national agreement connected with an overhaul of macro-economic policies. Abhishek Nath and Amit Mishra of UCT explored labour regulation evolution and inequality in an attempt to

12 Andrew Charman, Laurence Piper & Leif Petersen – Informality disallowed: State restrictions on informal traders and micro-enterprises. Case evidence from Brown’s Farm, Philippi in Cape Town [45]

13 Paul Benjamin – Labour law beyond employment [21]

14 Neil Coleman – Concept paper: Towards new collective bargaining, wage and social protection strategies. Learning from the Brazilian experience [54]
open up new discussion around labour law determination.\textsuperscript{15} They examined changes in labour regulations and legislation in selected countries using the Gini index as the major metric to represent inequality because of its simplicity and extensive use in current research.

In the context of extremely high unemployment there should be mechanisms to save jobs at all times, and not only in periods of economic downturn. A great deal of emphasis is placed on the need for job creation, but perhaps insufficient attention is placed on retaining existing jobs and preventing job loss. The Commission for Conciliation, Mediation and Arbitration (CCMA) addresses job insecurity through section 189A (large scale) retrenchments and processing workplace-based training layoff applications, involving the NEDLAC-initiated Training Layoff Scheme (TLS).\textsuperscript{16} Increasingly, the CCMA has found that, by applying a holistic, multi-faceted strategy and partnering with other institutions and government departments, it is able to save jobs and contribute to providing long-term solutions to business distress and job loss. Their presentation provided an analysis of the sectors and situations in which implementation of the TLS has been most successful, and identified strengths and weaknesses using case studies. The presentation concluded with recommendations for institutionalising partnerships across a range of organisations to find synergies and pool resources to save jobs and businesses, and redesign TLS as a permanent feature of the South African labour market.

Elne Jacobs, Haroon Bhorat and Carline Van Der Westhuizen of the Development Policy Research Unit at UCT explored the impact of employment contract dispute resolution by the CCMA on the labour market.\textsuperscript{17} Labour market institutions govern and manage the labour market through employer and employee organisations; the courts of law; dispute resolution

\textsuperscript{15} Abhishek Nath & Amit Mishra – Labour regulations evolution and inequality [194]

\textsuperscript{16} Winnie Everett & Jeremy Daphne – Exploring the full use of partnerships and a multi-faceted job saving strategy to more effectively address job loss and deepening poverty [79]

\textsuperscript{17} Haroon Bhorat, Carlene van der Westhuizen & Elne Jacobs – The impact of employment contract dispute resolution by the CCMA on the South African labour market [119]
institutions and so forth – and their contribution to labour market rigidity is a topic of fierce debate. The CCMA was established in terms of the Labour Relations Act 66 of 1995 to provide an effective and efficient dispute resolution service between employers and employees through conciliating, mediating and arbitrating disputes, the majority of which are referred by employees, thus providing access to social justice for many workers in South Africa.

The South African Government is increasingly experimenting with policies and programmes to tackle unemployment, including the Jobs Fund and Youth Wage Subsidy to complement existing Active labour Market Policies (ALMPs). Eddie Rakabe of the Financial and Fiscal Commission reviewed these newly introduced ALMP programmes against best international practices and the context of unemployment conditions. He concludes that both the Jobs Fund and Youth Wage subsidy require some redesign to maximise labour market outcomes.

Both the Jobs Fund and Youth Wage subsidy require some redesigning to maximise labour market outcomes

Eddie Rakabe

Sean Archer of SALDRU and the Council for Higher Education and Training (CHET) summarised key issues in relation to South Africa’s National Skills Development Strategy and proposed that further research is needed to devise effective policy. He pointed out that only government has access to the information and resources needed to undertake economy-wide studies.

The standard competitive model predicts that firms will cut jobs in response to the minimum wage. A study by Haroon Bhorat et al. examined the impact of minimum wage laws on the retail, domestic work, forestry, security, and taxi sectors using 15 waves of biannual Labour Force Survey data for 2000 to 2007. The results suggested that whilst there was no significant impact of the laws at the extensive margin, there was some evidence of an adjustment at the intensive margin.

In the context of high unemployment, social as-

18 Eddie Rakabe – Design and policy implementation issues in South Africa’s Jobs Fund and Youth Wage Subsidy [225]


20 Haroon Bhorat, Ravi Kanbur & Natasha Mayet – The impact of sectoral minimum wage laws on employment, wages and hours of work in South Africa [23]
sistance is critical to attempts to alleviate poverty. Child cash transfer programmes are widely used as policy instruments to address child poverty and improve child health outcomes in developing countries. Of 18.6 million children in South Africa, 11.3 million live in poverty. In 2009, the Department of Social Development, the South African Social Security Agency and UNICEF South Africa commissioned the first rigorous impact evaluation of the Child Support Grant (CSG), which reaches over 10 million children each month. The qualitative research found that while access had improved significantly, take-up rates for the CSG for infants remain relatively low. Despite finding that the grant is used primarily to provide food for households, the results confirmed its positive developmental impact in promoting nutritional, educational and health outcomes for millions of children. Early receipt significantly strengthens impact, reduces poverty measured along a number of important dimensions, promotes better gender outcomes and reduces vulnerability. The study also found that adolescents receiving the CSG were more likely to have positive educational outcomes, less likely to resort to child labour, and significantly less likely to engage in high-risk behaviours.

Researchers from the School of Public Health at the University of the Western Cape, the Medical Research Council, the Department of Social Policy and Intervention at Oxford University, and UNICEF collaborated on studies of the impact of the CSG, and explored barriers to access. Findings include that the poor seem to ‘cluster’ around social grants as the CSG, along with the old age pension, was often the only source of income in households. However, CSG recipients also experience frequent food shortages, highlighting that the grant needs to form part of a basket of strategies to alleviate poverty among children and their families. Possessing a birth certificate was found to be the strongest predictor of CSG receipt, while other factors independently associated with CSG receipt were an HIV-positive mother, and a household income below R1,100.

Many children live with extended family members in South Africa, yet the new Children’s Act focuses on court-ordered foster care rather

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than kinship care. Ann Skelton of the Centre for Child Law explored social assistance arrangements which cause families caring for children to favour the foster care model, with its more lucrative cash grant, over the informal model of primary caregivers receiving the smaller child support grant. The presentation concluded with a recommendation for more sustainable solutions.\textsuperscript{23} Paula Proudlock of the Children’s Institute spelt out the implications of various reform options on the provision of social assistance to various categories of children living in poverty.\textsuperscript{24}

Ardington et al. found that large cash transfers to the elderly lead to increased employment among prime-aged adults, primarily through labour migration. The increase in household resources through the pension can be used to support migrants until they become self-sufficient, and the presence of pensioners to care for small children allows prime-aged adults to look for work elsewhere.\textsuperscript{25}

A 2007 study on the characteristics of recipients of the Disability Grant in urban (Western Cape) and rural (Eastern Cape) areas found that the majority of men and women with disability surveyed in both areas received the grant.\textsuperscript{26} The grant appears to be an important source of income for rural households with family members living with a disability in particular. The study raised questions about how ‘disability’ is perceived, and suggested the need to review the role of medical doctors as ‘gatekeepers’.

\textsuperscript{23} Ann Skelton – The story of 110 000 foster child grants that stopped being paid in 2010/2011 [245]

\textsuperscript{24} Paula Proudlock – The case of Child SS and 1.1 million others like him – orphan children in need of social assistance [223]

\textsuperscript{25} Cally Ardington, Anne Case & Victoria Hosegood – Labour supply responses to large social transfers: Longitudinal evidence from South Africa [9]

\textsuperscript{26} Jennifer Jelsma, Soraya Maart, Arne Eide, Mzolisi Toni & Mitch Loeb – Who gets the Disability Grant in South Africa? An analysis of the characteristics of recipients in urban and rural areas [121]
CHAPTER 9

Job Creators

There seems to be general consensus across a wide spectrum of South Africa’s political economy – including the trade union movement – that job creation must lie at the heart of any strategy to overcome poverty and inequality. There are naturally differences of opinion as to the appropriate trade off – where it exists – between labour costs (including wages) and job creation but clearly the problems with which we are wrestling are made that much harder to overcome with unemployment at 30% or more, particularly amongst those aged under 35 years. In the context of this massive structural unemployment, there is also much talk of appropriate industrial policy and the importance of labour-absorbing growth. Given this reality there was a good deal of discussion at the Towards Carnegie3 conference about ways and means of generating new jobs. Taken as a whole, the set of presentations was far from comprehensive in the sense that strategies for job creation were not examined in all sectors of the economy, such as manufacturing in general or the IT sector, but the presentations provided a useful base on which further work can be done in the years ahead. There is clearly need for a systematic analysis, product by product and of each sector, to identify the potential for increasing output, sales and employment whilst balancing the need to move towards greater environmental sustainability.

Anthony Black and Reviva Hasson of UCT argued that the ongoing bias in favour of heavy industry has been damaging, not only for employment, but also for economic growth, and has resulted in South Africa being one of the world’s most emission-intensive economies. In their presentation, they explored some of the benefits and challenges involved in tilting the playing field toward labour-absorbing growth.¹

The conference heard several presentations focusing on aspects of entrepreneurship, including the role of small, medium and micro enterprises (SMMEs), of ‘business’, of co-operatives and of the

¹ Anthony Black and Reviva Hasson – Capital intensive industrialisation and comparative advantage: Can South Africa do better in labour demanding manufacturing? [29]
informal sector. (The particular potential of agriculture in generating jobs has already been considered in Chapter 4.) It is clear that SMMEs can play a vital role in reducing unemployment; the NDP envisages that 90\% of the jobs to be created will be located in small and expanding firms. In 2012, the Centre for Development Support, University of the Free State and the Flemish International Cooperation Agency collaborated in establishing the Southern African SME Observatory to develop resource and research capacity for improved monitoring of SME economic performance and the impact of policies and international, national, regional or provincial developments on their development. In another significant contribution, the Human Resource Development Council Technical Task Team on Enabling Entrepreneurship presented practical suggestions on stimulating a culture of entrepreneurship in South Africa, though: 1) Creation of a national virtual incubator with relevant information; 2) Bolstering entrepreneurial activity within the university system; and 3) Promoting creative and innovative teaching methodologies in the basic schooling system. Ronney Ncwadi of the University of Fort Hare and Pierre Le Roux of Nelson Mandela Metropolitan University presented on the findings of an econometric analysis of the impact of public funding on small business development of SMMEs.

Technology and innovation are important drivers of economic growth. Recent research shows that disruptive innovations are increasingly transforming industries and markets in South Africa, yet little is known about how disruptive business model innovations emerge – and the implications for policies in developing economies. Addressing this gap, Solomon Habtay

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2 Johannes Wessels & Willem Ellis – Are SMEs the answer for job creators? Towards the operationalization of an SME Observatory [292]

3 Rob Stead, Shahida Cassim, Taddy Bletcher & Darryn von Maltitz – Enabling entrepreneurship through education and collaboration: Some initiatives and input from the Human Resource Development Council Technical Task Team on Enabling Entrepreneurship [251]

4 R Ncwadi & P le Roux – An econometric analysis of public finance on the development of small, medium and micro enterprises in South Africa [196]

5 Solomon Habtay, Chimwemwe Chipeta & Mengsteab Tesfayohannes – Business model innovation for the bottom of the pyramid markets through upstream and downstream collaborations [99]
(Wits), Chimwemwe Chipeta (Wits) and Mengsteab Tesfayohanne (Sigmund Weis School of Business, USA) drew on case studies to propose a conceptual model for bottom of the pyramid markets, through upstream and downstream collaborations, and explored some theoretical and policy implications.

South African society and business co-exist within two economies – characterised by structural features of high and low value markets, disconnection to internal and global value chains, and underdevelopment, with strong racial connotations. Government policy to support this sector is largely top-down and generic as it seeks to address wider problems of poverty and inequality. Yet ‘second economy’ activities are the major source of livelihood and job opportunities for the majority. Eddie Rakabe, a researcher at the Financial and Fiscal Commission, shared the findings of a study exploring how to unlock additional value from second economy industries, which suggest that interventions should build on the strength of self-initiatives and incentivise business in the margins to invest in their own capabilities and growth.

The last decade has seen a tremendous shift from ‘traditional’ township economic activities, as Eckson Khambule of the University of KwaZulu Natal showed in a case study of Tsakane township, east of Johannesburg. His paper illustrates the creative strategies people find to deal with poverty and unemployment, and explores the socio-economic dynamics that give rise to new entrepreneurial practices in townships. In another contribution on the topic, Cecil Madell presented findings from a case study of a Cape Town township to illustrate economic survival strategies in marginalised communities. His research considered what needs to be changed in terms of theory and implementation to ensure LED, business stimulation and poverty reduction strategies are appropriate, relevant and effective in this context.

It is equally critical to understand – and address – factors that inhibit individuals from engaging in micro-enterprise.

A case study from Khayelitsha conducted as part of the Khayelitsha Wave III survey explored

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6 Eddie Rakabe – Unlocking the value of “second economy” business activities in South Africa [224]

7 Eckson Khambule – On the changing nature of township economy: From spaza shops to shopping malls [136]

8 Cecil Madell – LED, business stimulation and poverty reduction within townships in South Africa: A paradox between policy and lived reality [163]

9 Paul L. Cichello, Colin Almeleh, Liberty Mncube & Morne Oosthuizen – Perceived barriers to entry into self-employment in Khayelitsha, South Africa: Crime, risk and start-up capital dominate profit concerns [50]
these factors in this large township. While crime is perceived as the dominant hindrance, a number of other factors emerged, including access to capital, transport costs, and community ‘jealousy’, on par with or surpassing concerns over profitability or government regulation. Although there is broad policy acknowledgement that the informal economy sustains family and community economies in townships across South African cities, most analyses frame issues of the informal economy as narrowly local, with limited connections to the formal economy, and thus as organised around subsistence and broadly uncompetitive.

In his 2011 State of the Nation address, President Zuma recognised the importance of the small business sector in employment creation. While local banking institutions endorsed this and re-committed themselves to support small businesses, a case study presented by the Restitution Foundation on their work with Beirowplas Recycling in Worcester illustrated how bureaucracy continues to constrain small business development.

The change of perception of credit – from emergency lending to a flexible tool of financial management – is crucial in a society that has to develop further economic opportunities for much of the population. Limiting access to credit also limits these opportunities. However, changing perceptions of credit requires development of a political framework to prevent or, at least, restrict societal damages. Jurgen Schraten of the Human Economy Programme at the University of Pretoria presented on the consumer debt crisis, reflecting on procedures for preventing reckless lending beyond the National Credit Act and the necessity of financial education and compulsory practices of affordability measurements.

Given the new policy emphasis on the stimulation of agencies and practices in the space between the state and market, there is a surprising lack of practical detail and understanding of how the hidden dynamics of social and cultural capital formation can be reinforced through strengthening networks, accessing under-used resources and utilising volunteer human capital. A team from the Department of Development Studies at Nelson Mandela Metropolitan University used case studies to illustrate the potential of worker-oriented cooperatives within the Eastern Cape.

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10 Deon Snyman & Mike Winfield – Banking barriers to economic redress: A case study of a small business [246]

11 Jurgen Schraten – Managing a consumer debt crisis [238]

12 R Haines, A van den Berg & A Shelver – The third sector and poverty reduction: Snapshots from the Eastern Cape [276]
Who creates jobs? Who destroys jobs?

A presentation at the September conference, subsequently published on the Econ 3x3 website as part of the structured debate on unemployment and employment, income distribution and inclusive growth in South Africa, was that by researchers from Data First at UCT working with a colleague in StatsSA on the process of job creation and job destruction within South African firms over the period 2005–2011. The conclusion to their analysis of over 15,000 firms was extremely interesting:

“We find that around 10% of existing jobs are destroyed each year, while the number of new jobs created each year accounts for around 9.5% of existing employment. Thus we find that around 20% of the total of formal jobs outside agriculture and mining are either created or destroyed in each year (this is the gross reallocation rate).

Since the available data indicate that we underestimate the number of jobs created by births and reallocation (because small firms at the sample changeovers are not indicated), this reallocation rate is comparable with those found in other countries. For example, Haltiwanger et al (2008) find job reallocation rates of 25% in OECD economies and 30% in Latin American economies.

Our estimates are also not inconsistent with the analysis of household survey data by Banerjee et al (2008), who find a high level of mobility at the individual level when considering changes in the workers’ state of employment. For example, using the Labour Force Survey panel data from between 2001 and 2004, they find that of those with formal sector employment, 16% changed into another employment state (e.g. informal employment or unemployment) after six months.

These results mean that there is a relatively high amount of reallocation of employment across firms. This suggests that there may be lower rigidities in the South African labour market than is sometimes believed (especially with reference to the effects of labour legislation).

Andrew Kerr, Martin Wittenberg & Jairo Arrow – Who creates jobs, who destroys jobs? Small firms, large firms and labour market rigidity. Available at www.econ3x3.org

Researchers from UCT, in partnership with the Valhalla Park United Front Civic, engaged in a process of interviewing and mapping every informal sector business in the neighbourhood, exploring the interlinking of household economies. The research reveals an intimate set of connections that shape business logics and practices in the local Valhalla Park economy. The paper considers the specific difficulties of running a business in the context of poverty, including unreliable and inadequate incomes, challenges of credit and of operating business on a small scale. It reflects on the community based, as well as livelihood logics that both motivate local business owners and sustain their livelihoods. The final

13 Sophie Oldfield – Household and informal economies: Intertwining lives and logics [209]
section engages with the notion that the Valhalla Park economy, instead of being a vehicle driven primarily to maximise profit, forms an intimate part of peoples’ lives. This more multifaceted and embedded analysis deepens narrow notions of the informal economy, its limits and logics.

The A2B Entrepreneurial Transformation Movement (ETM) aims to alleviate poverty through an innovative, integrated enterprise and skills development strategy, training service providers to transform their community development programmes and clients into social entrepreneurs, and transforming markets to generate social change and unlock wealth on a local level.14

Daan Toerien and Maitland Seaman of the University of the Free State used System Dynamics to explore local economic development in over 140 South African towns.15 They conclude that development planning that focuses on regeneration by addressing ‘run-of-the-mill’ entrepreneurship linked to ‘markets of proximity’ is in danger of producing ‘musical chairs’, with one enterprise replacing another without growing the local or regional economies. Drawing on the examples of successful ‘special entrepreneurs’, they propose that politicians and officials be persuaded to consider low-tech enterprises that produce differentiated services within LED planning.

Other contributions highlighted the challenges – and opportunities – provided by a global economic era. Unathi Sonwabile Henama of Tshwane University of Technology pointed out that the tourism industry has featured as a priority in every government policy related to economic growth and sector strategies since 1994.16 He outlined its potential benefits and stressed the need for an enabling environment to reduce red tape and encourage growth in the sector. Teboho Pitso and Malefane Lebusa described the establishment of the Institute for Innovation and Entrepreneurship at Vaal University of Technology in a context of growing unemployment and underemployment among graduates.17 The Institute focuses on entrepreneurship and enterprise development, providing skills training for local businesses, and engaging in research.

14 Vivienne Zwennis – A2B Transformation Movement [308]
15 Daan Toerien & Maitland Seaman – Paradoxes, the tyranny of structures and enterprise developments in South African towns [269]
16 Unathi Sonwabile Henama – Tourism, educational tourists and global mobility: Strategies from the tourism industry to address poverty and inequality in South Africa [110]
17 Teboho Pitso & Malefane Lebusa – Institute for Innovation and Entrepreneurship at Vaal University of Technology: Conceptions, distinctions and impact [150]
CHAPTER 10

Community Mobilisation

Any analysis of poverty and inequality must focus, as this Guide has done, on economic dimensions such as employment generation, urbanisation or the role of agriculture and on such ‘human investment’ issues as education and health care. All of these inevitably involve interaction between government policy and the role of private individuals or organisations. But there is one big area that lies largely – although not completely outside – the reach or capacity of the state. This is the work of what may be defined, broadly, as civil society – ranging from small self-help groups to national programmes aimed at stimulating community transformation, with a wide range of activities and organisation in between. The organisations that attended the conference were but a small sample of this large and rich network working within, and often driven by, poorer communities across South Africa. While the work of some of these NGOs has been profiled in other chapters, in this chapter we share brief descriptions of the work and impact of other NGOs and role players involved in transforming communities.

If South Africa is to make the shift towards developmental state, its top-down, needs based and service delivery oriented approaches need to be balanced by bottom-up, asset-based and community-driven initiatives that empower citizens and communities from the inside out.1 Across South Africa, in scores of communities in every province, projects utilising the Asset Based and Community Driven (ABCD) approach to development are being piloted, with promising results. These pilots are self-directed by communities, yet allow external agents to responsively co-invest in community assets together with the community through a variety of mechanisms. It appears that when communities drive their own development, they are truly empowered from within.

Another presentation shared a community asset mapping technique (CAMP) developed by UNISA, the Greater Rustenburg Community Foundation and communities in the Bojanala Region of the North

1 Sebastian Mathews – Asset based community driven (ABCD) development in South Africa: “Rebuilding communities from the inside out” [173]
West Province.² CAMP empowers communities to identify their own entrepreneurship and livelihood strategies and income-generating opportunities. CAMP advocates that the success of any grassroots change depends on partnerships with a multitude of organisations, including NGOs, government, civil society, business, and institutes of higher learning, who are willing to allow communities to decide their own priorities, and to provide funding, mentorship, skills, and continuous monitoring.

The NDP goals include: creating jobs and livelihoods, transitioning to a low carbon economy and transforming urban and rural spaces. A presentation by Janet Cherry of Nelson Mandela Metropolitan University described three projects in the Nelson Mandela Bay Municipality, to illustrate how these goals can be achieved.³ The model of self-sufficient and sustainable community economies has been explored in South Africa in only very limited ways, often in relation to ‘eco-villages’ which do not address the needs of the very poor. The paper argues that economic localisation is not only viable but can create greater independence and economic empowerment of the poor; and that integrated, sustainable settlements may have greatest chance of success in those communities which have the least to begin with.

In Limpopo Province, the provincial government has identified inequality, poverty and unemployment as key strategic policy issues, but there is a challenge posed by a lack of provincial data. This motivated the Limpopo Department of Economic Development, Environment and Tourism, in partnership with the Centre for Democratising Information, to conduct research using the capabilities approach in the Thabazimbi area.⁴ Some of the key findings and the implications for policy and implementation were presented.

Herman Geyer presented on local economic development initiatives implemented in community property associations in the Royal Bafokeng Nation to explore the prospects for reorientating pro-poor local economic development using an institutionalist approach.⁵

Many development issues in South Africa have

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² Melanie Nicolau – Community asset mapping as a tool to achieve roots-driven change in the rural communities of the Bojanala region, North West Province, South Africa [200]
³ Janet Cherry – Localisation as a strategy for sustainable poverty alleviation: Some action research experiments in Nelson Mandela Bay [46]
⁴ Jaco Mostert & Melani Prinsloo – The South African Community Capability Study in Limpopo Province [189]
⁵ Herman Geyer – Reorientating pro-poor local economic development to an institutionalist approach [90]
historically not responded adequately to the needs of the community especially the poor and the disadvantaged. The majority of South Africans have been poor and marginalised for a long time thus it is imperative that they understand their part in local development and how plans and decisions can have a positive effect on their socio and economic conditions. Madney Hallim of the Community Based Development Programme shared their experiences of LED and lessons from their interaction with communities in Alexandra Township, Diepsloot and Ivory Park, where most of the population lives in informal shacks with no security and electricity.

The Etafeni Trust has developed a model of community-built, community-staffed centres that provide health and social services to 723 children and over 5,000 adults in Nyanga, Cape Town. The programme aims to build local capacity, and has been replicated in Vrygrond, Hillbrow and in Limpopo Province. Etafeni has received two Impumelelo awards: one for effective service delivery, one for social entrepreneurship. The success of the model relies on community involvement and partnership with government and a wide range of organisations – academic institutions, civil society,  

Straight talk: Children’s narratives of poverty

Child poverty in South Africa is recognised widely as unacceptably high, and as disproportionately so in relation to adult poverty. While much discussion of child poverty focuses on quantifying its nature and extent, Helen Meintjes of the Children’s Institute at UCT presented narratives from children living in poverty. Ingwavuma, in rural Kwazulu-Natal, is located in one of the country’s poorest districts, and at the epicentre of the HIV epidemic in South Africa. It is the location of the Abaqophi BakwaZi-size Abakhanyayo children’s radio project, an initiative which uses participatory approaches to provide children with skills and support to produce radio programmes that depict their experiences and perspectives. Since the project started in 2005, over 60 children have produced personal ‘radio diaries’, as well as feature programmes. They record their own narratives, soundscapes, and interviews with relevant people. These are broadcast on the local community radio station, as well as made available for download in both audio and audio-visual format on the web. Narratives of hunger, mobility, abuse, history and identity, work and play, illness and death thread throughout the programmes, often with unexpected emphases. This presentation gave voice to children’s perspectives on their circumstances, and provoked reflections about aspects of child poverty that are difficult to measure.

Helen Meintjes – Unsettling the status quo: Children’s challenges to adult perceptions and practices [181]; download from www.childrenradioproject.ci.org.za

6 Stephanie Kilroe – Etafeni Trust: Providing community-run, community-built centres [138]
funders and faith-based organisations.

HIV and AIDS continue to be a major concern throughout South Africa. A case study by Annie Barber for SaveAct explored the role of savings groups in helping poor, rural people affected by HIV/AIDS cope with its multiple impacts, with particular focus on women’s empowerment within and outside of households. SaveAct provides support for 10,000 members in KwaZulu Natal and the Eastern Cape, building on the ‘stokvel’ practice, with strict rules of conduct. The response and growing demand for membership illustrates the need and findings from this research suggest fertile grounds for replication and scale up in other poor rural areas.

Shose Kessi of the University of Cape Town shared the findings of a Photovoice project with young people in Tanzania and South Africa, which illustrated vividly the use of this innovative multimedia technology to produce photographs and stories about community life and social change, which can serve as a direct and powerful form of participatory social action.

Memory work can play a powerful role in promoting individual self-esteem and social cohesion, essential to the goal of poverty eradication. To illustrate this, Julia Wells of Rhodes University shared examples from the 200 Years Project currently underway to wrestle with the troubled past of Grahamstown. Local government acts as the driver, working closely with educational, business and NGO partners to roll out programmes in constructive dialogue. Since the model is knowledge-based, it does not require massive funding in terms of physical resources, but rather investment in expertise and programme development.

In an exciting presentation on the use of media, Soul City and the Seriti Institute presented on Kwanda (meaning ‘to grow’), the world’s first reality TV show on community transformation, which flighted on SABC1 in 2009. The presentation and screenings at the Festival of Ideas illustrated the use of mass media to empower people to tackle poverty and inequality in their own communities, and underlined the potential of public-private-com-

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8 Shose Kessi – Community mobilisation through multi-media technologies: A new paradigm of research and intervention on poverty and inequality [135]

9 Julia Wells – The role of memory work in building social cohesion [291]

10 Innocent Nkata & Gavin Andersson – Mobilising communities to look better, feel better and work better: The story of Kwanda [201]
munity partnerships to address social challenges.

Grandmothers Against Poverty and Aids (GAPA) is a non-profit organisation piloted in Khayelitsha, Cape Town, since 2001. GAPA has developed a replicable model providing peer support for grandmothers, and showing the impact of these elders on improving the fabric of their community through taking ownership of personal and collective development processes.\(^\text{11}\) The presentation shared practical lessons in establishing and growing the model, based on experiences in other parts of the country and Southern Africa.

Heather Sonn presented on Letsema Circle, a programme working in the Eastern Cape to facilitate community-centered interventions in the primary health care system through the ‘walking together’ approach. Letsema Circle has been working in pilot sites in partnership with the Eastern Cape Department of Health and donors. The use of familiar metaphors such as Ilima, Healing Circles, and exploring the meaning of adulthood and citizenship lie at the heart of their work. The approach encourages individuals and communities to confront their lack of self-confidence and self-respect and support

\(^{11}\) Yoliswa Vivienne Budaza, Kathleen Brodrick & Althea Barry – Capacitating for change: A model of practice from Grandmothers Against Poverty and AIDS (GAPA) [39]
Guidelines to Carnegie3 – CONFERENCE REPORT

Poverty and inequality in the media

A daily conference broadsheet, Carnegie3 News, was produced by a team of student interns with guidance from Pippa Green, Sue Segar, and Palesa Morudu (available at www.carnegie3.org.za).

Sue Valentine and Melissa Britz of AllAfrica news agency provided extensive daily coverage of the conference. (Available at http://allafrica.com/view/group/main/main/id/00019110.html)

A panel discussion on Day 2 of the conference, chaired by John Perlman, heard editors and journalists debate the role of the media in realising Vision 2030, and some of the challenges of reporting creatively on issues relating to poverty and inequality.

One another in the healing process. The reaffirmation of the human dignity of all people regardless of poverty and life circumstances coupled with the promotion of the power of collective action has released enormous energy in all the communities. The ‘can do mentality’ is slowly taking root.

Another presentation shared the work of South African Women in Dialogue (SAWID), an independent platform committed to hearing the voice of every woman and to improving the status of women by engaging national government, the private sector, civil society, (including NGOs, community-based organisations, faith-based organisations and donors) in partnership to shape community, provincial and continental agendas.

South Africa has appallingly high levels of sexual abuse, including the abuse of children. Alice Clarfelt and Laura Myers of the Centre for AIDS Development, Research and Evaluation (CADRE) presented findings from a CADRE national study, which found that child sexual abuse in South Africa is perpetuated by poverty, shifting household compositions and poor service provision, intersecting with social drivers that include constructions of masculinity, male sexual entitlement and silencing.

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12 Alice Clarfelt & Laura Myers – The impact of gendered and economic inequalities on child sexual abuse risk [52]
through stigma. The authors made concrete recommendations for community-based interventions, service provision, legislation and policy on child sexual abuse, proposing participatory dialogues as a model of engagement to build collaboration between communities, NGOs and government service providers and improve access to confidential victim-friendly services. Other recommendations include improving the Thuthuzela Care Centre model, and increasing awareness of the provisions of the Children’s Act, including mandatory reporting of child sexual abuse.

The ‘Children Are Precious – CAP’ project is an ecological community-based model, working at the level of individuals, family, school and community to realise children’s rights, build their resilience and reduce the risk of abuse in the Greater Lavender Hill community.\textsuperscript{13} The model was piloted in the area from 2009 to 2012 by RAPCAN (Resources Aimed at the Prevention of Child Abuse and Neglect). Lavender Hill is a predominantly Coloured community, created by forced removals during the apartheid area, and characterised by gang violence today. The findings of the baseline study indicated that families are extremely vulnerable to child abuse and neglect, misconceptions of child abuse and neglect are common, and there is a lack of services for abused and neglected children. CAP aims to: a) Improve responses to child maltreatment; b) Identify and reduce risk factors at family, school and community level; c) Establish and strengthen community-based services for prevention and response. Key interventions include: access to psycho-social support for children demonstrating barriers to learning (tertiary prevention), positive parenting (secondary prevention), child abuse prevention and management at schools as well as communications for social change (primary prevention). The lessons learned highlight the importance of working with communities to facilitate development aspirations and the need for children’s participation.

Much work on the socio-economic situation, aspirations and attitudes of youth in South Africa today has understandably focused on black youth as the largest and most disadvantaged grouping. Ariane De Lannoy of the Children’s Institute shared findings from a study exploring the realities, perceptions and attitudes of Coloured youth in the community of Manenberg on the Cape Flats, where poverty, unemployment and gangsterism continue

\textsuperscript{13} Christina Nomdo – Promoting child well-being and rights: The prevention imperative in social welfare – lessons from practice [204]
to dominate their lives.\textsuperscript{14} Many of these youngsters see themselves as ‘thrown away people’ with no sense of ‘belonging’ or ‘citizenship’. On a positive note, Dr Nasief van der Schyff presented the work of the Collegians Foundation in Mitchells Plain on the Cape Flats, illustrating the impact of using sport to address socio-economic challenges facing young people in impoverished communities. And since its launch in 2000, the Schools Environmental Education Project (SEEP) has introduced marginalised youth from the Cape Flats to nature.\textsuperscript{15} SEEP views socio-ecological spaces as primary sites of recreation, education and sharing, and aims to ‘reclaim’ these spaces as a starting point for inspiring meaningful change. Run by volunteers and ‘township’ teachers, the project arose organically from communities as a response to the lack of prospects and opportunities for local youth, who face so many challenges on a daily basis.

Realising the opportunities presented by the 2010 Fifa World Cup, John Perlman started a project to build soccer fields and improve sporting infrastructure in South African townships and rural communities. The Dreamfields Project is a section-21 company – not for profit – which was launched in October 2007, thanks to immensely generous start-up funding from BHP Billiton and Old Mutual. The project has grown enormously, and now includes distributing Dream Bags (which include soccer balls, boots and kit) in under-resourced township soccer teams and rural areas. Their dream, in partnership with the Department of Education, is to put resources for playing soccer into township and rural schools across South Africa – quickly, efficiently and in a way that reaches the most remote corners of our country.

Social entrepreneurship is a relatively new concept in South Africa and provides a refreshing option in terms of job creation and poverty alleviation. In 2010, UnLtd South Africa began supporting early stage entrepreneurs to develop sustainable, high-impact social enterprises.\textsuperscript{16} Their presentation shared case studies and identified some of the key challenges facing social entrepreneurs, including the lack of an appropriate legislative framework and onerous registration requirements.

\textsuperscript{14} Ariane De Lannoy – “We are thrown away people”: Growing up in the Flats of Manenberg, a case study [67]
\textsuperscript{15} P Hendricks & W Leith – SEEP: Schools Environmental Education Project [111]
\textsuperscript{16} Kathy Watters, Louise Willington, Tom Schutte & Rachel Kruh – Social entrepreneurship – individuals with vision hold unlimited potential to alleviate poverty: The UnLtd South Africa [290]
Youngsters play soccer in kit provided by Dreamfields (pic: courtesy of Dreamfields Project)
Community Development

The need for constructive and effective community development in South Africa is a cornerstone of national development. Jeremy Burnham highlighted how the three core measures of the Sustainable Community Investment Program (SCIP), developed by Dr Norman Reynolds and colleagues, align with the goals of the NDP. In his view, SCIP could revitalise poor communities – urban and rural – now, if properly facilitated.

Capacitating for change requires a particular kind of practitioner, which in turn requires a curriculum that equips service providers, practitioners and citizens with competencies for combating poverty and social exclusion. Hanneke van Bruggen of UCT’s Department of Health and Rehabilitation Sciences at UCT shared lessons learnt from COPORE (competencies for poverty reduction) – a consortium of health, social and educational networks tasked by the European Commission to develop curriculum ‘tuning’ guidelines for application across a range of disciplines.

Poverty and inequality compromise peoples’ capacity to participate in daily community life.

‘Occupation-based community development: Strategies for promoting potential’ drew on three case studies to illustrate the potential positive impact of applying such strategies to build individual and collective agency, and change social structures and institutions.

Despite institutionalisation in the White Paper for Social Welfare of 1997, effective implementation of community development is often challenged by a plethora of policies and programmes and the lack of an integrated community development policy linking efforts across sectors and agencies. Professionalisation of community development requires political will and ongoing support, the motivation and support of current development practitioners, higher education institutions, local communities and civil society organisations. While the first steps have been taken in South Africa towards creating a professional legal framework and professionalization of the practice of community development, the route to full success is wide open.

Poverty is complex, and addressing it cannot

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17 Jeremy Burnham – Creating resilient livelihoods with SCIP [41]
18 Hanneke van Bruggen – Competencies for poverty reduction [275]
19 R Galvaan, L Peters, C Cornelius & L Richards – Occupation-based community development: Strategies for promoting potential [87]
20 S Luka & M Maistry – The institutionalization of community development in democratic South Africa [158]
21 CS Hart – Professionalisation of community development in South Africa: Process, issues and achievements [106]
Bridging the digital divide – using technology for development

Information Communication Technologies (ICTs) can offer innovative, cost-effective ways to share information and resources, and improve access to opportunities and services. As Nondumiso Fengu and Kirsten Krauss of Rhodes University pointed out in their presentation on ‘Introducing and implementing ICT4D training in a developing community in South Africa’, the poor do need economic opportunities, improved nutrition and health care, healthy environments, education, and many other components of sustainable livelihoods. Studies show that one of the most significant reasons why ICTs fail is due to lack of effective and sufficient training. Lasting impact in terms of ICTs requires closer consideration of issues of empowerment and cohesion evidenced in a holistically transformed community or nation. The authors shared ideas on how ICT4D training can be implemented effectively in a community in South Africa, with the aim of addressing development from the root up.

avoid engagement with the soul of society, and the multi-layered wounding over generations. Phia van der Watt of the Centre for Development Support at the University of the Free State explored some of the deep, complex challenges this raises for community development practitioners, drawing on her own long experience and examples from two case studies.  

Rural areas

NGOs working in rural areas face particular challenges. Clarence Magatsha Mayekiso of the Thembalethu Welfare Society flagged some of these challenges, including ‘territorial’ battles with the Department of Social Development and legal issues that impact on the funding and sustainability of Child and Youth Care Centres. He raised concerns about the lack of government leadership in driving implementation of the Expanded Works Programme, particularly the Non-State Sector Work Opportunities Programme, since its launch in 2009.

The cycle of exclusion and poverty is mirrored in the relationship between poverty and disability, rendering those living with disabilities in rural areas particularly vulnerable. Eve Duncan and colleagues from the UCT shared lessons from a participatory development project in the Eastern Cape that offer practical ways to foster community-led action to promote social inclusion and alleviate the impact of poverty.

22 Phia van der Watt – Seductive schemes, dangerous developments – or a journey of discovery and healing [279]

23 Clarence Mayekiso – The shortcomings of the Department of Social Development: Lack of decisive leadership and missed opportunities at Expanded Public Works Programme are central in failure of government poverty alleviation programmes [176]

24 M Duncan, K Sherry, R Watson & M Booi – Rurality, poverty and disability: Strategies for community LED action towards poverty alleviation and social inclusion [74]
Former homeland areas are characterised by high levels of poverty and unemployment. SaveAct is an NGO working in KwaZulu-Natal and the Eastern Cape to improve livelihoods strategies of the rural poor. Unlike mainstream credit-led microfinance, SaveAct recognises that poor people can save, and in fact need to save to manage everyday day needs, big expenses and emergencies. SaveAct promotes a simple, transparent, readily replicable savings and credit model, complemented by financial education and enterprise training. Since 2008, SaveAct has trained 15,000 members in 650 self-selected groups; the combined savings of the groups amounts to about R15 million, with about R10 million available for use as loan capital. ‘Graduated’ groups are self-sustaining, with almost no membership default and dropout. In post-conference feedback, SaveAct’s Anton Krone highlighted the links between workers and indebtedness evident at Marikana, and proposed ongoing dialogue and research to explore appropriate financial services and financial education to promote sustainable livelihoods.

Makgoshi Masipa of the School of Agriculture at University of Venda presented a case study of the work of the Young Women Christian Association (YWCA) in Botlokwa, Limpopo Province. The paper highlighted the need for integrated, holistic approaches for poverty eradication in rural development, including non-formal education to enable participants (particularly women) to improve the quality of life for themselves and their families. The programme offers skills and entrepreneurial development, with a focus on indigenous knowledge systems to improve food security.

The Bulungula Incubator is an NGO operating in the Amathole District of Transkei’s Wild Coast, one of the poorest districts in the country, where 96% of households have an income of less than R1,600 a month, and 78% of the population live below the poverty line (an increase of 10% in the last decade). Through their presentation and short films screened, Bulungula Incubator offered inspiration and practical recommendations for rural development and poverty alleviation in deep rural areas.

25 Anton Krone, Mike de Klerk & Sylvia Storchi – Saveact: Savings and credit groups and small enterprise development. Understanding strategies and opportunities to promote livelihoods strategies and small enterprise development, including in agriculture, through savings groups in a rural setting [143]

26 Makgoshi Masipa – A poverty eradication agenda: Perspectives on YWCA in Botlokwa area [170]

27 Rejane Woodroffe – Lessons learned and practical strategies for poverty alleviation in a deep rural environment [300]
A call to the churches and faith communities

The church can act both as a resource for the development of people in their area, and the improvement of their livelihoods. Secondly it can use its large national presence to mobilise for change focusing on specific single issues at a time – for a year or so. Let us act for the better within our internal sphere of influence, let us also seek to create partnership bridges and mobilise for creative attention to critical issues in our social and economic architecture.... I suggest that we can do more than look outside for solutions. I suggest that within the body of our communities lie many of the solutions. If we take seriously our vantage position in population aspect of the state, then we have a responsibility to help nurture and develop young people for life responsibility and good citizenship. For example, churches and faith communities can make social and economic contributions through investing in young people and in supporting economic productivity in ways such as, for youth:

- Supporting the educational and career development of young people – if this were the case we would mitigate much of the problems we have with education in the Eastern Cape and Limpopo;
- Providing a safe and structured environment for self-awareness and personal growth towards a healthy confidence and positive life ambition towards life possibilities;
- Inculcating a self-drive mind-set to break through the social and intellectual barriers inhibiting the vulnerable youth from poor communities, especially girls;
- Inculcating a positive and inquisitive mind-set for knowledge and capacity for critical thinking and problem solving in social and economic entrepreneurship;
- Nurturing and strengthening young people's ownership of positive social values, as well as the appreciation of the asset value of their social heritage, and deepening their cultural roots for identity and sense of ‘being’ as a foundation to build upon; and
- Encouraging the development of good citizenship for the village and district; province and country; the sub-region, the continent of Africa and the world........

I am suggesting here, that the faith communities, the Christian churches in particular, should consider something that will draw the whole of society into debate that focuses on the critical issues facing the country, and crafting practical solutions that recognise that the analysis of current reality has its valuable place if it informs effective solutions. The National Planning Commission has been engaged with that kind of analysis and the crafting of solutions. Now the challenge is how to take the identified problems into manageable bite sizes, micro-analyse them, apply the lenses of positive values in judging them and come up with action steps that every local community should pick up on for a changed reality.

Malusi Mpumlwana, Bishop of Maropeng in the Ethiopian Episcopal Church. (This extract is taken from his keynote address delivered at the Impumelelo Awards Ceremony, held on Thursday 6 September 2013, at the Baxter Theatre, Cape Town.)
Churches/faith-based organisations

Churches are well positioned to play a key role in addressing poverty and inequality by transforming the social landscape at a grassroots level. In South Africa historically churches played a key role in provision of health care and education, until divested of these functions by the apartheid state. David Adams presented a case study of the Jubilee Community Church in Cape Town, and how it endeavours to fulfil its mission of caring for others through community activities.  

In her presentation she highlighted that while the church has not always been a positive agent of change, through renewal of theology and praxis the Church may continue to contribute to social transformation and mobilisation of faith-based communities to address poverty and inequality.

In his presentation, Robert Vosloo of the Faculty of Theology at Stellenbosch University explored the response of the Dutch Reformed Church to the ‘poor white’ problem, which formed the focus of the first Carnegie Commission in the 1930s. The paper drew on archival evidence to illustrate both strengths and weaknesses in the Church’s response historically and suggested that there are lessons to be learned in attempts to address poverty today.

Donors/grant-making

The NDP makes scant mention of the non-profit sector, and its potential to contribute to job creation, skills development, and key service provision. Kevin Kelly of the Centre for AIDS Development Research and Evaluation (CADRE) at Rhodes University presented research conducted into the scope and scale of non-profit service organisations (NPSOs), highlighting official ambivalence about the role of extra-governmental partners in fulfilling significant government mandates. Brief case studies were used to illustrate how their contribution could be optimised and targeted to the needs of the developmental state, and a set of research and evaluation themes critical to the sector’s future was put forward.

28 David Adams – The role of the church in combating poverty and inequality in South Africa: A case study from Cape Town [1]
29 Nadine Bowers Du Toit – The Church as an agent of change: Reflections on the role of the Church in Carnegie 1, II and now III? [34]
31 Kevin Kelly – Prospects for the non-profit services sector in the developmental state [131]
While the state has expedited infrastructural development and financial empowerment since 1994, less success has been achieved in promoting social cohesion. This harder part of transformation covers factors often regarded as ‘soft’ – the fragile social fabric, perceptions of opportunity, community fragmentation and a poor sense of identity and belonging. Addressing these factors requires sophisticated interaction between sense of identity and belonging. Addressing these opportunity, community fragmentation and a poor transformation covers factors often regarded as promoting social cohesion. This harder part of since 1994, less success has been achieved in cultural development and financial empowerment.

innovation and inclusion. 32

education, connection to opportunity, leadership for
tion itself as a catalyst for change, through several
case studies to outline key strategies they have used to address some of these challenges, and shared key lessons about how grant-making can play a role in breaking the poverty cycle. 33 Among the key lessons learnt are that injecting funding resources into poverty stricken and marginalised communities can also cause problems – tensions and strife within organisations, suspicion and resentment in communities and, the ever-present problem of financial ‘mismangement’ benefitting individuals, in addition to issues around impact.

32 David Harrison – Tackling the hard ‘soft’ aspects of transformation: The role of grant-making foundations in South Africa [104]

33 Merle Favis – Grant making for poverty reduction [81]
Afterword

Some idea of what the Conference on which this report is focused meant to participants is captured in this assessment, written shortly afterwards, by someone who works closely with many NGOs in both rural and urban areas of the country. It is a fitting conclusion to this Guide.

It’s not often that we have the time to stop; time to stop and explore a little into where we’re going collectively. On the best side, South Africa has continued to surprise even the biggest sceptics with its ability to maintain relative stability and economic calm through stormy financial periods and a larger-than-life World Cup. Yet poverty and inequality, coldly economic terms, continue to threaten every aspect of the social and economic well-being of the vast majority of South Africans. The reality is as stark as the Gini coefficient. Although so much is already being done, the rift between the top 20% and the bottom 80% of the population isn’t getting any smaller.

The Carnegie process is a metaphor for the power of South Africans to engender significant change. Our history is punctuated with two previous Carnegie Conferences. The first Carnegie Inquiry took place around the time of the Great Depression. The second took place in the 1980s, and both conferences sought unity between theory and policy which might pave the way to an answer. What has changed so dramatically is the focus of these conferences as Carnegie3 marks the first which is inclusive and places equality at its core. Now, so many years after the establishment of our iconic and proudly South African constitutional democracy, the spotlight, at last, falls on poverty and inequality. We have come a very long way. And the realised aspects of our potential really are evidence of the potential contained in what lies ahead.

In their droves, the sociologists, the activists, the teachers, lecturers, the academic purists, the economists, the students and a beautiful long list of movers and shakers arrived at the Baxter Theatre to put theory and practice in the ring for a fight for the truth. It was truly awe inspiring to see so many fascinating minds hard at work over the problem, working hard to improve the lives of all, working hard to try to understand how this unobtainable goal keeps eluding us. This legged abundance of information was united toward a collective effort, for one week, which I hope will mark important paradigm shifts in how South Africans address questions of poverty and inequality. Carnegie has united forces before to turn theory into action and
the unity between all present, government, university and mense was tangible.

The presentations on Education ranged from topics around the significance of multilingualism in the early years, to extensive social participation model schools – which work, and the importance of pleasures as simple as reading and playing sport in creating happy people; people happy enough to high-five Maslow and become their dreams.

The presentation of papers on Social Cohesion explored aspects of the prevalence of violence which is perpetuating a helpless situation, with a potential poverty trap; while on the lighter side, presented the Citizen’s Movement for Radical Social Change, which hopes to unite and empower citizens to act collectively for the common good. Subject2Citizen wrist bands were donned by many after this inspiring talk.

The unemployment sessions were a little more data heavy, but were nonetheless filled with surprising potential future paths for employment creation. It is always saddening to face the figures, to have the data prove that increasing exports might do more bad than good in terms of employment creation, that causality is indefinable between private sector growth and employment growth. However, a case study by PLAAS of a man with nothing, now farming some 1,400 head of cattle plants the seed for the vision of a vibrant, self-creating South African economy. Not formal, nor informal, but simply the product of people who are sufficiently empowered to create their own livelihoods.

Having conducted research into exchange rate controls for export promotion once myself, I was misguided into the room where an econometric study around Voluntary Export Restrictions on Chinese textiles showed that the result has only been a distinct disadvantage for ‘the poor’.

The poor. This phrase was something which three of the groups I attended argued should be dropped from our vocabularies. The acknowledgement of the impossibility of finding a ‘right’ answer, of being able to necessarily understand or categorize ‘the problem’ from the bird’s eye view and then to apply the answer on the ground was also a common theme. Every article and case study showed a different community, a different place, a different time. With such radically different circumstances for every South African, the challenge before us is indeed great. Another issue raised more than once is the difficulty of the conflict of interests between capitalism and the strive for equality. Lower the pay of the rich, up the pay of the poor was the anti-capitalist banner; while the other team claimed that
‘no minimum wage’ was the answer. Whichever theory wins, research and policy don’t connect wirelessly to the attainment of equality. Themes around the ‘appreciative approach’, which uses indigenous knowledge and asks questions, rather than arriving with a barrage of answers for problems so endemic we couldn’t begin to understand, were promoted. In one presentation of the success of the approach, there was emphasis placed on changing paradigms in the smallest way, by using phrases which gravitate toward positive outcomes. The example is still loud and clear in my mind; use the words “children need three square meals a day” in place of “children are hungry”. The hard economics and the softer sides all played their part in these exquisite exploratory discourses.

A final aspect which featured during this conference is facing the possibility that what South Africa really needs is a coordination exercise. Entry level game theory paints a picture of the potential win-or-lose aspects of coordinating, or failing to do so and the gains are indeed great; if we can get it right. There is no question that unity is something we should apply, especially as it is one of the primary goals we all hope to achieve.

Through it all, everyone present was able to develop a richer and deeper understanding of South African development; her people; her problems and her incredible capacity to adapt. It was a great week, of listening, talking, sharing stories and so, was a really powerful expression of the beautiful beaded South African tapestry.

They say the only thing inevitable is change. And to this, I add difference; change’s stationary counterpart. Then what we have is a conception of uniqueness; of something which can never just be stuck shut with a generic band aid. The work that individuals are doing is astounding and the understanding of the true aspects of what it means to be a South African is deepening daily. The conference was a tour de force; I was moved, inspired and most of all, I learnt. It is sad to realise, that after all this time, we haven’t even begun. The reality is truly sobering. But at the same time, this gathering of energies toward a unified effort is indeed, a celebration. If we can find a way to translate more effectively what we all know so well, into actual practice, it is then that the future will be bright.

Angela Biden
### ACRONYMS

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<thead>
<tr>
<th>Abbreviation</th>
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<tr>
<td>ABCD</td>
<td>Asset Based Community Development</td>
</tr>
<tr>
<td>AGRA</td>
<td>Alliance for a Green Revolution in Africa</td>
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<td>ALMP</td>
<td>Active Labour Market Policy</td>
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<td>CAMP</td>
<td>Community Asset Mapping Technique</td>
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<td>CAPS</td>
<td>Curriculum Assessment and Policy Statements</td>
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<td>CCMA</td>
<td>Commission for Conciliation, Mediation, and Arbitration</td>
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<td>CI</td>
<td>Children's Institute</td>
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<td>CPUT</td>
<td>Cape Peninsula University of Technology</td>
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<td>CSG</td>
<td>Child Support Grant</td>
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<tr>
<td>CSTL</td>
<td>Care and Support for Teaching and Learning</td>
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<td>DBET</td>
<td>Department of Basic Education and Training</td>
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<td>DPRU</td>
<td>Development Policy Research Unit</td>
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<td>DRC</td>
<td>Dutch Reformed Church</td>
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<td>EDP</td>
<td>Economic Development Partnership</td>
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<td>EE</td>
<td>Equal Education</td>
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<tr>
<td>ELRU</td>
<td>Early Learning Resource Unit</td>
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<td>FET</td>
<td>Further Education and Training</td>
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<tr>
<td>HSRC</td>
<td>Human Sciences Research Council</td>
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<td>ICT</td>
<td>Information and Communication Technology</td>
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<td>NDP</td>
<td>National Development Plan</td>
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<tr>
<td>LED</td>
<td>Local Economic Development</td>
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<td>NCS</td>
<td>National Curriculum Statements</td>
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<tr>
<td>NDP</td>
<td>National Development Plan</td>
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<td>NGO</td>
<td>Non Governmental Organisation</td>
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<td>NIDS</td>
<td>National Income Dynamic Survey</td>
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<td>NPC</td>
<td>National Planning Commission</td>
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<td>NTA</td>
<td>National Transfer Accounts</td>
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<td>NWGA</td>
<td>National Wool Growers Association</td>
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<tr>
<td>OECD</td>
<td>Organisation for Economic Cooperation and Development</td>
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<tr>
<td>PDL</td>
<td>Poverty Datum Line</td>
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<tr>
<td>PLAAS</td>
<td>Institute for Poverty, Land and Agrarian Studies</td>
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<tr>
<td>PMDP</td>
<td>Principals Management Development Programme</td>
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<td>PSPPD</td>
<td>Programme for Support to Pro-Poor Policy Development</td>
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<tr>
<td>RDP</td>
<td>Reconstruction and Development Programme</td>
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<tr>
<td>SALDRU</td>
<td>Southern Africa Labour and Development Research Unit</td>
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<tr>
<td>SAWID</td>
<td>South African Women in Dialogue</td>
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<tr>
<td>SETMU</td>
<td>Student Equity and Talent Management Unit</td>
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<tr>
<td>SMMEs</td>
<td>Small, medium and micro enterprises</td>
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<tr>
<td>STIAS</td>
<td>Stellenbosch Institute for Advanced Study</td>
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<tr>
<td>TB</td>
<td>Tuberculosis</td>
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<td>TLS</td>
<td>Training Layoff Scheme</td>
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<td>TRIP</td>
<td>The Re-Integration Programme</td>
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<tr>
<td>TVET</td>
<td>Technical and Vocational Education and Training</td>
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<tr>
<td>UCT</td>
<td>University of Cape Town</td>
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<tr>
<td>UFS</td>
<td>University of the Free State</td>
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<tr>
<td>UKZN</td>
<td>University of KwaZulu-Natal</td>
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<tr>
<td>UNISA</td>
<td>University of South Africa</td>
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<tr>
<td>UWC</td>
<td>University of the Western Cape</td>
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<tr>
<td>VPUU</td>
<td>Violence Prevention through Urban Upgrading Programme</td>
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<td>University of the Witwatersrand</td>
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Behind the scenes with the ‘Festival of Ideas’ team (pic: conference photographer, Liam Cornell)
In September 2012, over 500 people gathered at the University of Cape Town for a five-day conference entitled, ‘Towards Carnegie3: Strategies to Overcome Poverty & Inequality’. The conference was the launch of the Carnegie3 Inquiry, at the request of the National Planning Commission, bringing together academics, government officials and members of civil society organisations to share ideas and models for effective action to overcome poverty and inequality in keeping with the goals spelt out in the National Development Plan. This Guide provides an overview of some of the key themes addressed in over 300 presentations, with particular focus on identifying gaps and areas in need of further research and sharing effective models to inspire change.