



Social policy in South Africa: Navigating the route to social development

Sophie Plagerson^{a,*}, Leila Patel^a, Tessa Hochfeld^a, Marianne S. Ulriksen^{a,b}

^a Centre for Social Development in Africa, University of Johannesburg, South Africa

^b Danish Centre for Welfare Studies, University of Southern Denmark, Denmark



ARTICLE INFO

Article history:

Accepted 25 August 2018

Keywords:

Social policy
South Africa
Social protection
Social compacts
Gender
Welfare regimes

ABSTRACT

This paper reflects on the trajectory of social policy in South Africa (1994–2017) and on which policy levers present opportunities for cross-country policy transfer, in order to address current social development challenges. The current direction of social policy is described as the result of a compromise between two distinct alternative paradigms whereby the statist transformative and market-oriented residual paradigms are held in tension. On the one hand, a transformative policy perspective draws on human rights and views redistribution as a necessary premise for and means of economic growth. On the other hand in the residual framework, redistribution is envisaged as a secondary function that is dependent on economic growth. Several instances are outlined in which this tension is evident, together with the implications for social policy across the policy cycle: in legislation; in social compact formation; in the selection of social programmes and in their implementation; in gender-mainstreaming and in the engagement of the private sector in social policy.

Overall we highlight areas of hybrid policy overlap between these bifurcated ideological, political and institutional frameworks, for example around social transfers and corporate social investment. We also describe instances of conflicting and at times unexpected outcomes, such as the National Health Insurance.

Several factors are concluded to be of relevance to the Global South more generally: the importance of constitutionally-legislated rights as a basis for advancing socio-economic claims; the emergence of new social compacts in contexts where there are significant levels of informal employment and unemployment and lastly, the influence of fiscal and institutional capability factors in shaping the direction of social policy and its implementation.

© 2018 Elsevier Ltd. All rights reserved.

1. Introduction

Social policy and programme innovations in developing countries have attracted widespread international attention. The emergence, nature and effectiveness of recent social policy pathways are therefore of interest, to understand whether these represent substantive approaches to the social development challenges faced in low and middle income contexts. Understanding the linkages between social policy and development outcomes is a theme of current relevance in South Africa, since longitudinal studies have shown that poverty rates have recently begun rising again (to 55% in 2015), after significant gains over the past two decades (StatsSA, 2017a). This paper draws on a survey of existing literature in order to chart the trajectory of social policy formulation (and to some degree implementation) in the 1994–2017 period.

By examining to what extent South African social policy is leaning in new directions, in policy and in practice, this paper contributes to cross-national policy thinking and the compilation of evidence to inform global debates.

A transformative paradigm was established by the ruling party in South Africa's fledgling democracy in 1994 which anticipated substantial reengineering of the economic and social sector, through high levels of redistribution towards a deracialised, equitable and inclusive society, with poverty and inequality reduction as central goals. This paper reflects on the trajectory of this vision and how it has played out in practice within the broader political and social environment.

Two key arguments of cross-national relevance frame this paper. The first is that, while Esping-Andersen's welfare regime typology (Esping-Andersen, 1990) carried an assumption that each national regime type was underpinned by a dominant ideology, in South Africa in reality social policy is being carved out in contexts defined by multiple concurrent ideologies. Arguably, in the rapidly changing global political and economic climate, the repercussions

* Corresponding author.

E-mail addresses: splagerson@uj.ac.za (S. Plagerson), lpatel@uj.ac.za (L. Patel), tessah@uj.ac.za (T. Hochfeld), mu@sam.sdu.dk (M.S. Ulriksen).

of economic crises and high levels of inequality, such policy pluralism is likely to increase and has become a common backdrop against which social policies need to be designed, implemented and evaluated in many countries. As Murray Li (2016) notes, “Contradictions between the demands of capital and the need for legitimation make welfare states dynamic sites of contestation in the global North and South alike” (p. 1254).

The second key argument is that the contexts in which the social compacts between the state, labour and capital were forged in the cases of several established European welfare regimes, are fundamentally different from those of many low and middle-income countries. Assumptions regarding the availability of work and the correspondent absorption of able-bodied workers no longer hold. In South Africa, access to jobs is stratified by geography, race, gender and age, with large sections of the population at the periphery or excluded from labour markets. This highlights the need for new and context-specific approaches to distribution: “The need for assistance, then, is not about being “between jobs” or correcting for dips in the business cycle; it is part of a world in which many, or even most, people, for the foreseeable future, will lack formal sector employment” (Ferguson, 2009).

The South African pluralistic social policy landscape displays features characteristic of both a transformative and a residual framework. A transformative framework is built on norms of solidarity, and provides services and transfers based on rights, envisages state intervention as a channel for the reversal of structural inequalities and for redistribution of income and opportunities, and considers social and economic policies as complementary. The residual framework on the other hand has a minimal form of social policy; it is based on norms of individual responsibility for the care of dependents, education, and the maintenance of health, gives provisions based on narrow forms of reciprocity, considers social policy as subordinate to economic policies, and regards the market as the primary welfare provider, with the state taking the final responsibility as a provider of last resort (often delegated or abrogated to civil society institutions).

In South Africa, robust and vocal advocates and adversaries of both ideological paradigms are present. A firmly redistributive paradigm was established in 1994 which envisioned a substantial role for the state in many areas of policy, including fiscal, industrial, economic, as well as social. Though the broad consensus has weakened, this stance has consistently been promoted by significant sections of the ruling party (African National Congress) and its political allies in the labour movement and the Communist Party of South Africa which enjoyed strong electoral support over the past two decades. Conversely at the other extreme, a belief that the pursuit of economic growth is the most effective driver of both social and economic development, has also been an influential stance taken to different degrees by stakeholders including senior government officials, foreign and domestic businesses and investors, international financial institutions and large sections of the media. Economic policies of the late 1990s were strongly influenced by the conventions of international financial institutions, and these ideas still hold a dominant position in economic discussions in South Africa today (Seekings & Nattrass, 2015). New party leadership since 2009 advocated more radical transformation but has been embroiled in allegations of corruption which has eroded its potential to achieve transformative change. Political divisions in the ruling party paved the way for leadership contestation at the end of 2017. The new leadership promises to reassert the country's constitutional ideals as well as to court economic growth and private sector investment. It is still uncertain whether this signals a more transformative direction in future.

The variety of policies that occur between the extreme poles of transformative and residual policy frameworks can have complementary, conflicting and variable elements (Ulriksen & Plagerson,

2017). In South Africa, we illustrate how this unresolved tension is visible across the spectrum of the policy process and relationships: in the role of legislation, the courts and civil society (Section 2); in social compact formation (Section 3); in the selection of social programmes (Section 4) and in their implementation (Section 5); in gender-mainstreaming (Section 6) and in the engagement of the private sector in social policy (Section 7). We conclude (Section 8) that the substantive policy changes in South Africa over time do suggest the emergence of a social policy core.

Yet the analysis shows how social policy is not static and we acknowledge the role of broader political and economic trends in contributing to the direction of social policy, such as dwindling state resources, job losses and the formulation of demands by the marginalized. Among these factors, we specifically discuss how institutional and capability challenges of the state interact with the ongoing contestations around the politics of distribution. In the past decade in South Africa, the central set of social policy programmes, forged at the cross-section between pluralistic frameworks, has been increasingly undermined, destabilized and weakened through a process of systemic political corruption in which private interests have significantly influenced the state's decision-making processes to their own advantage (Bhorat et al., 2017). This unforeseen potential for ‘state capture’, even within a vibrant democracy, cannot be ignored, and must form part of discussions around the future directions of social policy and social development in the global South.

2. Legislation, the courts and civil society: A strong foundation

The most distinct expression of the transformative paradigm is in the Constitution of the Republic of South Africa (1996), itself an embodiment of struggles to chart a way forward for the country after the negotiated settlement and creation of a democratic society. We argue in this section firstly that the Constitution has ensured broad continuity in the overall transformative and redistributive direction of social policy. This has occurred despite ongoing contestation reflected in subsequent policy documents over the optimal relationship between social and economic policy. Second, the Constitution has provided a rallying point for civil society movements and a compass for the judiciary to keep the country orientated towards a vision of integrated social policy and the centrality of human wellbeing.

Together with the Bill of Rights and South Africa's commitments to international human rights, the Constitution makes provision for the right to housing, health care, food, water, shelter and social security and education (R.S.A., 1996). The Constitution requires the state to progressively achieve the full realisation of these rights within its available resources¹. The Constitution overturned racially discriminatory apartheid policies, affirmed the interconnectedness and indivisibility of social and economic rights, institutionalised the principle of concentrating resources on the most disadvantaged sectors of the population and laid the foundation for the restructuring of the welfare system according to principles of justice and equity (Patel, 2015; Woolard, Hartgen, & Klasen, 2011). This vision exceeded alternative views of social and economic policy as a zero-sum formula. Instead, it envisaged multiplicative effects for those who have been historically disadvantaged and excluded, and the realisation of reciprocal benefits for all citizens through coordinated planning.

The Constitution embraces a liberal-egalitarian vision for society (Klare, 1998). The firm legislative basis established in the Constitution as the supreme law of the land has restrained excessive

¹ In the case of children (Section 28), the state's obligation to meet their needs and rights these qualifications do not apply.

Download English Version:

<https://daneshyari.com/en/article/8960887>

Download Persian Version:

<https://daneshyari.com/article/8960887>

[Daneshyari.com](https://daneshyari.com)