

Consequences of Social Protection on Intergenerational Relationships in South Africa

To cite:

Moore E and Seekings J (2019) Consequences of Social Protection on Intergenerational Relationships in South Africa. *Critical Social Policy*. Vol 39(4) 513-524

Abstract

Categorically-targeted social assistance programmes have considerable potential to reduce poverty and buttress the dignity of disadvantaged groups of people, but they can also generate tensions over financial support and care within households and families. This is especially likely in contexts in the global South where landlessness and unemployment combine with historically-rooted norms and practices to underpin complex patterns of interdependency. The articles in this issue examine the case of South Africa, where an unusually broad and generous system of social assistance reduces poverty and enhances dignity, but also reshapes social dynamics of support, care and dependency within households and families, generating new tensions.

Key words: social protection; social assistance; South Africa; intergenerational relationships; social grants; kinship; Africa.

Introduction

South Africa's system of social protection has been widely lauded for its impressive effects in reducing poverty (e.g. Hanlon *et al.*, 2010; Garcia and Moore, 2012; World Bank, 2014; Ferguson, 2015). Public provision is based on a set of unconditional, tax-financed cash transfers (i.e. social assistance), including especially pensions for the elderly and disabled and modest 'child support grants' for poor carers of children and adolescents. The system predated and survived apartheid and has been expanded since the transition to democracy in 1994. Pensions and grants are means-tested, but this serves to exclude the rich rather than target benefits on only the very poor. More than seventeen million grants are paid monthly, i.e. for one in three adults or children in the country, to more than 50 percent of the country's households, at a cost of about 3.5 percent of GDP (Author, 2015: 142-7). Because grants are typically shared within households (and even kin elsewhere), poverty is greatly reduced. In

2015, cash transfers reduced the poverty headcount rate by 8 percent and the poverty gap by 30 percent, with the biggest effects in the poorest rural areas. Inequality is also reduced considerably, with the Gini coefficient for income distribution falling by at least 10 percentage points (World Bank, 2018: 72-3).

The cash transfer programmes benefit or empower many of the least powerful members of society: poor children (and their caregivers), including especially single mothers, the elderly and the disabled. A long series of studies attest to the educational and nutritional benefits for children (Heinrich et al., 2012) and the enhanced dignity of the elderly and young mothers (Sagner and Mtati, 1999; Wright et al., 2015; Zembe-Mkabile et al., 2015).

Poverty persists despite this safety net because there are large holes in the net. The child support grant pays modest benefits. More importantly, there is very little provision for unemployed men or women of working-age. This is in a society where the unemployment rate hovers above 35 percent (by the most appropriate definition) – the result of the failure of apartheid and post-apartheid governments to tackle the deepening employment crisis (Author, 2015). Workfare programmes and unemployment insurance support very few unemployed people.

Because grants are paid directly to specific categories of people deemed deserving and not to all poor adults, they generate tensions, including along gender and generational lines. The main argument of the special issue is that the conflict arises from the fact that, in the context of poverty and inequality, some people get grants and others do not. The argument is premised on the fact that there is social inequality both within and across households. In the context of high unemployment, the people who don't get social grants are forced into dependence on kin, which can create conflict. And this is premised on the fact that they don't have resources of their own.

Furthermore, we argue that even if social grants were universal, there may still be tension because there are normative disputes within and between families about who is and who is not deserving of public grants or support from kin. There has been significant anxiety over whether the Child Support Grant (CSG) and Disability Grant (DG) have been paid to deserving claimants as opposed to, for example, mothers who spend their CSG on themselves (Blaike, 2014; Wright et al. 2015) or people who are not genuinely disabled (Kelly, 2012). Several studies have suggested that many female CSG beneficiaries are subjected to heavy surveillance

from family members and the wider community (Blake, 2015; Plagerson and Hochfeld, 2011; Wright et al. 2015). There is also evidence which suggests that the payment of grants to young women prompted criticisms from men (especially older men) and also some older women, who saw this as undermining traditional (i.e. patriarchal) authority (Dubbed, 2013; Hickel, 2015; Mosoetsa, 2011). Other research evidence points to the rejection of cash transfers by poor young men (Dawson and Fouksman, 2016).

The articles in this issue build on these observations, exploring how the very success of social grants in terms of lifting many (but not all) poor people out of extreme poverty has transformed intergenerational relationships. The combination of categorically targeted social grants with often conservative familial norms transforms families and generates new patterns of conflict within them. The dominant literature from the global North has underestimated the extent to which ‘private’ conflicts can arise from even poverty-reducing and dignity-enhancing public provision in the global South.

South Africa’s social protection system entails primarily tax-financed social assistance, along with generally low-quality public health care. The minority of adults in formal employment can enrol in what we have called ‘semi-social insurance’, but this does not benefit the poor majority (Author, 2002). Four articles in this issue focus on the major social assistance programmes: the old age grant or pension (paying the equivalent of about US\$135 per month to more than 3 million people over the age of 60), the disability grant (paying the same to more than 1 million adults) and the child support grant (paying a much more modest US\$30 per month for more than 12 million children until the age of 18). One article considers the specific case of the Road Accident Fund, which operates like a universal social assistance scheme, protecting citizens against the risks of motor-related accidents. The final article examines popular norms around who is considered deserving of both public and private support.

South Africa is an especially useful site for studying the social consequences of social protection because public provision is unusually extensive (and generous relative to most other social assistance programmes across the global South), programmes are unconditional (in contrast to most programmes in Latin America) and social and economic change has resulted in major challenges. Much of Africa is being transformed by rising landlessness and unemployment, urbanisation, changing household structures and kinship relations, and the rise of individualist consumerism. These affect differently men and women, older and younger

generations, and the poor and non-poor. Across Africa, international organisations have been advocating strongly the expansion of targeted social assistance programmes, often along South African lines. Just as the South African case points to the likely benefits of expanding social assistance elsewhere in Africa, it also points to the unintended consequences in terms of changing relationships within households and between kin.

The themed issue reflects knowledge production from the global South, although not by intellectuals from the same social backgrounds as most grant-receiving households. The public social protection agenda across most of Africa has been framed by agencies from the global North (Hickey et al. 2009) and rooted in an ideology of individual rights derived from the particular history and cultures of the global North. Neither the public agenda nor the scholarly literature has paid much attention to how people in societies across the global South experience and perceive social grants and protection. This is especially true of Africa. Some recent South African studies have begun to focus on the experiences and perceptions of the people – especially young women – who receive state grants (Patel 2015; Wright et al. 2015). It is in this vein that the themed issue tries to respect and explain what people in one country – South Africa – say about the social consequences of social grants. The authors did not look for evidence to corroborate prior intuitions, but rather sought to make sense of discourses and behaviours that are very quickly apparent to researchers, i.e. issues which arose inductively. The motivation for the research was not to denigrate grants but rather to respect what people tell researchers.

Doing research in postcolonial contexts, feminists and researchers who carry a legacy of privilege must reflect on the power dynamics of the research process to avoid misrepresenting, exploiting and endangering the participants (Vanner, 2015) In the themed issue, the authors outline how their findings are rooted in dialogue with participants. Driven by transformative objectives, we argue that social protection reformers need to engage with diverse norms and values, and advance social justice – including gender justice - holistically rather than through a narrow focus on specific poverty reduction programmes.

The South African context

Three aspects of the South African context are particularly important for understanding the ways in which the expansion of public provision has reshaped relationships within households and between kin.

First, economic dependency is widespread in South Africa as a result of the persistence of unemployment and poverty. Poverty – which remains concentrated among African people – is rooted in the history of dispossession of land and destruction of the indigenous peasantry, and restricted education and economic opportunities under apartheid. From the 1970s, unemployment rates rose (Author, 2005). The transition to democracy did not lead to any significant reduction in unemployment or poverty (Author, 2015). Most South Africans remain dependent on either kin or the state (Ferguson, 2015). Employment rates are much lower among young men and women, rise among the middle-aged, and fall again among older men and women. The less skilled are always much more vulnerable to unemployment than the skilled. Employment rates remain higher among men than among women, although it is also true that economic change has expanded the opportunities open to women, especially in white-collar employment.

Secondly, African cultures have historically been communitarian and solidaristic. ‘In traditional African society, the individual was not autonomous or possessed of rights above and prior to society’, writes Nhlapo (1989: 4); a person’s ‘place in society was fixed by a defined role or status in a greater whole, be it family, clan, tribe or community’; duties were emphasised rather than rights, and mutual obligations over individual advancement. Despite encroaching individualism, interdependence and mutual obligation remain fundamental to the norms of kinship in Southern Africa. This is intertwined with the cultural ethos of ‘ubuntu’ (in Nguni languages) or ‘botho’ (in Setswana), which emphasises the importance of ensuring the well-being of the collective over the individual.

Thirdly, households and kin relations exhibit striking change as well as continuity. The most significant change is the decline of the paternal breadwinner and the rise of female-headed households. Almost as many South African households are headed by women as by men, reflecting women’s longer life expectancy, increased economic independence (including access to employment) and a decline in marriage (Posel and Rogan, 2009). Whereas labour migration historically involved mostly men, by the 2010s women were as likely to migrate as men (Schiell and Leibbrandt, 2015). By 2011, almost two out of three adult women had never

married or lived together with a partner (Mhongo and Budlender, 2013). Only one in three children lives with his or her father (Hosegood and Madhavan, 2012). Support for children by paternal kin has also declined (Author, 2010). At the same time, co-resident households remain likely to comprise ‘extended’ families involving three generations (or grandparents and grandchildren only in ‘skip generation’ households) and/or various non-nuclear kin. Most elderly people live with younger kin. Households also tend to be both fluid and porous, meaning that their composition changes over time as a variety of individuals move in and out of the residential unit (Spiegel *et al.*, 1996; Author, 2008). Households are often porous also in the senses that resources – including both money and unpaid labour – flow between individuals residing in different households. Many individuals provide or receive practical, personal or financial care to or from kin and even non-kin residing elsewhere.

The expansion of social citizenship and rights through the South African welfare state has not taken into account the enduring prevalence of interdependence. With the partial exception of child grants, the social grants confer rights on selected individuals without any acknowledgement of their social responsibilities or obligations to other kin. Even the child grants provide support to caregivers on behalf of children without any allowance for the needs of the caregiver herself (or the claims of other kin) (Goldblatt, 2005: 242). Paying grants to selected individuals potentially subverts norms around both the social responsibilities associated with interdependency and the value of work (including care work), with many women as well as men, of diverse ages, articulating concern over the payment of ‘something for nothing’. Moreover, in the absence of direct income support for all poor people (through, for example, a basic income grant), many poor people inevitably claim support from kin (or non-kin) who do receive grants directly. Through both providing grants to some individuals within households and families and denying them to others, the state has recast relations of dependency within households and families as much as between its citizens and the state itself.

The expansion of public provision has had gendered and generational consequences, as several previous studies have suggested (Dubbeld, 2013; Goldblatt, 2005; Mosoetsa, 2011; Wright *et al.* 2015). Most grants are paid to women. Almost all child grants, two out of three old-age pensions and one half of disability grants are paid to women (REFERENCE). In total, we estimate, more than 14 million grants are paid to women (mostly on behalf of children) and less than 3 million to men. Because many women receive more than one grant, we estimate that about four times as many women as men receive any grant. █ At the same time, a high

proportion of the benefits paid out are paid to the elderly, because the value of the old-age grant or pensions is substantially higher than the value of the child support grant. Social grants thus put resources in the hands of women and the elderly. This is effective in terms of poverty-reduction, because women are more vulnerable to poverty than men (Posel, 2014), the elderly cannot work and elderly women in particular are most likely to use their old age grant to support their children and grandchildren (Schatz, 2007, Schatz and Ogunmefun, 2007, Mosoetsa, 2011, Sidloyi, 2016). But it also provokes tensions and conflicts within households and families (Dubbeld, 2013; Goldblatt, 2005; Mosoetsa, 2011).

Tensions arise not only around the redistribution of social grants to dependent kin but also around the distribution of care. The articles in this issue draw on a critical theory of care in analysing practices of care as forms of power within households, families and society. Through links to the economy and social policy, care has been coupled with welfare, but this issue attempts to separate issues of welfare and care by examining not only the strained social conditions where care is given and received but also an analysis of how welfare provision is experienced in the local context. Most importantly we focus on the interrelationships between gender, race, class and care. Moving beyond the well-documented ways in which women have greater responsibility for care work, including care for the ill, elderly and children (Hatch and Posel, 2018), we focus on the ways in which women are related to the children for whom they provide physical care and the extent to which women are the sole providers of care, both financial and practical.

A context-sensitive understanding of care requires that we draw on local everyday notions of care (sometimes labelled as 'ubuntu') to unpack the ways in which communal bonds and a relational notion of the self is foregrounded and understood. We follow Gouws and van Zyl (2014) who argue that a southern lens for a feminist ethic of care analysis allows for contextualising relationships of interdependence and needs, while simultaneously highlighting the gendered dimensions of care. It also provides a perspective for analysing South African state policies framed in the language of both rights and ubuntu. We uncover how rights talk often conceals features of the care situation, namely the structural conditions that produce the dependency of poor people on others or the state in the first place. In terms of care this issue is interested in what actually takes place, who provides care, for whom and of what kind but it also looks at the values and norms concerning the role of the family and the state in meeting caring responsibilities.

A challenge emerging from the themed issue is the problem in including men's experience in social protection and intergenerational care practices. There are several reasons put forward for this absence. Firstly, as we highlighted above, far fewer men are grant beneficiaries or carers. Moreover, there is emerging evidence that young men think that they should not receive state grants (Dawson and Foukman, 2016) and therefore are less likely to want to participate in such research studies. Furthermore, because of women's greater propensity to be beneficiaries and care-providers, they are more likely to come forward for studies on topics relating to family life, social protection and care. An emphasis on the carers and beneficiaries has meant that often the men's experience is overlooked, and further research is required to investigate men's different experiences of social protection as dependents, beneficiaries, carers or bystanders.

Overview of the Special Issue

The papers in this themed issue draw on a mix of methodologies, approaches and data sources to probe the social and distributional effects of public provision as well as legal regulation on inter-generational relationships. Sources include data from courts, sample surveys, in-depth interviews, focus groups and archival research (including content analysis of parliamentary debates on welfare reform).

The first article, by AUTHOR1, considers how the management and use of grants are contested in contexts of parental absence and internal maternal labour migration. Drawing on qualitative interviews with members of migrants' families, the article illustrates the tensions between labour migration as a continuing livelihood strategy and social grants. The article reveals how the labour migration of young mothers results in socio-economic shifts in households which lead to contestations of the Child Support Grant, where children, grandmothers and the labour migrant contest the management and use of the grant. This tension is made worse by the already vulnerable position of grandmothers who might be both unemployed and too young to receive the old age grant.

In the second article, AUTHOR2 examines the position and conceptualisation of the disability grant, which is often neglected in social policy analysis. Disability is a significant area for state intervention in South Africa. The article explores how the grant places the disabled grant beneficiary in an ambivalent position. On the one hand the grant provides a stable income to

the household giving disabled people the opportunity to exercise agency, to be seen as valuable and to secure care and support from household members. On the other hand, the grant also creates conflicts over how income is shared and may lead to the extortion, abuse and neglect of disabled people, particularly in cases of severe disablement.

AUTHOR3's article explores the consequences of old-age pensioners becoming household breadwinners, often rendering adult children or grandchildren as dependents. The state has redrawn the boundaries of grandmothers' responsibilities in multigenerational households. Negotiations around the provision of resources for caregiving reflects unequal power relationships with the households and added to the emotional and financial vulnerabilities that female pensioners experience in their capacities as caregivers.

The following article, by AUTHOR4, examines how current social and legal structures do not always support diffuse patterns of kin dependency across generations. An analysis of court cases reveals tensions between a legal framework that attempts to accommodate diffuse patterns of kin dependency and the practices of state institutions, specifically the Road Accident Fund. The state, through the courts, actively promotes intergenerational interdependencies but the Road Accident Fund operates on the basis of very different assumptions about families and kinship.

The final article, by AUTHOR5, uses survey data to probe how young South Africans distinguish between deserving and undeserving claimants on both the state and kin. Through an innovative methodological quantitative approach, the article shows that there is a clear and generally intuitive hierarchy of 'desert' with respect to public welfare. Deservingness with respect to different categories of kin – i.e. the 'radius' of responsibility for kin – varies less markedly, but with some variation between racial or cultural groups. AUTHOR5 argues that public and private support appear to be complements not substitutes for each other, in that the people identified as deserving of state support are generally the same kinds of people identified as deserving of support from their kin.

This set of articles shows how inequalities in public provision combine with familial norms to transform families and generate new tensions within them. The literature on welfare-state-building in the global North has been alert to the effects of public provision on social stratification, but the literature on the global South has been slow to explore the effects on

social relations, including inter-generational relations, within households and families. This set of articles contributes to demonstrating some of the complexity of welfare-state-building in the global South. Expanding state intervention through the welfare state has mitigated poverty and inequality and helped to buttress the dignity of disadvantaged groups. At the same time, in the South African case, it has led to the recasting of responsibilities for support and care, which has become a process imbued with conflict and with effects varying by class, race, gender and generation.

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■ Author's calculations using data on old age pensions and disability grants from the General Household Survey. By March 2016, 12 million child support grants were being disbursed monthly to 6.6 million adult caregivers, almost all of whom were women (Hall, 2017: 45).