

DAWN DISCUSSION PAPER #45

POLICY TRANSFORMATIONS

A photograph of a woman in a yellow tank top with a red and black pattern, carrying a large green bucket on her head. She is looking down at her smartphone. The background shows a staircase with a metal railing and a wooden handrail. The image is framed by a white, torn-paper effect at the top and bottom.

SOUTH AFRICA
SOCIAL PROTECTION THROUGH FISCAL
POLICY DURING THE COVID-19 PANDEMIC

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DRAFT for discussion

POLICY
TRANSFORMATIONS

REGION:	POLICY AREA:
AFRICA	● CARE AND SOCIAL PROTECTION
	● MACROECONOMICS

Using a feminist intersectional and interlinkages approach, this project closely examines policy changes that have taken place during the period of exceptionality produced by the pandemic, exploring how they may impact the future in four policy areas: macroeconomics; labour policies and workers’ rights; migration and human mobilities, care and social protection.

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ABBREVIATIONS

BIG	Basic Income Grant
CDG	Care Dependency Grant
CSG	Child Support Grant
CSO	Civil Society Organisations
DG	Disability Grant
FCG	Foster Care Grant
IFI	International Finance Institutions
IMF	International Monetary Fund
NIDS-CRAM	National Income Dynamics Study (NIDS) – Coronavirus Rapid Mobile Survey (CRAM).
SALDRU	Southern African Labour and Development Research Unit
SRD	COVID-19 Social Relief of Distress Grant
UBIG	Universal Basic Income Grant
OAP	Old Age Pension

DRAFT for discussion

ABSTRACT

Prior to the pandemic, South Africa already had a well-established social assistance programme derived from the Constitution. Despite this, the programme was not adequate in meeting the basic needs of households and individuals, exacerbated by the long-standing exclusions for the able-bodied population in the age bracket of eighteen to fifty-nine age, particularly for black and coloured women and youth who are vulnerable in the economy. During the pandemic, government introduced special grants, including the COVID-19 SRD grant for unemployed people between eighteen and fifty-nine as well as a caregiver grant which this paper explores. These measures provide a ray of progressivity into how governments can provide social protection through fiscal policy. The COVID-19 SRD grant, for example, has been viewed as a potential pathway to a Universal Basic Income Grant (UBIG) by civil society and the Department of Social Development which would be a significant policy change to adequately address the needs of those in the non-waged economy. The study demonstrates how pre-pandemic orthodoxy has been perpetuated through the pandemic policy responses and how these approaches risk cementing the status quo of austerity. In line with the DAWN's Policy Transformations analytical framework (Llavaneras Blanco and Cuervo, 2021), this study explores the interlinkages between macroeconomic policy, specifically fiscal policy, and social protection during the first period of COVID-19. I apply a feminist approach, understanding how these measures impact existing power relations, particularly inequality. An intersectional lens that takes into account gender, geographic, and racial inequalities was also applied. Focus is placed on social reproduction and how social protection plays a role in ensuring the critical work of reproducing, caring and maintaining life, which includes, but is not limited to, the reproduction of the labour force.

I. INTRODUCTION

The COVID-19 pandemic has worsened the crises that South Africa has been dealing with for decades. The pandemic has been exacerbated by the weak and poorly implemented protections offered by government, as well as international factors and failures such as the lack of multilateral efforts on debt and financial assistance. Structural features of the economy and its position in the world economy (historically and currently) underlie the failure of the country to create decent work, and sustainable livelihoods for the historically marginalised majority. Thus, the pandemic has raised questions about how society is organised around productive and reproductive work as well as provides an opportunity to rethink macroeconomic policy and the role of the state in providing social protection for those who the socioeconomic system has left vulnerable.

Prior to the pandemic, South Africa had a well-established social assistance programme, derived from the Constitution. The Constitutional mandate is that “everyone has the right to have access to social security, including, if they are unable to support themselves and their dependants” (SA Department of Justice, 1996, Chapter 2). This has translated into a significant proportion of social spending going towards social grants in an attempt to address the historical and ongoing intersectional, racialised and gendered inequalities in the economy. Social grant recipients have grown from almost four million (nine per cent of the population) in April 2001 to over eighteen million (thirty per cent of the population) in 2021 (Zulu, 2021). The staggering increase within the decade can be attributed to change in the eligible population as a result of the gradual raising of the age limit for the Child Support Grant (CSG), as well as the failure to address the socioeconomic dispossession that the majority, who are black. The main grants provided prior to COVID-19, which are subject to income-based means-testing, include the Old Age Pension (OAP), Social Relief of Distress Grant (SRD), Disability Grant (DG), Foster Care Grant (FCG), Care Dependency Grant (CDG) and the CSG. The beneficiaries of these grants are permanent residents, refugees and South African citizens.

Despite the assistance, poverty remains unconscionably high. Between 2011 and 2015, an additional three million people were pushed into poverty. In 2015, fifty-five per cent of the population — thirty million people — lived below the official poverty line of R992 (US \$67) per person per month. All grants fall below the national minimum wage of R3,904 (US \$266)

per month. Poverty was higher for female-headed households than male-headed households (forty-nine per cent versus thirty-three per cent). A quarter of the population lived in ‘extreme poverty’, unable to afford enough food to meet their basic physical needs (Statistics SA, 2017). Vulnerability to poverty is highest for teenage girls living in rural parts of the Eastern Cape and Limpopo (Statistics SA, 2017). The feminisation of poverty has been driven by, and not limited to, gendered power asymmetries within households, inequalities in the access to public services or in their quality, and labour market inequalities. While the last official estimates were provided in 2015, more recent data from the World Bank estimates project that extreme poverty would increase in South Africa by nine per cent in 2020 (Sulla, 2020).

The system has failed to sufficiently target those who are in the non-waged economy, including caregivers and those who are unemployed and of working age, in particular black and coloured¹ women and youth who are particularly vulnerable in the economy. Government has rescinded its Constitutional commitment to ensuring minimum social protection – below which no one should fall – over the entire lifecycle (SA Government, 2012). This includes minimum income and access to basic services (health, education, housing, food, water and sanitation etc.).

As provided by the Constitution, relief during crises had to be made available through state provisioning (SA Department of Justice, 1996, Chapter 2). Government introduced the COVID-19 SRD grant, targeting unemployed individuals between eighteen and fifty-nine, which this paper focuses on. The paper also discusses, briefly, the introduction of a caregiver grant which feminist economists have long been interested in. The paper lastly touches on the prospects of a Universal Basic Income Grant (UBIG) which has emerged as a conversation to be reckoned with.

Despite the temporary expansion of social security, this is now under threat as the National Treasury accelerates its austerity programme which began as early as 2014/15, endorsed by the International Monetary Fund (IMF) and much of the business press (IMF, 2020). Austerity is defined as fiscal policy (budget cuts and/or increasing taxes) implemented by a state aimed at solving debt and growth problems during a period of economic stagnation (Wren-Lewis, 2015). Austerity, in part, explains why the social protection measures have been approached in a stop-start manner, with civil society having to continuously advocate and fight for continued and expanded social protection measures. The stop-start

manner highlights the supranational and constitutional-defying power of financial markets, international financial institutions (IFIs), the business press and the private sector's neoliberal influence on public policy.

Through this case, I demonstrate how pre-pandemic orthodoxy has been perpetuated through the pandemic and how this is likely to cement the status quo moving forward despite some progressive policies having emerged due to COVID-19. This case assesses and analyses the DAWN's Policy Transformations hypotheses that South Africa may be:

Muddling through, also known as business as usual. The capacity for strategic planning and identification of new policy and program options may be so weak that a government is unable to respond in innovative or creative ways. Instead, it may carry on with the same old policies even though there may be an uneasy awareness that more is needed. (Llavaneras Blanco, and Cuervo, 2021, p.12).

II. CONTEXT

HISTORICAL CONTEXT: THE FOUNDATIONS OF A SOCIAL CRISIS

The severe need for social assistance in South Africa requires that we begin with understanding how social reproduction (the production of goods and services and the production of life as part of one integrated process) was engineered through settler colonisation and during Apartheid (1948-1994) and how the systems of exploitation and oppression have shaped the current context. A feminist approach to understanding households requires that we take into account i) diversity among household configurations, ii) inequality within the household, iii) inter-household relations, iv) longitudinal processes (Stevano, 2020).

The systematic oppression and exploitation of Black labour played an early and deliberate role in shaping the asymmetric power relations in the industrialisation and wealth accumulation processes - and the trajectory of capitalist accumulation more generally. This system included the cheap labour of black men and the unpaid and underpaid work of black and coloured women.

The apartheid state played an active role in enforcing spatial and socio-economic separations between production and social reproduction (Cousins et al., 2018). The system of labour migration established to supply cheap labour to the mining industry marginalised land-based livelihoods of the rural population with few compensating employment opportunities. The system demanded that those left behind in the former *Bantustans* (black homelands that were geographically determined by the colonial regime and formalised under Apartheid) undertake unpaid labour, for example, subsistence agriculture and rearing of children, to reproduce the labour force being sent off to the cities and the mines.

These structures set Black men apart from their families and contributed to the long-term fragmentation of families and men's detachment from childcare (Budlender and Lund, 2011). Black women carried the burden of social reproduction with white women displacing their responsibilities for social reproduction onto Black women whom they hired as domestic workers to take care of their homes and children (Sibeko, 2021). Care was deliberately feminised. This dispossession of land from the Black majority has also meant that the people have been deprived of natural resources, such as water. This has made social reproduction, in the absence of wages and adequate state support, even more difficult, for instance, in the fight against disease and securing adequate sustenance. Cousins *et al.* (2018) argue that policies for land reform, accumulation and social reproduction should take into account the following: land and property rights, fragmented classes of labour, communal areas, customary norms and values, customary and social institutions.

These processes have systematically undermined the bargaining power of women which is determined by both quantifiable (i.e., economic assets) and non-quantifiable factors (i.e. community-based support) (Agarwal, 1997). Thus, social protection, in the form of grants, has been critical to the social reproduction of the black population, particularly women, children, and those who are unable to participate in or are excluded from, the waged economy.

THE CURRENT CONTEXT: MULTIPLE CRISES

After almost three decades of democracy, South Africa faces multiple crises and is not a viable society for the majority. South Africa has world-leading levels of inequality, with a Gini coefficient for income distribution of 0.67 (Stats SA, 2020; IMF, 2020b). The average income per capita in large cities is almost twice the levels as that found in the mostly rural provinces (IMF, 2020b). The income inequality is also gendered, with women earning thirty per cent less than men on average, with larger disparities amongst low-skilled workers. Wealth is even more unequally distributed with a Gini coefficient of 0.95 – estimates indicate that the wealthiest one per cent of the population, predominantly white, own half of all wealth, while the top ten per cent owns at least ninety to ninety-five per cent (Stent, 2020). Wealth is concentrated along race and gender lines, with a large proportion being held by white and male persons. This has reproduced a perpetual cycle of a crisis of social reproduction, and broader crises, within the black working class.

The National Development Plan identifies employment as the best form of providing income to secure livelihoods, yet in 2015, fifty-four per cent of full-time workers earned below the ‘working poverty line’ of R4,125 (US \$281). This was the amount needed to bring them and their dependents above the poverty line. Thus, wages have not provided income security (Finn, 2018).

The country was in a precarious economic position even before the pandemic. South Africa’s growth has trended downwards since 2010/11, averaging just below two per cent between 2011 and 2018 (Sibeko and Isaacs, 2020). Pre-pandemic, the economy was already failing with the country being plunged into its third recession since 1994 in 2019. According to Sibeko and Isaacs (2020, p. 9), factors include the global downswing, declining commodity prices, restrictive macroeconomic policies, insufficient electricity supply, amongst others.

Unemployment was particularly high at twenty-nine per cent (expanded definitionⁱⁱ) in Quarter four of 2019. The unemployment rate of Black young women was fifty-nine per cent, a third higher than the national average and seven times greater than the white population group (Stats SA, 2019). Youth and young women were particularly vulnerable. The pandemic has exacerbated the already dire unemployment situation. As of Quarter two of 2021, unemployment had increased to thirty-four per cent (expanded definition: forty-four per cent)

- the highest level since 2008 (Stats SA, 2021). The unemployment rate among the Black African population group remains higher than the national average and other population groups. By gender and race, black women have a high level of unemployment at forty-one per cent (expanded: fifty-three per cent). Youth aged fifteen to twenty-four years and twenty-five to thirty-four years recorded the highest unemployment rates of sixty-four per cent and forty-three per cent respectively. Unemployment levels are particularly high in the Eastern Cape, Limpopo, and Northern Cape, where half of the working-age population is unemployed.

Black and coloured women have been historically excluded from waged work and when they are in waged work, Mosomi (2019, p.8) shows that “[w]omen are over-represented in the lowest-paying occupations (domestic work) and under-represented in the highest-paying occupations (legislators, senior officials, managers)”. Gradin (2018) and Espi et al. (2019), argue that the lowest occupation ranks are Black and coloured women, with Black women suffering double segregation as a result of race and gender. In addition, South Africa continues to have a persistent gender wage gap. South Africa’s Employment Equity Act to eliminate gender and race wage disparity has not been adequately implemented. On average, women earn thirty per cent less than their male counterparts, with Black women earning forty per cent less (Stats SA, 2020).

In addition, the integration of women into the workforce generally assumes “workers’ full-time and lifelong participation in the workforce” and does not take into account “how those workers are sustained or how their households are structured” (Sibeko, 2021, para 1). At the same time, Black women conduct at least five times more social reproductive activities than men (Oxfam South Africa, 2019). Unpaid labour is extracted on two fronts for working-class women – from waged work, and from unpaid housework.

Despite these dire socioeconomic conditions, since at least 2014/15, government has introduced austerity measures. Austerity has meant cuts to health and education budgets, for example, which are integral to social reproduction. It is important to note that South Africa is not a recipient of conditional lending from the Bretton Woods Institutions. The decision to pursue austerity reflects the internalised and normalised neoliberal agenda which has become de facto self-enforced.

The National Treasury has justified this by arguing that the necessary government borrowing ‘crowds out’ private investment (National Treasury, 2021), a tenet of neoclassical economics. This has driven the logic of budgetary cuts to appease credit rating agencies and the markets. The crowding-out argument is one of the fundamental assumptions in neoliberal macroeconomic policy. It has been central to the implementation of austerity and the enforcement of the global economic order, underpinned by a global financial architecture that prioritises the profits of capital, and finance capital in particular, at all costs. Governments would rather prioritise debt repayments above socioeconomic rights and the survival of their own citizens.

SOCIAL ASSISTANCE POLICY CONTEXT: CRITICAL BUT INSUFFICIENT

Civil society in South Africa has long advocated for increased social security as part of comprehensive social protection measures. For example, in the 1980s, trade unions advocated for the expansion of social pensions to include black workers. The child support grant was introduced in 1998 (Westphal, 2016). In the late 1990s and early 2000s, a significant push was made by civil society parts of government to secure a Basic Income Grant (BIG). In 2002, the Taylor Committee, established by government to inquire into a Comprehensive System of Social Protection, recommended a grant for those who are still currently excluded (Taylor et al., 2002). This was never acted upon.

The value of the grants, as a share of different poverty lines, has generally declined since 2011/12 (Budget Justice Coalition, 2020, p.42). In 2011/12, the CSG would have covered seventy-nine per cent of the cost of basic foodstuffs necessary to avoid hunger. By 2018/19 it only covered seventy-one per cent of the cost of these goods, meaning a decline of eight per cent (Budget Justice Coalition, 2020). As of the Budget 2021, the CSG was R445 (US \$30), yet the food poverty line was R585 or US \$40 (recently updated to R624 or US \$43). Similarly, the value of the OAP declined, between 2014 and 2019, relative to the upper-bound poverty line. Table 1 below outlines the grant rates at the onset of the pandemic as well as the eligibility criteria as stipulated by the South African Social Security Agency (2021).

Table 1: South Africa's social grants, eligibility criteria and amounts

Grant	Eligibility criteria	Amount (per month)
Old Age Pension (OAP)	<ul style="list-style-type: none"> • Applicant/beneficiary: Not receive any other social grant for yourself, not be cared for in a state institution, not earn more than R86,280 a year (US \$5 869) and not have assets worth more than R1,227,600 (US \$83,510) a year if you are single - or double the values if married. Grant is paid to people who are sixty years or older. 	R1,860 (US \$126)
Disability Grant (DG)	<ul style="list-style-type: none"> • Applicant/beneficiary: Must be between eighteen and fifty-nine. Not be cared for in a state institution, not earn more than R86,280 (US \$5,869) and not have assets worth more than R1,227,600 (US \$83,510) a year if you are single - or double the values if married, undergo medical examination where an appointed doctor will assess the degree of your disability, previous medical records and reports required. 	R1,780 (US \$121)
Foster Care Grant (FCG)	<ul style="list-style-type: none"> • Applicant: The foster child must be legally placed in the caregiver's care, as a result of being: orphaned, abandoned, at-risk, abused or neglected. The child must remain in their care. • Beneficiary: The child must be younger than eighteen. 	R1,000 (US \$68)
Care Dependency Grant (CDG)	<ul style="list-style-type: none"> • Applicant: Must be a parent, primary caregiver, or a foster parent appointed by the court. Not earn more than R223,200 (US \$15,183) a year if you are single. Your combined income should not be above double the amount a year if you are married. This income limit does not apply to foster parents. • Beneficiary: Must be younger than eighteen, not be cared for permanently in a state institution, have a severe disability that requires full-time care. Medical assessment requirement. 	R1,860 (US \$126)

Child Support Grant (CSG)	<ul style="list-style-type: none"> • For the caregiver (applicant): Not earn more than R48,000 (US \$3,265) a year if you're single. If you're married, your combined income should not be above double this amount. • Beneficiary: Be under eighteen, not be in the care of a state institution, and live with the primary caregiver, who isn't paid to look after the child. 	R425 (US \$29)
Social Relief Distress Grant (SRD)	<p>This could be initiated for a temporary period due to any of the following factors:</p> <ul style="list-style-type: none"> • you need help while you wait for your children's grants to be processed; • a crisis or disaster has occurred.; • you do not qualify for a grant, and you are in a desperate situation; • you are unable to work for a period of less than six months because you are medically unfit; • you are unable to get maintenance from the other parent of your child or children; • the breadwinner in the family has died; • the breadwinner has been sent to prison for a short time (less than six months). 	The SRD grant may be in the form of a food parcel or a voucher to buy food. Some provinces give this assistance in the form of cash. SRD grant is given for a short time only – usually for up to three months, which may be extended.

Source: South African Social Security Agency (2021).

Relative to the monthly food basket price which is over R4,000 (US \$250) per month, the above grants are on average insufficient to meet the full basic needs of households (Pietermaritzburg Economic Justice & Dignity Group, 2021). In addition, means testing introduces a range of distortions and potential problems including exclusion errors.

Thus, government increased intervention critical to protecting households especially in the context of anticipated large-scale job losses, increasing hunger incidence, and the broader negative economic outlook.

In the next section, I analyse the COVID-19 responses implemented during the crisis, taking into account the context outlined here.

III. ANALYSIS OF COVID-19 SOCIAL SECURITY RESPONSES

In April 2020, South Africa announced the largest COVID-19 socioeconomic response package on the African continent. Despite this ‘bold’ policy rhetoric, policy implementation (or the failure thereof) has reinforced the existing conservative fiscal policy trajectory. Instead of the announced R500 billion (US \$34 billion), the Supplementary Budget presented a net increase to non-interest spending (spending on everything but debt) in 2020/2021 of just R36 billion (US \$2.5 billion), or less than one per cent of Gross Domestic Product (GDP). The rescinding of the President’s COVID-19 socioeconomic response package by National Treasury was not a new phenomenon in the political economy of South Africa. For example, in 2019, the President announced R1.6 billion (US \$0.1 billion) to fight Gender-Based Violence and Femicide. The money was not allocated as new funds in the subsequent budget.

The reality is that R109 billion (US \$7.4 billion) of the response was funded through the suspension of baseline allocations and reprioritisations (essentially cuts from existing programs) as opposed to new money being injected into the budget. For example, R2.1 billion (US \$140 million) was cut from the Education budget. The Budget Justice Coalition notes that the funding “was previously allocated to longer-term projects like school buildings and support for maths, science and technology” (Budget Justice Coalition, 2020, p.37). Table 2 gives an overview of the COVID-19 relief areas and announced amounts.

Table 2: South Africa’s R500 billion package

Relief areas	Item
Social security	R50 billion (US \$3.4 billion) towards new and existing grants (cut to R41 billion [US \$2.6 billion] in the Supplementary Budget).
Job creation and protection	R100 billion (US \$6.8 billion) to job protection and creation schemes.
Wage relief	R40 billion (US \$2.7 billion) to pay wages and avoid job and income losses. Financed from Unemployment Insurance Fund surpluses.
Credit guarantee scheme	R200 billion (US \$34 billion) to provide loans to businesses, substantially guaranteed by government through the South African Reserve Bank and facilitated by the banks.
Tax relief	R70 billion (US \$13.6 billion) in tax deferments.
Municipalities	R20 billion (US \$1.4 billion) to support municipalities in providing proper water and sanitation, sanitary public transport, food provision, and accommodation for the homeless.
Health	R20 billion (US \$1.4 billion) to support municipalities.

*Data from the table above extracted from Institute for Economic Justice (2021).

Although emergency social security measures were implemented (see below), the pandemic response was overall biased towards business rescue as opposed to social protection. Half of the response was allocated to businesses, highlighting the contradictory approach to the role of the state under neoliberalism - limiting its 'interference' in the market on the one hand but rescuing businesses during crises on the other (Clarke and Newman, 2012). This also demonstrates the bias towards what is considered to be 'productive' expenditure versus 'consumption'.

As of July 2021, only R202.6 billion (US \$13.7 billion) of the R500 billion (US \$34 billion) package had been implemented over a year into the pandemic – a huge failure on government's end. The failure can be attributed to several factors, including poor design, self-imposed austerity, and corruption. For example, the credit guarantee scheme for businesses, which was forty per cent of the package, did not take into account that heavily indebted firms would be reluctant to accumulate more debt and that traditional credit-worthiness checks would exclude many businesses in financial distress.

In terms of social protection, the original R50 billion (US \$3.4 billion) social security package included: 1. COVID-19 SRD - R350 (US \$23.8) per month (May - October 2020); 2. Caregivers Allowance - R300 (US \$20.4) in May 2020, R500 (US \$34) per month thereafter (until October 2020); 3. All other grants - increase of R250 (US \$17) per month (May - October 2020). The COVID-19 SRD was available to unemployed persons, with no income between the ages of eighteen and fifty-nine. The Caregivers' allowance provided for caregivers who receive the CSG on behalf of the children in their care.

The introduction of the COVID-19 SRD represented a significant and progressive measure that was introduced in response to the crisis, given the long-standing gap in social protection. The grant initially provided a lifeline to about six million unemployed people in South Africa. In addition, ten per cent of households depended on the COVID-19 SRD solely for their income (Spaul et al., 2021). Even though the grant is lower than the food poverty line (R585 or US\$40), it contributed important income to very poor households. According to Spaul et al. (2021), the grant is considered to have been well-targeted and able to alleviate some of the hardships experienced by households during the pandemic for those who were able to access it (Spaul et al., 2021). The exclusion of women in these analyses is understated.

The COVID-19 SRD was initially implemented between May 2020 and October 2020 and further extended to April 2021. During its implementation and following its termination in April 2021, many civil society organisations called for its reinstatement, increase, and expansion of the criteria which had excluded many vulnerable groups. About ten million people were living in a household affected by hunger in April/May 2021, including three million children (#PaytheGrants, 2020). However, government did not yield to these calls despite a looming third wave of the pandemic which would bring about additional lockdown measures. It can be assumed that the grants were stopped because of government's 'fiscal pressures', as well as the false assumption that the country had passed the 'rescue phase' and was now in recovery. Visagie and Turok (2020) warn that temporary grants may "create vulnerabilities in poor communities if they are withdrawn prematurely" which was likely the case when the grants were ended in April 2021. The grant was later revised and reinstated, a topic picked up further below but preceded by an analysis of the original social assistance programme.

DRAFT for discussion

GEOGRAPHIC DISTRIBUTION

The spatial Apartheid conditions (the deliberate act of putting marginalised peoples in remote areas) requires targeted approaches to implementation as opposed to a nationwide, one-size-fits-all approach. Government seems to have this weighting correct, with rural applicants being the highest recipients of the COVID-19 SRD. Table 3 below shows the percentage of residents in various areas who received the grant.

Table 3: Access (percentage values) to COVID-19 grants by geographic location in June 2020

Geographic location	Access (percentage)
Rural	Thirty-three
Cities and towns	Twenty-four
Metropolitans	Twenty-one
Peri-urban areas	Twenty-nine
Townships	Twenty-seven
Shack dwellers (those in informal settlements and backyards)	Eighteen
Suburbs	Sixteen

Source: Visagie and Turok (2020) The Uneven Geography of the COVID-19 Crisis (Wave 2). National Income Dynamics Study (NIDS) – Coronavirus Rapid Mobile Survey (CRAM). Available at: https://cramsurvey.org/wp-content/uploads/2020/09/14.-Visagie-J.-_-Turok-I.-2020-The-uneven-geography-of-the-COVID-19-crisis.pdf. (Accessed 9 October 2021).

Visagie and Turok (2020) note that the proportion of shack dwellers that received these and other grants is surprisingly low, considering their levels of poverty and distress. This is particularly concerning given that twenty-three per cent of shack dwellers said someone had gone hungry in April/May 2021 compared to fourteen per cent on average (Githahu, 2021). Visagie and Turok (2020) note that part of the disparity may have been caused by the disproportionate representation in precarious work. More research is required to unpack the low access.

THE EXCLUSION OF WOMEN AND VULNERABLE GROUPS

Women and refugees and asylum-seekers were, initially, heavily excluded from the COVID-19 SRD because caregivers, who received a Caregivers' Allowance were illegible. This remained the case even when the Caregivers' allowance had ended. This meant that a mother and child were expected to both survive on only R450 (US \$30.6) per month from 1 November 2020, far below an amount sufficient to cover their basic needs (see above).

Between May and October 2020, the grant reached an average of five and a half million recipients. According to the national representative NIDS-CRAM Wave 2 household survey (conducted in June 2020), fifty-five per cent of the recipients were males. Between May and December 2020, the percentage of male recipients rose to sixty-eight per cent. The recipients were disproportionately male even though there are disproportionately more unemployed women. This was primarily because of the exclusion of caregivers.

Asylum-seekers and special permit holders were also initially excluded from the SRD. As civil society group Black Sash (a human rights organisation advocating for social justice) has shown, it was only after litigation by the Scalabrini Center, which offers specialised services to South Africans, migrants and refugees, that this vulnerable group was eligible (Scalabrini Institute, 2020). Even after the court order, the process to put a payment system in place was delayed and no payments were made to asylum seekers in 2020. The bulk of the work to ensure access to the COVID-19 SRD was through the efforts of civil society organisations and community-based advice offices (Zduńczyk et al., 2020).

Additional challenges encountered by CSOs and applicants were unfair rejections caused by outdated databases between government departments and delays in the roll-out of the grant due to the lethargic pace in setting up systems. This meant it took longer for the money to get into the hands of the recipients. It was revealed that during the first rollout of the program, a total of 571,724 approved grants remained uncollected. The unclaimed grants are a result of multiple systematic failures such as poor communication to beneficiaries, costs associated with collecting grants, the online application systems were only available in English, geographic challenges and the lack of capacity to roll out (Sonjica, 2021). In August 2021, when the COVID-19 SRD was reinstated, the Department of Social Development only allowed twenty-seven days for the applicants to make their claims before they would have to

forfeit them. Many applicants were still struggling with the appeals process which also had a short window for application. CSOs called for the Department to urgently attend to the grant's numerous administrative inefficiencies.

The #PaytheGrants movementⁱⁱⁱ and other CSOs have flagged many issues that led to rejections, including the use of a means-testing. The means testing element of the grant did not take into account the diverse strategies employed by households for survival. COVID-19 SRD grants were declined where recipients were found to have any funds flowing into the account of an applicant during the previous month (SASSA, 2020). The current system does not take into account complex households and intra- and inter- household income distributions. For example, it does not take seriously the role of 'black tax' - inter household transfers, primarily from Black workers to other members of their extended family or family networks - which has systematically subsidised the failures of the state. This means that money flowing into accounts could be remittances from family members, rather than earned income by the grant application. It also doesn't account for the fact that an estimated eleven million South Africans are unbanked or underbanked which may lead to sharing of accounts (BusinessTech, 2019).

THE CAREGIVER ALLOWANCE

The introduction of a Caregiver Allowance provides an interesting case for remunerating care work, which feminist economists have long been interested in. The reason these 'top ups' to the CSGs have been called a Caregivers' Allowance is because they were implemented per caregiver, as opposed to per child, making the caregivers the direct beneficiaries.

The concept of a caregiver grant was not deliberate, rather it is an outcome of the desire to support households while reducing total costs. While the President promised a R500 (US \$34) top-up to the CSG per child, the Minister of Finance and Social Development's media statements following the President's speech diluted this commitment to R300 (US \$20.4) per child in May and then R500 (US \$34) per caregiver for June to October. Government tacitly argued that caregivers were better off because they received R500 (US \$34) instead of the R350 (US \$23.8) SRG grant. At the same time, they also argued that this grant gave extra

support to children. Both cannot be simultaneously true. If the R500 (US \$34) was meant to provide additional support to children - as is the case - then the caregivers themselves were not receiving any benefit and were unfairly excluded from the SRG grant.

This decision was driven by the prevailing austerity logic, effectively saving the state R13 billion (US \$0.9 billion), but resulting in at least six point four million (6.4 million) children continuing to live below the food poverty line, and their caregivers (mainly women) bearing an increased financial burden at a time when food prices were increasing, the school feeding scheme and Early Childhood Development feeding schemes were closed, and jobs were being lost. The response, therefore, failed to take into account the structural inequalities that caregivers already face. During the first lockdown, two-thirds of the jobs lost were womens' who were less educated, poor, black Africans and informal workers, and who were already disadvantaged in the labour market (Casale and Posel, 2020). This is because women were overly represented in non-essential retail and service occupations which were not allowed to operate during the lockdowns. Informal workers, which are disproportionately women, were also barred from operating.

The implementation of lockdowns disproportionately affecting women's unpaid work, which was already high relative to men before the pandemic. Time use on unpaid activities was exasperated by the crisis. Casale and Posel (2020) show that "nearly 80% of women who were spending more time than usual on childcare were spending more than 4 extra hours a day on it, compared to sixty five per cent of men". Even in households where domestic care work is paid, the absence of the workers due to lockdown meant that households had to internalise that work, including care of the elderly, children, the sick, and care of others within the household through activities such as washing, cooking, and cleaning (Sibeko et al. 2021).

Caregivers' eventual inclusion was won through the efforts of various progressive research institutions and civil society advocacy.

The exclusion of caregivers from the COVID-19 SRD undermines government's pro-women rhetoric, as policy considerations did not sufficiently take into account their intersecting oppressions and exploitations. Caregivers were likely excluded because of exaggerated concerns of double-dipping into grants which are government's failure to separate

beneficiaries and recipients. Despite South Africa being one of the first countries to consider gender-responsive budgeting in the world, policies have not taken seriously the care work undertaken by women. Policy choices have traditionally been driven by the narrow conceptualisation of ‘the economy’ advanced by neoliberal economics, as merely a site of production and market-based activities, obscuring the extensive social relations that are also essential for the reproduction of capital, the labour force and society, broadly speaking (Sibeko, 2021).

Caregiver grants could be a way to compensate and value women’s work in the economy. Some feminists hold that an unconditional income independent of paid work would enhance women’s agency in families, households, the workplace, and the community, with particular benefit for those facing multiple and intersecting forms of discrimination (Williams, 2021). The existing evidence on grants in South Africa point to the same benefits. Granlund and Hochfeld (2019, Section 1) argue that “South Africa’s cash transfers have largely had positive social transformative effects on individuals, in relation to a sense of dignity, autonomy and increased decision-making powers for primary caregivers, usually mothers or grandmothers. Positive effects were also perceived in relation to these households and communities, although some contested effects and limitations were also found”. Research in South Africa shows positive outcomes for women’s financial independence and decision-making power due to access to the CSG (Patel et al., 2015). It has been further argued “that gaining access to an independent income, in this case, the CSG, offers the potential to challenge a subordinate role with less economic and social power within the family and community, and therefore potentially rebalance unequal power relations” (Granlund and Hochfeld, 2019, Section 1). A caregiver grant, or some sort of wage independent grant, like a BIG, would help to diversify the sources of income that households need to sustain themselves.

THE REINSTATEMENT OF THE GRANT

Amid the pandemic, on 7 July 2021, the arrest of the former South African President, Jacob Zuma, plunged the country into a new wave of violent protests and looting. As a result of the associated lockdowns and these protests, in July 2021, Treasury announced an R38 billion (US \$2.6 billion) response package to respond to the ongoing crises. The COVID-19 SRD was reintroduced from August 2021 to March 2022, with applications

having to re-apply for the programme, now including caregivers. The means-testing was also relaxed, with the minimum amount for eligibility increased to the food poverty line (R585 or US \$40 at the time).

According to the President, since the applications opened in August 2021, more than twelve million people have applied, seven million of these have been approved and four-point seven million have been paid as of September 2021 (Zeeman, 2021). There are now nine million approved recipients. The slow rollout during a period of crisis remains a critical concern. On the positive side, since the inclusion of caregivers, the majority of the applicants (fifty-two per cent) are female. The majority of applications (sixty-two per cent) also come from young people between the ages of eighteen to thirty-five. Given the high rate of youth unemployment, this is to be expected. These are the two groups that are most vulnerable in the labour market. Thus the extension is critical to the rescue of households.

PUSHING BACK: CALLS FOR A UBIG

Given the ongoing crisis, there are now renewed calls for a UBIG in South Africa (Institute for Economic Justice, 2021; #PayTheGrants, 2020). The crisis has demonstrated the ongoing need for a comprehensive social protection program that takes into account the existing inequalities. Interestingly, the Department of Social Development has echoed calls from civil society for the COVID-19 SRD to be used as a stepping stone towards a UBIG (Omarjee, 2021).^{iv}

The National Treasury has remained steadfast in its narrative that a UBIG would be unaffordable – remaining true to its austerity agenda. It has also popularised the notion that such grants create ‘dependency’, an argument that is grounded in orthodoxy. They assume that social welfare systems lead to the weakening of incentives to join the labour force. This is despite the wide evidence dispelling this myth (Hanna, 2019).

Feminist economists have long argued for non-commodified means of existence that are non-conditional (Williams, 2021). Schulz (2017, p.1) argues that a UBIG, “if unconditional and at a level covering basic needs, would help tackle the structural inequalities inherited from the past, due to the sexual divide between the public and

private sphere”. Schulz also argues that a UBIG would be critical in delinking social protection from waged labour, which women have been systematically excluded from. However, there remains great debate within feminist economics on UBIGs, particularly in the context of financialised capitalism.^v

Prior to the 2021 Medium Term Policy Statement, there were reports that the National Treasury was considering a ‘family grant’ as opposed to individual grants to be given to one member of the household (Human, 2021). This assumes unitary households in a narrow sense which goes against a feminist approach to social protection. By contrast, we know that households are internally fragmented and one of the sites where inequalities and power differentials are reproduced. A report by the Southern African Labour and Development Research Unit (SALDRU) demonstrated that the family grant would not be feasible, given that South Africa does not have a household registry, and that it would lead to high levels of exclusion (Goldman *et al.*, 2021). CSOs also critiqued government’s secretive and closed-door approach to the proposal (#PayTheGrants, 2021).

Although the UBIG has gained traction within various constituencies, my concern remains that a UBIG, delivered in the context of austerity, could lead to disinvestment in other poverty alleviation programs (such as basic services) – as demonstrated above.

THE CONTINUED ORTHODOXY

The extreme stance of austerity adopted in the 2020 Budget (before the pandemic) should have been abandoned to address the pandemic crisis, but it was not. “The Cabinet, -then Finance Minister Mboweni said in October 2020-, remains resolute and will walk through the narrow gate towards fiscal sustainability” (National Treasury, 2021b, section 3).

South Africa’s entrenchment of austerity – while in line with traditional neoliberal orthodoxy – seems out of steps with more recent policy prescriptions. South Africa’s Treasury plans to achieve a primary fiscal surplus by 2024/25 which will be followed by a ‘stabilisation’ of debt. However, in a recent post, the IMF warns that “countries should not run larger budget

surpluses to bring down the debt, but should instead allow growth to bring down debt-to-GDP ratios organically” (Chamon and Ostry, 2021, para 8).

The premature withdrawal of the relief measures is consistent with the orthodox assumptions that cutting government spending has a relatively little adverse effect on aggregate demand. These have been discredited by studies which demonstrate that the effect cuts in government spending on output was larger than anticipated during recessionary times (UNCTAD, 2019). However, the National Treasury was not swayed by such evidence. The 2021 Budget outlines a R230 billion (US \$16 billion) reduction to spending over the next three years. These include R67.2 billion (US \$4.6 billion) to be cut from spending on public health as well as R9 billion (US \$0.6 billion) cuts from public schools.

In addition, policymakers have held perceptions of ‘social spend’ (spend on grants) as creating ‘dependency’. In recent comments, the new Minister of Finance has argued that instead of a UBIG, government should spend on upskilling people (Godongwana, 2021). Such an approach assumes that jobs and social protection are competing interests. Social protection is also a Constitutional obligation that government must progressively realise. Even when there are jobs, adequate social protection is still necessary.

Social grants will, in real terms, decline by 2.4 per cent between 2021 and 2022. The CSG, which decreases least, sees a nominal rise of three-point four per cent - from R445 to R460 (US \$28 to US \$29) - a real decrease of 0.8 per cent. Grants are being reduced despite the additional inflationary pressures, massive job losses, increased hunger and deepening inequality. All of these perpetuating the social reproduction crisis among other crises, in the context of declining provisioning of public services.

IV. CONCLUSIONS

The COVID-19 crisis has laid bare the flaws of the current social protection system, including the lack of gender sensitivity in policy design. The initial exclusion of caregivers from the COVID-19 SRD brought to the fore gender bias in design. In the absence of adequate social protection (including social assistance) that takes into account gender, race, geography and other intersectionalities, the crisis of social reproduction is likely to continue. This ongoing crisis will continue to be exacerbated by austerity which reduces access and quality of basic services which are essential for social reproduction.

This case provides a cautionary tale of the provisioning of social protection in the context of orthodoxy – how it is designed and how it is funded. Even with parts of government, notably the Department of Social Development, proposing to create and innovate new ways, there are powerful factions within government that are committed to the orthodoxy or business as usual approach. The National Treasury's commitment to austerity confirms DAWN's Analytical Framework hypotheses that government's "may carry on with the same old policies even though there may be an uneasy awareness that more is needed" (Llavaneras Blanco and Cuervo, 2021).

For social protection to be realised in South Africa, neoliberalism must be abandoned. What is needed is an adoption of a socioeconomic framework that takes into account the regenerative interaction between public investment, labour productivity, socioeconomic development, rights, and equity: An economic framework that is concerned with challenging historical and ongoing intersectional, racialised and gendered inequalities in the economy. Without a fundamental rethinking of the economics in South Africa, the social organisation of labour (reproductive, productive and otherwise) will remain unviable for the majority.

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END NOTES

ⁱ The communities designated as coloured are primarily descended from the Khoisan people who originally inhabited the western parts of South Africa, from Asian and African slaves brought to the Cape from the earliest years of the colony, from European settlers, and from other Africans.

ⁱⁱ Unemployed persons who: a) Were not employed in the reference week; and b) Were available to work but did not look for work either because they are discouraged from looking for work (see definition of discouraged work-seeker) or did not look for work for other reasons other than discouragement. – Statistics South Africa (2021).

ⁱⁱⁱ #PayTheGrants emerged out of the COVID-19 People’s Coalition, which is an emerging civil society collective seeking to ensure that South Africa’s response to the COVID-19 crisis is one that is rooted in social justice and democratic principles.

^{iv} On 8 August 2021, the Department of Social Development published a Green Paper on Comprehensive Social Security and Retirement Reform. In this document they propose the introduction of a BIG.

^v See for example DAWN Talk 4 “[A Financialised Life: what is it, and why is it a feminist issue?](https://www.youtube.com/watch?v=nRZA4vAYMns&t=3621s)” available at <https://www.youtube.com/watch?v=nRZA4vAYMns&t=3621s>

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